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# CASE STUDIES

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# Editorial

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The COVID-19 pandemic has profoundly altered many aspects of how societies function, with both fundamental short-term and very likely long-term effects. The massive disruptions to normal life, the introduction of social distancing measures, the dramatic reduction of in-person interactions, and the hibernation of economic life have been collective experiences of hundreds of millions of people all over the world. Both citizens and scientists found themselves involved in an unprecedented social experiment (Matthewman & Huppatz, 2020)nations have locked down, and individuals have socially isolated for the collective good. We find ourselves involved in an unprecedented social experiment. This living laboratory is ripe for sociological analysis. In this introductory article, we provide a broad sociology of Covid-19, paying attention to the production of pandemics and the creation of vulnerabilities. We acknowledge the dystopian elements of the pandemic: it will provide opportunities for 'disaster capitalists' to profit, it will enhance certain forms of surveillance, and it will impact some constituencies far more negatively than others (here we pay particular attention to the pandemic's gendered consequences.

After the initial closures, it quickly became clear that the epidemic would have profound social consequences. In several parts of life, people had to accommodate to rules previously unknown (Connell, 2020; French & Monahan, 2020; Zinn, 2021) and though some sociological ideas circulate in public discussions, disciplinary sociology has had little influence. Internal discussions have mostly been conventional, and familiar sociological theory and methodology seem inadequate to this situation. Taking the viewpoint of the virus helps to shift perspective on a historical moment where a deadly threat is enabled by megacities, mass air travel, callous and corrupt regimes, and the undermining of public services. In this conjuncture sociology, with other social sciences, is under threat. But we can contribute to responses that mobilize community resources to deal with a social/biological crisis, and prepare for the others that will certainly come.[1] New life situations began to emerge in which earlier norms and behaviours

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1    Connell (2020).

were challenged, while the new ones had yet to crystallize and needed to stand the test of time in pandemic. Moreover, not all of these norms have yet been clarified: although decisions at the country or continental level determine people's behaviour, these arrangements are not supported by an overwhelming majority of people. Social divisions have quickly emerged between different groups in societies: those who support or oppose the wearing of a mask, those who support lockdowns with border closures and those who support less restrictions and protection of free travel, and recently between anti-vaxxers and pro-vaxxers (Harrison, 2020). The relationship and interactions between these groups depend heavily on the history and current values in different countries and societies, but the deepening and multifaceted nature of the divide is undeniable.

Inequalities increased at all levels: some countries appeared more exposed than others, simply because of their geographical proximity, or economic and social connections to the first epicentres of the virus, and depending on the state of the healthcare system (Evenhuis et al., 2021)alongside a rise in economic and spatial inequalities in many advanced economies. The Covid-19 pandemic looks set to further amplify these problems. This Editorial begins by discussing the scale of the productivity slowdown and of the widening inequalities that have emerged, particularly with regard to their spatial dimension: that is how the uneven and slow development of productivity and rise in inequalities have played out across and within regions and cities. It then briefly considers underlying factors that lie behind these trends, including financialisation / financial globalization, the diminishing role of organised labour, segmentation of the labour market favouring workers who play a key role in financialisation, together with the increasing polarisation within societies according to skill and, crucially, the impact of changing industrial composition particularly as it relates to the rise of the high-tech sectors. The Editorial then examines in what ways the slowdown of productivity and widening of economic and spatial inequalities, may be interrelated, and questions the notion of any efficiency-equity trade-off. Lastly, it considers whether the 'inclusive growth' agenda can potentially reconcile the two ambitions of improving productivity performance and less-ening inequalities, reflecting on what inclusive growth could mean, and what it could imply in terms of policy. Thus far, it appears that an inclusive growth agenda has only gained some traction at the subnational level, which seems to reflect – at least in part – attempts by cities and regions to address gaps in policy left by national governments.[2] Later, unequal access to different vaccine supplies and various government regulations have further increased the ine-qualities between and within countries. The strategy of governments, their ability to rely on their institutions, people's overall level of trust and their willingness to comply with the new regulations have all proved to be factors, which largely determined the spread of the epidemic and its immediate health and economic impact (Clark, 2020; McFadden, 2020; Sibley, 2020). On the country level, decision-makers were heavily burdened to decrease the negative effects of the epidemic and balance between indirect economic and direct human losses. Ability to foresight and to model certain scenarios created desperate demand for information and fresh data from all levels of the state, and its citizens and businesses – that further widened the gap between governments functioning better and worse (Bol, 2021). The level of openness and transparency by governments in publishing honest information on public health status also affected the potential spread of misinformation (Larson, 2020; Romer, 2020).

Furthermore, inequalities are not unique to the international level. Vulnerable groups everywhere could find themselves in an increasingly worse situation than before (Fraser,

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2    Evenhuis et al. (2021).

2020). Differences in health condition and in access to health care became more apparent than ever. Students from disadvantaged families did not have the appropriate technical background for distance learning, many people lost their jobs because they were strongly linked to industries that collapsed within weeks. Work conditions were not equal in all remaining sectors either: not everyone could convert to home office and avoid personal contacts: those working in the health sector and those who simply could not afford not to go to their workplace were more exposed to the virus. But even for the most privileged, life did not remain as it was. Many families struggled with the blurring boundaries of work and home life during the period of lockdown. Inequalities within the family increased, mostly at the expense of women (Carlson et al., 2020; Fodor et al., 2021; Shafer et al., 2020).

Solidarity, trust in other people and also in institutions has become one of the key issues. From the very outbreak of the pandemic the contagion of the virus depends heavily on the behaviour of other people; trust in colleagues, family members or friends is crucial (Elcheroth, 2020). The same dilemma exists at the national level: how much trust people have in governments, in various institutions, whether they are taking the right and effective measures for the welfare of the citizens (Seale, 2020). Events of the pandemic – especially in its early phase – have brought to the surface exceptional manifestations of human solidarity and civil courage. The collective hardship, the common threats and experiences have led to the mobilisation of communities. However, these solidarity reserves are being depleted as we are entering the consecutive waves of the pandemic all over the world.

The same applies to trust in science and the scientific community. As a consequence, science has globally found itself in a troubled situation: there was an unprecedented instant need for novel information and data, and also an insatiable hunger for guidance in understanding the current situation. Unfortunately, such real-time diagnosis usually contradicts the logic of how scientific knowledge is generated. Researchers all over the world experienced an unparalleled demand for their work and expertise. There was, however, an exceptional situation in which members of the public not only waited with bated breath for the new scientific results to be praised. Expertise, too, was 'under attack', making scientists vulnerable to being discredited, declared responsible, and exposed to anger and frustration about the lockdowns. That manifested in the process of experiential challenge (see Brubaker's article in this issue) which refers to the gap between what people know from common sense and personal experience, and what people know about from expert models and projections.

From a purely scientific perspective, and despite the inevitable challenges, the current epidemic is also providing an opportunity for the social sciences to focus on innovations in their methodologies (e.g. to overcome the physical barriers created by lockdowns, or to simply speed up the data collection phase due to the pressure on providing quick results), to search for suitable theoretical frames in understanding the current changes, or even to elaborate new theories.

In a matter of just a few months, describing and interpreting social processes related to COVID-19 have become one of the most frequent issues in social science journals. According to our own calculations and based on data from the Scopus abstract and citation database, already in 2020, about 4 per cent of all journal articles published in the domain of social sciences referred to the pandemic in their abstracts or keywords. That figure has almost doubled to 7 per cent in the first ten months of 2021, and it is reasonable to assume that we may witness further increase in numbers, as many research are just in midst of their data collection phase or before submission. History of science has probably never seen such a rapid focus on a single cause that had an impact on literally every aspect of life.

If we take a quick look at the topics (keywords) of the published pandemic-related articles, apart from their evident diversity, they also seem to be clustered around just a few major areas of research. In general, they include most topics we briefly covered in this editorial and in the papers published in this special issue: characteristics of (online) education and its consequences, challenges to public health systems, proliferation of mental health problems, issues related to phenomena such as resilience, trust and leadership. There were numerous attempts to provide an overview of fundamental trends (and challenges for social sciences) triggered by the pandemic (Alexander & Smith, 2020; Connell, 2020; Langley, 2021; Miguel Ferreira & Serpa, 2020; Muldoon et al., 2021)narrative, and cultural performance. [3]Though the COVID-19 epidemic is a social disaster as much as a medical one, and though some sociological ideas circulate in public discussions, disciplinary sociology has had little influence. Internal discussions have mostly been conventional, and familiar sociological theory and methodology seem inadequate to this situation. Taking the viewpoint of the virus helps to shift perspective on a historical moment where a deadly threat is enabled by megacities, mass air travel, callous and corrupt regimes, and the undermining of public services. In this conjuncture sociology, with other social sciences, is under threat. But we can contribute to responses that mobilize community resources to deal with a social/biological crisis, and prepare for the others that will certainly come. [4] However, it is clear that we are still in the middle of an unfolding story, and the time is not yet ripe for major summaries.

The idea of this special issue first emerged in the early months of the epidemic, in the summer of 2020. Our aim was to seek out for research, from the widest range of social sciences, that examined the acute social, economic and political consequences of the coronavirus epidemic. To our honest surprise, we received a large number of responses to our call in a very short time. It became clear from the very first moment of the epidemic that social scientists from diverse fields began to intensively apply existing theories, collect and analyse data on the profound impacts of the epidemic. Therefore, this special issue includes several theoretical and empirical papers that are organized into four distinct blocks, each representing a different angle in studying the effects of the pandemic.

The first section is on politics, and in particular on the response of populist politics to the epidemic. It is built around Rogers Brubaker's re-published paper and explores the *Paradoxes of populism during the pandemic.*[5] The second section of the Thematic Issue is devoted to system-level reflections on the pandemic. The third block – with the largest number of articles – includes case studies that provide insights to the micro-level changes and challenges that became manifest in several aspects of our lives. These micro-trends unfold the manifold problems and challenges the pandemic caused in society, and thus offer insights to people's everyday life and struggles in this extreme period.

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3    Alexander & Smith (2020).
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Rogers Brubaker

# Paradoxes of populism during the pandemic[*]

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## Abstract

Populist protests against Coronavirus-related restrictions in the US appear paradoxical in three respects. Populism is generally hostile to expertise, yet it has flourished at a moment when expertise has seemed more indispensable than ever. Populism thrives on crisis and indeed often depends on fabricating a sense of crisis, yet it has accused mainstream politicians and media of overblowing and even inventing the Corona crisis. Populism, finally, is ordinarily protectionist, yet it has turned anti-protectionist during the pandemic and challenged the allegedly overprotective restrictions of the nanny-state. I address each apparent paradox in turn before speculating in conclusion about how populist distrust of expertise, antipathy to government regulation, and skepticism toward elite overprotectiveness may come together – in the context of intersecting medical, economic, political, and epistemic crises – in a potent and potentially dangerous mix.

**Keywords**: Covid-19, crisis, expertise, populism, protectionism

The initial wave of populist protests against the Corona lockdown in the US, already receding in mid-May as restrictive measures began to be lifted, was completely overtaken in June by the vastly larger wave of protest sparked by the killing of George Floyd. Yet just as the pandemic itself remains very much with us, despite the widespread desire to declare it over and get on with normal life, so too do the underlying tensions brought into focus by the spring anti-lockdown protests. These tensions – over expertise, crisis, and protection – are likely to loom even larger in the months ahead.

The protests against Corona restrictions, at first glance, appear paradoxical in three respects. Populism is generally hostile to expertise, yet it has flourished at a moment when people have been looking to scientists for tests, treatment, and vaccines, to public health professionals for guidance, and to medical experts for care. Populism thrives on crisis and indeed often depends on fabricating a sense of crisis, yet populist arguments have accused mainstream politicians and media of overblowing and even inventing the Corona crisis. Populism, finally, is ordinarily protectionist, yet it has turned anti-protectionist during the pandemic

and challenged the allegedly overprotective restrictions of the nanny-state. I address each apparent paradox in turn before speculating in conclusion about how populist distrust of expertise, antipathy to government regulation, and skepticism toward elite overprotectiveness may come together – in the context of intersecting medical, economic, political, and epistemic crises – in a potent and potentially dangerous mix.

A few clarifications and qualifications are in order. First, 'populism' may be too solid a word for what I will be discussing. It risks reifying what I prefer to think of as a discursive and stylistic repertoire, a set of tropes, gestures, and stances.[1] Second, in keeping with this understanding of populism, I do not discuss populist movements, parties, or leaders; I am concerned rather with a certain way of talking, a loose complex of tropes and gestures. Third, I will be concerned almost exclusively with the US. Some of my themes have parallels elsewhere, but much of my argument reflects the distinctiveness of the American experience of the pandemic and the distinctive salience of anti-intellectualism, libertarian anti-statism, and myths of self-reliance in American political culture. Lastly, although I focus on the US, I will not say much about Trump. I seek rather to characterize a broader current of populist discontent, though obviously one with which Trump has aligned himself at key moments and one to which he has given additional impetus.

### Expertise

I begin, then, with expertise. How could there be much room for populism, and specifically for its characteristic attacks on experts and expertise, at a moment when experts and expertise have seemed more indispensable than ever?[2]

The pandemic has obviously increased the demand for experts, not only as advisors to decision-makers but also as communicators to the public. It has dramatically increased the influence, the visibility, and the accessibility of virologists, infectious disease epidemiologists, and other public health experts. But precisely this influence, this visibility, and this accessibility have made that expertise vulnerable to populist attack.

The paradox of expertise, in short, is only an apparent paradox. Expertise is vulnerable to challenge and attack not in spite of it being indispensable but *because* it is indispensable – and because the stakes are so high. There is nothing new about this vulnerability. The inexorably

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1    I have argued elsewhere that populism is most fruitfully understood as a discursive and stylistic repertoire involving varying elaborations and permutations of a number of elements. The core element is the claim to speak and act in the name of 'the people', construed in a 'twofold opposition, at once vertical and horizontal, against "those on top" (and sometimes also "those on the bottom") on the one hand, and against an alien or threatening "outside" on the other, generally in such a way that economic, political, and cultural elites are represented as being "outside" – or at least different or "other" – as well as "on top." Other elements include majoritarianism, which asserts the interests, rights, and will of "the majority" against those of minorities (including those on the top, those on the bottom, and those on the margins); anti-institutionalism, which delegitimizes the complex workings of mediating institutions in the name of an ideology of immediacy, transparency, and directness; protectionism – economic, securitarian, or cultural – which claims to protect 'the people' against threats from above, from below, and from outside, threats that are often represented in the language of crisis; a communicational style that claims to favor plain speaking, common sense, and authenticity against intellectualism and political correctness; and antagonistic re-politicization, which claims to reassert democratic authority over depoliticized domains of social life' (I take this summary from Brubaker, 2020, p. 60; I develop the argument in greater detail in Brubaker, 2017a, pp. 360–367).

2    Populism is not consistently opposed to expertise per se. As an anti-institutional and anti-establishment political style, populism challenges experts and forms of expertise associated with the establishment and its institutions, while at the same time often appealing to counter-experts (Ylä-Anttila, 2018; Brandmayr, 2019; Schulman, 2020).

increasing 'scientization of politics,' as Gil Eyal (2019, p. 97) put it, necessarily brings in its train the 'politicization of science'. Expertise is continually called upon to help rationalize and legitimize policy decisions – decisions that necessarily 'advantage some groups and disadvantage others' (Eyal, 2020). In the present crisis, decisions justified with reference to expertise have devastated and existentially threatened some while merely inconveniencing others. So it's no surprise that expertise would come under attack.

The influence of epidemiologists has indeed been truly unprecedented. Never before, arguably, has so narrow a network of experts exerted so decisive and so incalculably far-reaching an effect on the course of world events, upending the lives of billions and plunging the world economy into its deepest crisis since the Great Depression.

The lockdowns initially enjoyed very broad public support, and restrictive measures still enjoyed the support of a substantial majority at least until early May (Washington Post-Ipsos, 2020). But as they moved through their second and into their third month, and as the medical emergency became less immediately and urgently threatening, these drastic measures – and the expert advice on which they were predicated – became an irresistible focal point for popular anger and frustration. That anger and frustration were overshadowed in June by the anger and frustration expressed in protests against police brutality and racism. But the anger and frustration about the lockdowns have not gone away, even as strict lockdown measures were relaxed – and they have indeed found new targets since the summer as new restrictions have been imposed in response to the surge in infections. In the context of an unprecedented economic crisis, the political significance of that anger and frustration is likely to increase rather than diminish, and 'the experts' – as well as the politicians who listened to them – are likely to be blamed for the economic carnage occasioned by the lockdowns.

Besides the extraordinarily concentrated, consequential, and visible influence of expertise, I want to highlight two additional factors. The first is the gap between what people know relatively directly from common sense and personal experience, and what people know *about* from expert models and projections. This epistemic gap gives rise to what I will call the *experiential* challenge to expertise. The second factor is the hyper-accessibility of expertise, which gives rise to a *participatory* challenge.

Consider first the experiential challenge. Populism tends to valorize common sense and concrete personal experience, and it tends to be suspicious of abstract and experience-distant forms of knowledge (Saurette & Gunster, 2011). It's easy to see how the Corona crisis has activated this suspicion. The extreme unevenness of the pandemic in geographic and social space has created a huge discrepancy between what many people have seen in their own local surroundings – few illnesses, fewer deaths, and empty hospitals, for example – and the dire picture reported from early hotspots or projected for the country as a whole. At the end of May, nearly half of America's approximately 3000 counties had not reported a single Covid-19 death, and 80% had reported fewer than 10 deaths.[3] Many residents of rural and small-town America – and even many residents of metropolitan America – could easily think that the crisis was overblown and the lockdown unnecessary.

The widely publicized disproportionate vulnerability of African Americans, Latinos, and Native Americans, of the urban poor, of the incarcerated, and of immigrant workers in meatpacking plants may reinforce the tacit or explicit sense, on the part of many residents

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3    Calculated from county-level data as of 28 May 2020, downloaded from https://usafacts.org/visualizations/coronavirus-covid-19-spread-map/. Even after the sharp increase in cases in rural areas in June and July, two-thirds of all counties had reported fewer than ten deaths (calculated from county-level data as of 9 August 2020).

of low-prevalence areas, that that this is not 'their' pandemic, but one that afflicts others.[4] Anti-lockdown protesters could easily draw, at least implicitly, on the longstanding and of course deeply racialized populist trope that contrasts the morally, politically, and even bio-medically healthy 'heartland' (Taggart, 2000, ch. 8) – the 'real' America of locally rooted communities and virtuous, hard-working ordinary citizens – with the big cities, seen as sites of corruption, criminality, and disease, and understood as dominated by liberal cosmopolitan elites on the one hand and by racial, ethnic, religious, sexual, and gender minorities on the other. The massive protests in cities across the country in late May and June – and especially the days during which police clashed with protesters, looting was widespread, and the National Guard was mobilized – no doubt made that trope even more accessible.

The virus has of course come to the heartland, and the summer and fall hotspots have been precisely in the heartland. But Covid-19 has come to the heartland in a manner very different from its dramatic spread in New York in late March and early April. In New York City, at the peak, estimates suggest that 15 per cent of the population may have been infected at the same time. At the peak of the summer surge in Arizona, Texas, and Florida, by contrast, about 5 per cent of the population may have been infected; and a higher fraction of those infected during the summer surge have been younger and less likely to be seriously ill. This has again created a gap between everyday experience – even in the hotspots, many people may not know anyone who has been seriously ill – and expert warnings (Silver, 2020).[5]

The epistemic gap between local experience and expert knowledge also has a temporal aspect. Epidemiological time is exponential time. Given an easily transmissible pathogen and a high effective reproduction number, a small outbreak can quickly become a disaster. The urgency of expert warnings and the case for the stringent distancing depended on this exponential temporality. Yet precisely because the warnings were taken seriously in March, they could become self-discrediting, since the lockdowns suspended exponential temporality, and the projected catastrophe never happened. This is what is sometimes called the paradox of prevention: measures taken to avert an outcome, if they are successful, can be seen in retrospect as having been unnecessary. The dire warnings had of course been conditional: *if* no steps were taken, *then* hospitals would be overwhelmed, and deaths would soar. But this is easily overlooked, whether intentionally or unintentionally. Here, too, the gap between local experience and expert projections has bred suspicion and distrust of expertise. This makes it harder for expert warnings to be taken seriously the second time around.

I turn now to the participatory challenge to expertise. Here expertise is challenged not on the terrain of everyday experience and common sense, but on the terrain of data. The participatory challenge feeds off the hyper-accessibility of expertise. By hyper-accessibility I don't of course mean that it is easy to acquire expertise, however that slippery term is defined. I mean

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4   The 'others' may be distant others, as in the 'we're not New York' comment; but they may also be proximate others. This was illustrated in early May by the offhand remark of the Wisconsin Supreme Court Chief Justice during arguments over the legality of the extension of the state's emergency 'Safer at Home' order. When an attorney for the governor, defending the extension of the order, noted the huge surge in cases in Brown County, the Chief Justice observed that the surge was 'due to the meatpacking, though… It wasn't just the regular folks in Brown County' (Flynn, 2020). The outbreaks had indeed burgeoned in Green Bay's meatpacking plants, where the workforce is composed disproportionately of immigrants, refugees, and other minorities. Apart from its offensiveness, the contrast between the meatpacking plants and 'regular folks' was medically disconcerting, overlooking the interdependence that is at the core of infectious disease epidemiology, at least for a disease as easily transmissible as Covid-19.

5   Estimates of those infected at peak moments are taken from https://covid19-projections.com/, as of 11 August 2020. The estimates are updated as new information becomes available; as a result, estimates of the numbers infected on these peak dates may change.

rather that, thanks to digital hyperconnectivity, expert opinions, expert models and projections, expert research, and expertise-relevant data are more accessible and more abundant than ever.

Experts have not simply advised governments; they have also been keen to address the public. They have sought to build support for disruptive distancing measures, but they have also sought to enlist the public in altering their behavior, and thereby in altering the course of the event they seek to model. Epidemiological knowledge, once it is communicated to the public, enters recursively into the socio-medical reality that epidemiological models seek to grasp. The remarkable career of the 'flatten the curve' meme is perhaps the most striking example.

Experts have addressed the public both directly, through op-ed contributions, interviews, podcasts, and Twitter posts, and indirectly, by talking extensively with journalists. Their views, along with journalists' simplifying accounts of those views, have then been recirculated at high velocity – though often of course in fragmented and distorted form – by legions of digitally active lay users.

But it is not only expert opinions that are hyper-accessible; it is also the raw materials on the basis of which expert opinions are formed and revised: the projections, the research findings, and the public health data. There is an enormous glut of data and research findings. Numerous tracking projects convey daily updates and trends on cases, deaths, tests, and hospitalizations. Many of these allow users to download the raw data, so data-sophisticated users can easily explore the data on their own. Equally accessible are the numerous forecasting undertakings, which seek to predict future trajectories of cases, deaths, and hospitalizations. And voluminous streams of new research are freely accessible on preprint servers – not only published work, but also (indeed primarily, in this context) papers that have not yet been peer-reviewed. Already by early May, about 3000 papers on Covid-19 had been posted on bioRxiv and medRxiv (Kwon, 2020), and several not yet peer-reviewed papers have been drawn into public debates in highly contentious ways (Heimstädt, 2020; Bajak & Howe, 2020).

I want to underscore two implications of the hyper-accessibility and superabundance of Covid-related expertise, research, and data. One is the proliferation of the means of *assessing* expertise. For what is accessible in the digital public sphere – or what appears to be accessible – is not only the content of expert opinion but also the evidence that supports or undermines it. It's easy to find data or new research that can be taken (or of course mistaken) as suggesting, or even 'proving', as some would claim, that 'the experts' got it wrong in this way or that. For example, it's easy to cite research and numbers that suggest that Covid-19 is much less dangerous than 'the experts' claimed, indeed no more dangerous than the seasonal flu. And it's easy, therefore, to claim that the lockdown was a catastrophic mistake – the 'greatest mistake in history', as one commentator rather grandly put it (Prager, 2020). Yet the hyper-accessibility and super-abundance of expertise and research also make it easy to come to what is in a sense the opposite (and equally problematic) conclusion: that 'the experts' don't agree on anything. In both respects, hyper-accessibility and superabundance can contribute to undermining the credibility of expertise.[6]

The second implication is the ease of *claiming and exercising* expertise, or at least some kind of quasi-expertise. Semi-experts, quasi-experts, pseudo-experts, and lay experts have proliferated. And even if it's not easy to claim expertise per se, it's at least easy to claim the right

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6    The hyper-accessibility of expertise also makes it easy to track sharp shifts in expert opinion on such matters as the seriousness of the threat, the appropriateness of travel restrictions, and the importance of masks. This too can weaken the credibility of experts (Shulman, 2020). In the case of masks, it's not so much that expert opinion shifted dramatically as that public health messaging was appallingly paternalistic, confusing, and counterproductive (Tufekci, 2020).

to join in, as a knowledgeable participant, in the collective public effort to interpret and define socio-medical reality. As prominent lockdown skeptic Aaron Ginn (2020), a self-described Silicon Valley 'growth hacker', put it, 'I'm quite experienced at understanding virality, how things grow, and data ... Data is data. Our focus here isn't treatments but numbers. You don't need a special degree to understand what the data says and doesn't say. Numbers are universal.'

Ginn's epistemologically populist claim to a seat at the table did not go unchallenged. His essay contesting the case for the lockdown racked up more than 2.5 million views on Medium in 24 hours, but it was removed by the platform after a scathing critique from a prominent biologist (Bergstrom, 2020). This was one of many interventions to have been 'invisibilized' by major platforms. Concerns have been mounting in recent years about the proliferation of misinformation and disinformation in the structurally flat, unmediated, and in that sense populist digital public sphere (Brubaker, 2017a), in which visibility is driven by algorithmically amplified popularity (Gillespie, 2016). Those concerns have intensified during the pandemic. In response, major platforms have been aggressively removing or flagging content deemed potentially harmful from a public health standpoint. But aggressive and highly visible content moderation – would-be readers or viewers are confronted with messages like 'this post is under investigation or was found in violation of the Medium Rules' or 'this video has been removed for violating YouTube's Community Guidelines' – has raised concerns about censorship and generated an epistemologically populist backlash. The removal of Ginn's essay, for example, prompted a *Wall Street Journal* article (Finley, 2020) that raised Ginn's profile among lockdown skeptics, who could complain with good reason – at least in the early phase of the lockdown – that major digital platforms were colluding in restricting the range of what they deemed to be legitimate views.

The participatory challenge to expertise – part of a broader 'participatory turn' in politics, culture, and society (Mede & Schäfer, 2020, pp. 5–6) – is not new. It has roots in long-term developments in the cultural politics of knowledge. These include the decline of what might be called epistemic deference; the long-standing suspicion of insular forms of expert judgment; the valorization of various forms of lay expertise (Epstein, 1995; Callon, 1999; Prior, 2003); and the growing sense – especially in health and lifestyle domains – that people must educate themselves and take responsibility for arbitrating between competing expert claims (Reich, 2016). But the pandemic and the flood of data it has unleashed have given a major new impetus to this participatory challenge and further destabilized expertise.

The crisis of expertise is systemic and long-standing. It results not only from the participatory challenge, but also from the unavoidable politicization of expertise that follows from its pervasive implication in regulatory decision-making that invariably has redistributive consequences (Eyal, 2019, p. 97). Yet beyond this chronic crisis of expertise – if the oxymoron is allowed – Covid-19 confronts us with a more specific epistemic crisis, a crisis of public knowledge (Brubaker, 2017a).

It is not only that 'normal science' cannot cope with a situation in which 'facts are uncertain, stakes high, values in dispute and decisions urgent' (Waltner-Toews et al., 2020). It is also that we inhabit radically different public worlds. The public worlds we inhabit are constituted in significant part by what we know or believe about them. And what we know or believe about Covid-19 – not only about what should be done, but about what is the case – is radically discrepant. There is no shared definition of the situation. Is Covid-19 'the greatest existential threat in our lifetimes' (New York Times Editorial Board, 2020), or is it no more dangerous than a bad flu season? Did the lockdowns save more than 3 million lives in Europe (Achenbach & Meckler, 2020)? Or were they not only medically ineffective and economically catastrophic

but likely to have disastrous health consequences, especially in poor countries, disrupting vaccination programs and possibly even tipping already vulnerable populations into mass starvation (Gorvett, 2020)? Is a targeted strategy of protecting the vulnerable while allowing others to resume normal life the best way of minimizing mortality and social harm, as proposed in the Great Barrington Declaration (Kulldorff et al., 2020)? Or would adopting this strategy be tantamount to 'mass murder', as one critic not too subtly argued on CNN (Barry, 2020)?

## Crisis

I turn now, much more briefly, to crisis. Populism thrives on crisis, even depends on crisis. Yet crises are not pre-given; they are made, construed, and performed. 'Crisis' is not a neutral category of social analysis; it is a category of social and political practice, mobilized to do specific political work. The rhetoric of 'crisis' serves as a bid for attention, a marker of urgency, a claim that extraordinary times require extraordinary measures. Populists do not simply respond to pre-existing crises; they seek rather to cultivate, exacerbate, or even create a sense of crisis, casting the crisis as one that they alone have the power to resolve. Crisis is therefore not prior to and independent of populist politics; rather, performances of crisis are often a central *part* of populist politics (Moffitt, 2016; Stavrakakis et al., 2018) – though not of course of populist politics alone. By invoking, performing, intensifying, and dramatizing crisis, populist and other political actors contribute to *producing* the very crises to which they claim to *respond.* Yet the pandemic has occasioned a curious reversal. It is now populists who have been accusing mainstream politicians and media – and of course public health experts as well – of blowing the Corona crisis out of all proportion or even of creating it as a crisis. It's true that some populist leaders in power – including notably Hungary's Viktor Orbán, Serbia's Aleksandr Vučić´, and India's Narendra Modi (Jaffrelot & Martelli, 2020) – have embraced the rhetoric of crisis and used it to justify emergency measures that have tightened their authoritarian grip on power. In opposition, however, the dominant populist tendency has been to downplay the seriousness of the pandemic and to turn the tables by accusing incumbents – in the American context, primarily Democratic state governors, who have taken the strongest steps to restrict activities in the name of public health – of exploiting or inventing the Corona crisis in order to illegitimately expand state power, suspend rights, and deepen surveillance. (Some populists in power have also downplayed the seriousness of the pandemic, most notoriously Brazil's Jair Bolsonaro (Lasco, 2020), though Trump and some others have done so as well, if not so consistently.)

The paradox, then, is that instead of performing crisis, as is generally the case, populism has seemed here to be performing non-crisis, performing normality in the face of an establishment in full crisis mode. But the paradox is again only apparent. Populists *have* in fact been seeking to capitalize on crisis. But the crisis on which they have been seeking to capitalize is the economic crisis, not the medical crisis. And because of the unevenness of the pandemic, the economic crisis has seemed much more threatening to many people than the medical crisis.

Anti-lockdown protesters also sought to stage and provoke a political crisis. The emergency regulations issuing from the overblown medical crisis, in their view, created a genuine political crisis. This was cast as a crisis of governmental overreach that trampled on fundamental rights, including the right to work, the right to open one's business, the right to move in public space, the right to free exercise of religion, the right to bear arms, the right to protest (Abrams & Langford, 2020), the right to privacy, and the right not to wear a mask (Finn, 2020; Parshley, 2020). Protesters, some of them armed, freely invoked the language of tyranny and

appealed to constitutional rights (Beckett, 2020; Chabria, 2020; Fernandez & Montgomery, 2020). The staging of this crisis, among other things, provided a golden opportunity for the violently anti-government Boogaloo movement, which seized on the fiercely anti-government animus of the anti-lockdown protests – and which has subsequently, if improbably, sought to seize on the protests against police brutality as well – in order to move out of the shadows and recruit new followers (Evans & Wilson, 2020; Kunzelman, 2020).

The progressive easing of the spring lockdown weakened protesters' efforts to provoke a political crisis along these lines. And the political crisis they sought to provoke was overtaken in June by another, broader political crisis. But the two crises are not unrelated, and the new crisis has in some ways hardened the anti-government stance that animated the populist effort to stage a crisis of government overreach. Anger at continuing restrictions on church services, for example – restrictions that were upheld by the Supreme Court at the end of May, as the protest wave was gathering force (Liptak, 2020) – was reinforced by the spectacle of huge crowds marching in the streets (Shrier, 2020).

**Protection**

I turn finally to the paradox of protection. We think of populism as protectionist. In recent years this has meant claiming to protect 'the people' – economically, demographically, culturally, and physically – from threats arising from unchecked globalization, the neoliberal economy, open borders, and cosmopolitan culture, all seen as favored by economic, political, and cultural elites (Brubaker, 2017b).

Yet faced with the Coronavirus, populism has been *anti*-protectionist. Populists have taken the side of openness against closure, and they have challenged what they see as the overprotective nanny state. They have cast the lockdowns as hysterical overreactions, criticized paths to reopening as overcautious, and sometimes challenged social distancing protocols as unnecessary.

The paradox is heightened by the fact that conservatives (and American anti-lockdown protesters, unlike their counterparts in the first wave of anti-lockdown protests in Germany, have been overwhelmingly conservative) generally tend to be more sensitive than liberals to signs of threat and danger, including 'threat[s] of germs and contamination' (Haidt, 2013, p. 279; Klein, 2020). And indeed early in the pandemic, when the virus was perceived as an outside threat, conservative and far-right figures had taken the lead in pressuring Trump to ban travel from China, at a time when liberals and public health officials questioned that measure (Thielking & Facher, 2020).

One might argue that the paradox of protection, like the others, is only an apparent paradox. One might argue, for example, that the populism of lockdown opponents has indeed been protectionist, but that it has focused on protecting livelihoods and liberties rather than lives. But I don't think this is quite right. The demand to restore individual liberties, in the context of emergency restrictions, is a libertarian argument; I don't think it can plausibly be characterized as protectionist. Economic demands *could* be framed in protectionist terms, for example as a demand for state action to protect jobs, or to protect people from losing their health insurance or from being evicted from their homes. But this argument has not been made by anti-lockdown protesters.

So I think there is a real paradox here, or at least a puzzle. Why has populism turned anti-protectionist during the pandemic? Part of the answer, I think, is that populism – unlike socialism, liberalism, or conservativism – is not a substantive political ideology. It is substan-

tively empty. Populism is relational and oppositional, defined by what it opposes. What it opposes is formally always the same – it is always anti-elite, always anti-establishment – but substantively variable, depending on how the opposition between 'the people' and 'the elite' or 'the establishment' is constructed (Canovan, 1999).

Populism in the Global North has indeed been strongly protectionist in recent decades. This made political sense in a context of hyper-globalization and hegemonic neoliberalism, in which economic, political, and cultural elites could plausibly be seen as indifferent to the bounded solidarities of community and nation. But today there is no political profit in a protectionist critique of the status quo, since closed borders, re-nationalization, and de-globalization *are* the status quo.

But if populism could not at present take a distinctively protectionist stance vis-a`-vis the outside world, since the protectionist space was already occupied, it *could* take a distinctively *anti*-protectionist stance vis-a`-vis the domestic protectionist regime. The regime of protection has been characterized in populist terms as a project of political, cognitive, public health, mainstream media, and professional elites. These elites – so runs the critique – have been at most inconvenienced by the regime of protection. They can work from home, and they continue to draw their salaries. They can afford the luxury of hyper-protection; they can afford to minimize the risk of contagion at the expense of everything else.

On this account, 'the people' cannot afford the luxury of lockdown-level hyper-protection. But the populist claim is also that 'the people' don't need or want this degree of protection. Gendered imagery, which is often central to populism (Löffler et al., 2020), comes into play here as well. 'The people' are seen as tough, resilient, brave, and willing to take risks, the elite as soft, coddled, anxious, oversensitive, and risk-averse. Gender symbolism is also central to the cultural politics of masks (Glick, 2020), though of course the performance of unmasked virility forgets that masks are much less about protecting oneself than about protecting others.

Protectionist elites have also been resented during the pandemic for their moralizing, scolding, and school-teacherish stance. They have been cast in populist terms as all too eager to lecture ordinary people about how they should behave and all too ready to reprimand them for their selfish heedlessness of others when they have violated social distancing guidelines. Since protectionist elites have invoked the authority of science, the sudden pivot of many in June to applauding mass protests and minimizing their public health risks – or justifying those risks by appealing to a greater good – was easily seen by populists as undermining their authority and credibility. The pivot was especially disorienting when it was made by public health experts, as in the open letter signed by a large group of public health and infectious disease professionals, arguing that 'as public health advocates, we do not condemn these gatherings as risky for Covid-19 transmission' but rather 'support them as vital to the national public health and to the threatened health specifically of Black people in the United States' (Diamond, 2020; Palus, 2020).[7]

Populist skepticism of Corona-protectionism aligns with a broader popular skepticism of what is seen as elite overprotectiveness in culture, education, and everyday life. This is a skepticism toward what one prominent book (Lukianoff and Haidt, 2018) has called 'safetyism', referring to the efforts of anxious parents to protect their children from even the most minimal risks and to the demand for 'safe spaces' and for the protection of students' feelings, in American universities. Populist opposition to Corona protectionism may have drawn some of its energy from this broader current of skepticism.

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7    The open letter can be found at https://drive.google.com/file/d/1Jyfn4Wd2i6bRi12ePghMHtX3ys1b7K1A/view

## Conclusion

The pandemic has not generated a coherent or large-scale populist response. But the spring lockdowns and the ongoing restrictions on activities have created a reservoir of popular anger, and they have fostered the emergence of a populist mood among substantial parts of the population. They have heightened distrust of expertise, exacerbated antipathy to intrusive government regulation, and amplified skepticism toward elite overprotectiveness.

Critics of Corona restrictions have sought to bring together these forms of proto-populist discontent in a counter-narrative according to which misguided and out-of-touch experts, power-hungry regulators, and excessively risk-averse elites have combined to wreck the economy, destroy livelihoods, and trample on liberties. This narrative has found considerable traction online, but it has not (yet) gained broad public support. Substantial majorities, for example, continue to favor mask requirements and are more concerned about controlling the virus than about resuming unimpeded economic activity.

Still, the present moment remains fraught, not least because the dynamics of medical, economic, political, and epistemic crises interpenetrate in complex and largely unforeseeable ways. The future course of the pandemic, for example, itself depends on many complexly interacting processes. Among these (in addition to the development of treatments and vaccines, themselves deeply drawn into partisan political struggles) are what people believe or know about the pandemic, and how they act on that knowledge – whether they wear masks, for example, and whether and how they practice physical distancing – as well as what decisions are taken about modalities and timing of reopening. But what people believe or know about the pandemic is shaped by chaotic and shifting public messaging, embedded in a polarized media ecosystem, and colored by the challenges to expertise that I have described. And how they act depends not only on what they think or know but also on social pressures and expectations in their immediate environment. Decisions about modalities and timing of reopening, for their part, respond both to contested knowledge about the dynamics of the pandemic and to political pressures generated by the economic crisis and filtered through the prism of hyper-polarized partisan politics.

As a result of these and other interacting processes, the curve of new infections turned sharply upward in June and July and has recently been rising again. This has generated new claims to knowledge and new pressures for action. But these knowledge claims remain deeply contested and beset with deep uncertainty. They yield no unambiguous and uncontested guidelines for action. The crisis of expertise has continued to deepen, as has the political crisis over how to respond to the pandemic, in the context of an approaching election and of massive political pressure on public health agencies like the Center for Disease Control and the Food and Drug Administration. And this of course only begins to scratch the surface of the complex interpenetration of medical, economic, political, and epistemic crises. We should not complacently assume that the past is a good guide to the future. We are truly in uncharted territory.

## Acknowledgements

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Zsolt Boda

# Paradoxes of populism in the pandemic and beyond: A commentary on Rogers Brubaker's essay[*]

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## 1. Introduction

In a thoughtful essay, Rogers Brubaker points to the paradoxes of populism unveiled by the pandemic: populists' difficult relationship with expertise; their challenge of facing a crisis which was not created by them; and their new anti-protectionist feelings that were generated by the alleged overprotectedness of government measures. I certainly agree with him that the pandemic effectively challenged populism, and this is probably the main reason why the COVID-19 crisis, as Brubaker put it, 'has not generated a coherent or large-scale populist response' – which could have been expected. After all, populists are supposed to capitalize on crises and, being mostly in opposition, they can easily criticize mainstream politics. Although we cannot say that the pandemic would have swept away populism, it is certainly true that the popularity of populist parties is not soaring. Therefore, I believe Brubaker's point is valid and the pandemic posed a real challenge to populists.

In the following, I will not argue against Brubaker, but try to add nuance to his arguments. Rather than depicting populists as caught in paradoxical stances vis-à-vis the COVID-19 crisis, I would underline the ambiguity and lack of coherence in their reactions. Since Brubaker mostly focuses on American populism, I will bring in some evidence and examples from Europe. In the second part of this essay, I will use populism's pandemic-related paradoxes as a stepping stone to remind the reader of the essentially paradoxical nature of populism. Although the term has been in use in political science for several decades now, it is still debated whether the label populist is analytically clear, and whether it makes sense at all. Without wishing to review the already huge and ever-growing populism literature and revisit the arguments for and against the usage of the term, I will point to those paradoxical features of populism which certainly contribute to its perceived ambiguity.

## 2. Populisms and the pandemic

'The pandemic has not generated a coherent or large-scale populist response. But the lockdowns have created a reservoir of popular anger, and they have fostered the emergence of a populist mood among substantial parts of the population. They have heightened distrust of

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expertise, exacerbated antipathy to intrusive government regulation, and amplified skepticism toward elite overprotectiveness' – argues Brubaker. I will come back to the first sentence of the quote later. Let us now have a look at the second part of it: how populist sentiments have been spurred by the pandemic. Since the COVID-19 crisis has, understandably, created a number of uncertainties and questions concerning the origins, the nature and consequences of the illness, and the measures required to combat it, health experts have found themselves at the very focus of public interest and debate. One would have expected a populist backlash against the advent of expert-centered discussions and policy making. And to some extent this indeed happened: anti-mask, anti-lockdown protests have been organized across both the US and Europe; anti-vaccination messages and claims casting doubt on the severity of the disease spread fast on social media. Eberl et al. (2020) found a statistically significant – although rather weak – positive association between faith in COVID-19 conspiracy theories and populist attitudes.

However, these are the voices of a minority, although a not negligible minority. International polls show that the coronavirus is the most important concern of people around the globe, more so than unemployment and poverty.[1] True, discontent with how governments are handling the crisis has grown in many countries, and trust in international health organizations has also shrunk; but this is not the sign of a general anti-elite sentiment, since public confidence in doctors and healthcare workers has increased over the past year.[2] Even the supporters of populist parties acknowledge the related scientific and medical expertise (Michel, 2021).

Therefore, it is indeed difficult to say that we are witnessing a general surge in populist sentiment. On the contrary: Schraff (2020) argues that the collective angst caused by the pandemic generated a 'rally-around-the-flag' effect and increased diffuse support for political institutions. This is not to deny the existence of COVID-related populist sentiment: again, non-negligible parts of society have developed radical attitudes and beliefs about the pandemic, some of which have culminated in conspiracy theories, and these opinions are not harmless. They inform the behavior of people (Stecula & Pickup, 2021) and certainly contribute to uncertainty and hesitation concerning vaccines. International surveys demonstrate that, although the majority of respondents are favorably inclined towards anti-COVID-19 vaccinations, and only a small minority are against vaccines in general, many people are still worried about side effects and are therefore hesitant to be vaccinated. Also, one in three people say they have seen or heard messages discouraging the public from getting a COVID-19 vaccine.[3] Even if only a fraction of the population uphold the craziest conspiracy theories about vaccines, the latter create the ground for more subtly formulated doubts, uncertainties, and perceptions of risk surrounding the rapidly developed new vaccines, and these doubts affect many more people than the members of the hardcore sects.

Interestingly, data show that general populist attitudes are not necessarily incompatible with taking the pandemic seriously. In an international online survey,[4] we inquired into people's attitudes and emotions concerning the pandemic, and our analysis (in progress) suggests that elements of the populism scale show different types of association with compliance-related attitudes concerning COVID-related measures. For instance, a belief in general

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1    https://www.ipsos.com/en/what-worries-world-january-2021
2    https://www.ipsos.com/en/covid-19-one-year-global-public-loses-confidence-institutions
3    https://www.ipsos.com/en/attitudes-covid-19-vaccines
4    The survey was developed by Agneta Fischer and David Abadi (University of Amsterdam) for the DEMOS project. The survey was executed in May 2020 in Germany, Hungary, the Netherlands, Spain and the UK.

conspiracy theories is negatively associated with compliance only in Germany – and has no effect in the remaining countries. More interestingly, populist attitudes have a positive effect on compliance attitudes in each of the studied countries. Populist scales have been in use for more than a decade now, and although different versions exist (see Castanho Silva et al. 2020) they all seek to operationalize populism as a 'thin-centered ideology' (Mudde, 2004) and to capture attitudes of people-centeredness, anti-elitism, and a Manichean outlook on social conflict. Our data show that those who agree more with statements like 'Politicians have to spend time among ordinary people to do a good job,' 'I think politicians usually do not reveal their true motives,' or 'You can tell if someone is a good or a bad person if you know their political views,' more strongly uphold measures about social distancing, mask wearing, etc.

Similarly, studying the compliance attitudes of supporters of populist parties in five European countries, Michel (2020) also found that the attitudes of populist voters concerning compliance with health measures, while otherwise more critical and distrustful of the government, are just as strong as those of the rest of the population. All these results are further illustrations that support Brubaker's point: populism has not generated a coherent response to the pandemic. The populist attitudes of the general public – at least in Europe – do not predict a rejection of safety measures, and some of the related attitudes even seem to have a positive effect on compliance.

In this sense, we should rather talk about populisms in the plural than about populism. While some segments of the population have developed populist sentiments consisting of distrust of the government, anti-elitism, and even hard-core conspiracy thinking, people with stronger-than-average populist attitudes do not necessarily downplay the severity of the crisis and may even be among the most compliant citizens, according to our data.

The same applies to populist actors. A volume edited by Bobba and Hubé (2021) presents the different strategies of European populist parties and politicians as they reacted to, and tried to capitalize on, the pandemic. The conclusion is that these strategies varied between countries and changed over time. Some of these variations and changes were dictated by the nature of the situation: populists in power obviously faced different challenges than those in opposition; the first phase of the pandemic created everywhere a need for national unity, thus populist parties in opposition also voted for necessary measures, but later they tried to come up with their own messages and criticisms of the government. These variations and changes are easy to understand and seem logical: the actual political situation and the actual context of the pandemic obviously generate different answers across countries.

However, other variations and changes seem to be more contingent and show that, instead of being frozen in a paradoxical relationship with expertise, the nature of the crisis, and protectionism, European populist parties and politicians conveyed ambiguous and contradictory messages about these issues.

For instance, some populist politicians even criticized their governments for not being strict enough and not taking experts' warning seriously enough: this was the case, for instance, with Geert Wilders and the Freedom Party in the Netherlands, and Marine Le Pen of the National Rally in France.[5] Wilders even cited WHO experts – allying oneself with supranational expert organizations is quite an unusual move from a populist. In Greece the left-populist Syriza, despite being in opposition, publicly endorsed the government's expert, Prof. Tsiodras. Some incumbent populists took strict lockdown measures in the initial phase of the

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5    The source of this and the following information on populist politicians' reactions is the written and on-line press.

pandemic, like Orbán in Hungary, Erdogan in Turkey, and the PiS in Poland. These discourses and measures nicely illustrate the populist expert-paradox put forth by Brubaker: the fact that the pandemic forced populists to give up their anti-elitism, at least vis-à-vis medical experts.

However, the paradox did not prevail consistently, as some populists did not sustain their anti-expertise positions: e.g. in France, Jean-Luc Mélanchon, leader of the populist party Rebellious France, criticized on several occasions the 'omniscience of experts.' Mélanchon, together with Marine Le Pen, also supported a French doctor who first started to advertise chloroquine as a cure, portraying him as a victim of the mainstream medical elite. In Hungary, although experts seem to have informed governmental measures, especially during the first wave of the pandemic, politics became increasingly reluctant to respect expertise. This critical attitude manifested itself both in decisions (e.g. the use of the Chinese vaccine Sinopharm was authorized by the Foreign Minister, not the drug administration authority), and in political communication. PM Orbán himself has been actively communicating, and from the fall of 2020 he started to distance himself from medical experts. People in uniform were always present at the regular press conferences of the operative body, symbolizing the militarization of the crisis. True, the press conferences were led by Cecilia Müller, Chief Medical Officer, but she does not look like the normal caricature of an expert figure; her appearance and communication style resemble that of a stereotypical grandmother. Her colloquial communication style and the vernacular expressions she used earned both sympathy and mockery in public, and she became the subject of many internet memes. Whether she was successful at reaching the population is another question – my point is simply that she fitted into the pandemic-related symbolism employed by the Hungarian government in which expertise did not play a prominent role.

All in all, populist politicians have manifested varied, changing, and sometime clearly paradoxical attitudes towards expertise in Europe too.

Concerning the nature of the crisis, Brubaker argues that populists were surprised by the pandemic as a crisis which had not been created or dominated by them. Therefore, although they usually build on and thrive in times of crises, populists downplayed the medical crisis. Later, they tried to capitalize on the social crisis caused not so much by the illness, but by poor governmental decision-making.

Again the picture is a bit more blurred in Europe. Populists in power, like Orbán or Erdogan, refrained from overemphasizing the crisis, but this was not a coherent pattern: in Spain Podemos, instead of downplaying the seriousness of the pandemic, used it as an opportunity to advance its health policy agenda. As shown above, populists in opposition often took up a strict stance regarding the pandemic, criticizing their governments for not taking it seriously enough. A common technique used by several right-wing populists (such as Marine Le Pen and Matteo Salvini) was to trying to aggrandize the crisis, presenting it as a dangerous manifestation and consequence of immigration and neoliberal globalization. In this interpretive frame, the pandemic appears as the first horseman of the coming Apocalypse, fueled by liberalism, globalization, and the free movement of people.

At the same time, Brubaker is right in stressing that populists tried to capitalize on the social crisis unfolding from the enduring lockdowns. At some point, Geert Wilders in the Netherlands changed position, and instead of criticizing the government for the inadequacy of its health measures complained about the disastrous consequences of social restrictions. In a similar vein, Salvini in Italy has been vacillating between criticizing the government for too many and not enough lockdowns.

Finally, let us look at the problem of protectionism. Brubaker points to the paradox of the usually overprotective populists becoming libertarian when faced with government restrictions on individual freedom. Similar reactions occurred in Europe as well: in France, Mélanchon warned against 'the lockdown of democracy'; in the Netherlands, Wilders and Baudet switched to a more liberal approach as early as in April 2020 and started to criticize the government for the 'unnecessary' lockdown measures. In Spain, the right-wing populist party Vox raised similar concerns, and in Germany AfD attacked the government for being authoritarian.

However, anti-protectionism was selective and focused mostly on internal lockdown regulations. Right-wing populists, like the French National Rally and the German AfD, stressed the need to protect people and the nation; used the pandemic to advance their anti-globalization and anti-Europe arguments; and embraced enthusiastically the closure of borders as a measure they had been advocating for a long time. On the left, and in power, Podemos advanced the nationalization of private hospitals, which can also be interpreted as a protectionist governmental measure.

To sum up: the paradoxes of populism identified by Brubaker in the American context have been present in Europe as well, but perhaps in a more ambiguous way. The anti-expertise stance of populists manifested itself, but it has not become a dominant discourse; populist politicians repeatedly downplayed the severity of the medical crisis and indeed focused more on the social crisis, but we cannot say that they denied the sheer existence of the pandemic; populists have increasingly voiced anti-protectionist opinions, but in other areas they maintained and even stressed their protectionist attitudes. The pandemic did indeed pose a challenge to populism because it is difficult to interpret it in a populist frame – unless one dives deep into lunatic conspiracy theories, which are by definition anti-elite, thus essentially populist.

## 3. The paradoxical nature of populism

However, it is worth recalling that the populist phenomenon is full of paradoxes, ambiguity, and contingencies in any case. The approach most generally used to conceptualize populism – the ideational one – defines it as a "thin-centered ideology" without a clear ideological and programmatic core that expresses a moralizing Manichean worldview and considers society to be separated into two homogeneous and essentially antagonistic groups ('the pure people' and 'the corrupt elite'), and argues that politics should be an expression of the *volonté générale* of the people (Mudde, 2004). That is, populism is a kind of ideology which cannot be located on the widely used map of ideologies, as it can be oriented towards the left or the right. This is why, in Spain, both Podemos and Vox are generally defined as populist parties, despite the fact that their ideologies, policy proposals, and communication styles differ substantially. It is easy to understand why some wonder whether the label is meaningful at all, and why others propose that the term should be used with more caution (e.g. DeCleen & Gylos, 2021).

But the paradoxes and ambiguities of populism do not stop at its uncertain ideological profile. Populism speaks on behalf of the people and criticizes the elite; however, populist movements and parties are typically organized around an influential leader with undisputed authority – as many examples, from Juan Domingo Perón, Charles de Gaulle, to Silvio Berlusconi, Donald Trump, and Viktor Orbán, illustrate. Moreover, these leaders are generally part of the economic, political, or cultural elite – the very same elite about which they raise criticism, play the victim of, or both.

Populism also has an ambiguous relationship with democracy. Some argue that populism is a deeply democratic phenomenon because it speaks on behalf of the 'common people' and expresses dissatisfaction with the ruling establishment, norms, and politics. For instance, Canovan (1999) argues that populism is a necessary 'redemptive' face of democracy, and that the 'legitimacy of democracy as a pragmatic system [...] always leaves room for populism that accompanies democracy like a shadow' (Canovan, 1999, p. 16). The democratic potential of populism is more than a theoretical claim, as some populist movements – for instance, in Latin America – have indeed strengthened democracy through filling an existing representation gap, while others promote more participative decision-making models, as the Italian Five Stars Movement does. Based on these examples and similar evidence, Mudde and Rowira Kaltwasser (2013) assign some positive democratic effects to populism, chiefly in terms of filling the representation gap, reinvigorating popular rule, and politically mobilizing people.

At the same time, although they criticize representative democracy and generally uphold the case of direct democracy, an analysis of democratic reforms across countries found that populist radical-right parties have not played a leading role in these – to the contrary (Bedock, 2021). Such parties have not achieved – and seldom did they even try – reform of the system of party funding and the institutions of democratic decision making. Conversely, populists in power often support illiberal reforms which erode basic democratic norms, like those of free and fair elections, the division of powers, or media freedom. In fact, it is generally accepted that populism has an antagonistic relationship with the institutional and normative complexity of liberal democracy. First, populism is antithetical to pluralism: while the latter allows or even expects different interests and ideologies to be present in society and politics, the former posits a homogenous people (Mudde, 2004). Therefore, populist politics has a tendency to become exclusionary and intolerant, rejecting any compromise. Second, populist politics is generally based on the direct relationship of the leader with their followers, as well as the direct translation of popular will into decisions. This runs counter to the logic of liberal democracy with its complex institutional machinery (Bartha et al., 2020). Third, the protection of human rights and minority interests clashes with the idea of supreme popular sovereignty advanced by populism (Alston, 2017).

That is, populism has a paradoxical and ambiguous relationship to democracy, and this is reflected in both the political practice of populist political actors and the attitudes of their supporters. While some studies argue that populist voters have stronger authoritarian attitudes (e.g. Dunn, 2015), other studies have found that although people with populist attitudes are dissatisfied with existing democratic practices, they support democracy in general – or at least they do not support it less than the general population does (Zaslove & Meijers, 2021). True, they are also less supportive of some liberal institutions and causes (courts controlling governments, and minority rights), as well as political parties than the rest – however, they uphold very strongly the need for media freedom and direct democracy (referenda).

Finally, let me point to another paradox of populism concerning socio-political polarization. The paradox stems from the contradiction between the populist discourse concerning the unified and homogenous people on one hand, and the polarizing potential of populism on the other.

The roots of populism are manifold, but it seems that social division is among them: there is overwhelming evidence of the role of socio-economic problems, like marginalization, joblessness and inequality, in fueling populist sentiment. Burgoon et al. (2018) argue that positional deprivation and inequality increase support for radical-right populist parties. In the

DEMOS project[6] we found that a lack of activation policies and the exclusion of a significant proportion of young people from the labor market clearly feed populist attitudes. That is, populism often recommends itself as solution for social division – at least voters perceive it this way. However, there is no systemic evidence that populism can reduce social inequalities; on the contrary, right-wing populism leads to growing income gaps in society (Guriev & Papaioannou, 2020). A dramatic illustration of this point is that during the 2016 US presidential election Donald Trump 'over-performed' most in counties associated with poor health conditions and the highest drug, alcohol, and suicide-related mortality rates – factors strongly linked to economic distress, while his own political program and pledges offered little to those in need.[7]

While populism feeds on social division and talks about a unified and homogenous people, in reality it often increases not only socio-economic but political divides as well, being one of the forces behind polarization (Schulze et al., 2020; Somer et al., 2020) The populist concept of the homogenous people is contrasted with the enemies of the latter: first and foremost, elite groups like old political elites (the 'Washington swamp'), banks, and financial institutions, or the European Union. But supposed internal allies might also be easily targeted by populist politics, conducive to the effective division and polarization of the polity. Venezuela is a clear example of this, where the populism of Chavez caused the extreme political division of the country and led it to the verge of a civil war – and total economic breakdown.

To sum up, the populist phenomenon exhibits a number of paradoxes and ambiguities, including the prominent role of leaders versus its declared people-centrism; its malleable, diverse and blurred ideological profile; its controversial stance vis-à-vis democracy; and its paradoxical relationship with social division and polarization. The paradoxes of populism concerning the pandemic observed and identified by Brubaker are maybe nothing more than the actual and context-related manifestations of populism's inherent controversies and ambiguities. The conclusion might be that we can expect further paradoxes and ambiguities every time populism – with its diverse and ambivalent nature – is confronted with new social problems and challenges. If Mudde (2004) is right, and we are living in a 'populist Zeitgeist,' we can expect populism to be around for a while and to offer frames and discourses for the interpretation of new challenges; but we can also expect these frames and discourses to remain just as controversial and paradoxical as they have been so far.

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6   See at https://demos-h2020.eu/en/

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## 1. Introduction

The Covid-19 pandemic created an extraordinarily challenging environment for people to make sense of the world. As the coronavirus was spreading in devastating ways, fundamental institutional weaknesses were exposed even in well-endowed welfare democracies. The credibility of governments was tested as healthcare systems were placed under immense pressure, and authoritative medical expertise itself appeared to be collapsing. Public health officials who had rarely been in the limelight were brought to the center of public attention and scrutiny, and their expertise became viewed as political – tied to the political interests of the regime that hired them or of political groups that wanted to undermine incumbents.

The uncertainties communicated in expert messaging reflected the realities of the learning process among medical professionals, but the lack of clarity deepened public distrust in the competence of public officials. The vulnerabilities magnified by the pandemic exaggerated ordinary people's perceptions of being left alone in the dark by the very people whose job it was to identify problems and resolve them. This environment became an ideal setting for populism to thrive. After all, the essence of populism is a claim by its speakers that they stand for 'the people' against untrustworthy elites. The global pandemic heightened the need for competent and credible elites, and it also amplified the challenges elites faced in reaching the bar of competence and credibility. There is arguably no better time for populism to flourish than in an era of global pandemic that creates a complex set of interconnected crises.

The theme of populism already featured prominently in academic and public discussions before the Covid-19 crisis. The American Political Science Association (APSA) had designated 'Populism and Privilege' as the theme of the association's 2019 annual meeting. APSA is the largest professional organization in the field of political science, with over eleven thousand members in more than a hundred countries. The theme statement posted in 2018 for the 2019 annual meeting declared, 'No recent political development has been more striking than the rise to power of self-identified populist movements around the globe, whose main unifying trait is their claim to champion "the people" against entrenched selfish "elites." […] These surging populist movements have transformed politics within nations and across nations, so they have become central to research in every political science subfield' (APSA, 2018). Much of the attention in the rapidly expanding literature written before the pandemic focused on populist leaders and their partisans. The focus was predominantly on the way autocratic-leaning leaders used a combination of anti-establishment and nationalist discourse to mobilize disenchanted electorates. Studies showed how politicians used populism to gain political power

and, once they became incumbents, to solidify and entrench their power against political challengers – usually by invoking some major crisis against which only they could protect their nation (Bieber, 2020). The social dimension of populist mobilization, involving questions about why people join different kinds of anti-elite and anti-establishment events, received less attention by comparison.

The anti-establishment protests that occurred during the coronavirus crisis revealed the need for a better understanding of the social dimension of populism. These protests expressed the depth of frustration and anger about socioeconomic inequalities. They also exposed the magnitude and mobilizational power of the disconnect between the experiences and knowledge of ordinary people and those of elites. The visibility of this gap became a major driver of anti-establishment frustration and anger during the coronavirus pandemic. The protests resulting from it have challenged scholars to look more closely and critically at the way we think about populism, and to clarify the lens we are applying to events and movements that look like populism (because they are anti-establishment) but may defy mainstream notions about it.

Rogers Brubaker took up the challenge in his recently published essay, 'Paradoxes of Populism During the Pandemic,' by initiating a discussion about what lessons we can learn about populism from the 2020 coronavirus anti-restriction protests in the United States (Brubaker, 2020). Since the 1990s, Brubaker has published pioneering work on social theory, always focusing on big questions and calling on scholars to think critically about their theoretical and analytical tools. In this essay, he explores the uses of populism during the pandemic – broadly understood as 'a discursive and stylistic repertoire;' a 'certain way of talking, a loose complex of tropes and gestures' (p. 74). He presents his account through an analysis that unpacks what at first glance might appear to be three paradoxes in the populism displayed by the 2020 anti-lockdown protests in the US: *the paradox of expertise; the paradox of crisis; and the paradox of protection.* According to conventional expectations, he explains, populism is hostile to expertise, dependent on crisis, and protectionist. Yet the Covid-19 anti-restriction protests happened at a time when people actively sought guidance from scientists and medical experts; and protesters mobilized not for but against those who spoke about crisis and the need for protection.

As the essay unravels each of these paradoxes, we find out that two of the three (the paradox of expertise and the paradox of crisis) are only seemingly paradoxical to mainstream expectations, and the third (the paradox of protectionism) may be a uniquely American paradox. We might be tempted to conclude that the primary takeaway from Brubaker's analysis is a negative answer to the question of whether the coronavirus anti-restriction protests provide new knowledge about populism. His findings reaffirm the mainstream notion that populism is an anti-elite and anti-establishment stance without ideological content, and they also confirm expectations about the centrality of crisis in populist discourse.

Along the way, however, Brubaker's analysis expands the analytical scope of the populism lens. He directs attention to the significance of the social dimension (complementing a currently predominant focus on populist political leaders, elites, and parties), highlights the significance of the *epistemic gap* between the experiences and knowledge of ordinary people and elites (which has received little attention in populism literature), and introduces concepts for the understanding of epistemic populism that have significant comparative value. My commentary will focus on these contributions.

## 2. The populist challenge to expertise: Creating alternative knowledge

The analysis begins by describing the extraordinary and unprecedented influence of medical experts during the Covid-19 crisis on the lives of billions around the world and presenting this intense public engagement with expertise as a 'paradox of expertise.' Brubaker explains that this is only an 'apparent paradox,' because 'precisely this influence, this visibility, and this accessibility have made that expertise vulnerable to populist attack' (p. 74). I would go further, however, and question the usefulness of the idea of paradox altogether in this case: If populism is expected to be hostile to expertise, then public attacks against experts meet that expectation. (A paradoxical situation might have emerged if anti-lockdown populists had supported medical experts.)

The strength of the essay's contribution becomes more visible if we focus on Brubaker's substantive discussion about the crisis of expertise. The essay provides a compelling account of the way the pandemic crystallized populist challenge against expertise. The epistemic gap between the opinion of medical experts (which formed the basis of lockdown measures) and the everyday experiences of people (whose livelihoods were affected by the lockdowns) generated strong populist challenge to expertise. The populism literature provides little guidance about this dimension of anti-establishment protests, and Brubaker's essay offers helpful analytical concepts. It describes how the crisis of expertise generated a combination of 'experiential challenge' and 'participatory challenge.' An experiential challenge was triggered by the epistemic gap between local experience and expert knowledge, and a participatory challenge was built on an abundance and wide availability of expertise-relevant data that ordinary people could access, assess, interpret, and communicate with each other.

The concepts of 'experiential challenge' and 'participatory challenge' to expertise have strong analytical value. Although Brubaker carefully acknowledges the limitations of the generalizability of his observations (which focus specifically on the 2020 anti-lockdown protests in the US), I find it useful to apply his concepts comparatively within the US. I will explore the applicability of the concepts of experiential and participatory challenge to anti-racism protests occurring in the same environment during the pandemic. It was not coincidental that anti-racism protests intensified and broadened during the Covid-19 pandemic. The pandemic exposed the way marginalized and resourceless populations (racialized minorities, the urban poor, the incarcerated, etc.) become even more vulnerable at times of complex social crisis. Thus, the protests against coronavirus restrictions and the anti-racist 'Black Lives Matter' (BLM) movement became two faces of anti-establishment mobilization during the coronavirus crisis.

The experiential and participatory challenge became prominent in both anti-lockdown and anti-racism protests, but the anti-establishment stances presented by anti-lockdown protesters differed substantively from those displayed in BLM protests. Anti-lockdown protesters spoke against the authority of experts who told them what to do (e.g., wear masks, maintain physical distance, and close their shops), limiting their perceived entitlement to free movement and enterprise. These protesters challenged the credibility of the data coming from experts. They populated alternative information spaces where they created and exchanged alternative knowledge and theories about elite conspiracies.

Arguably, the Black Lives Matter protests presented an even stronger experiential challenge to establishment institutions, though the challenge was not aimed specifically at medical expertise. The 2020 BLM protests were triggered by a specific event: a widely circulating video about the killing of a Black man, George Floyd, by a policeman in Minneapolis. The anger and

frustration voiced by these protests, however, spoke not only about police brutality but about deeply entrenched systemic racism in establishment institutions that embody a general gap in credible knowledge about and disregard for Black experiences. An important reason why the BLM protests gained multiracial and international support was that the video created an experience for viewers of witnessing the killing in person. The wide availability of the video expanded the discursive space for speaking about the sources and consequences of the epistemic gap between Black and non-Black experiences in the US and elsewhere. Beyond voicing an experiential challenge, BLM protesters also expressed a strong participatory challenge. They voiced demand for Black actors to participate in transforming establishment institutions in a way that integrates knowledge about Black experiences – from police forces to institutions directly engaged in creating and communicating knowledge, from schools to universities and research institutions, art institutions, and so on.

### 3. The populist challenge to crisis management: Staging a counter-crisis

The second paradox described in the essay focuses on what the coronavirus anti-restriction protests have revealed about the role of crisis in populism. In Brubaker's words, 'instead of performing crisis, as is generally the case, populism has seemed here to be performing non-crisis, performing normality in the face of an establishment in full crisis mode' (p. 79). He explains, however, that this is only an apparent paradox: In fact, anti-lockdown protesters capitalized on crisis. They countered the discourse about the medical crisis with a discourse about a more fundamental economic and political crisis: the crisis of individual freedoms and rights. Beyond the particularities of oppression during lockdowns (i.e., the right to move freely in public spaces without masks), these protests spoke about violations of basic rights, such as the right to engage in economic enterprise, practice one's religion, and bear arms. They expressed political crisis in anti-government language that resonated among those who held libertarian or anti-progressive attitudes, and they energized a significant protest wave across the US.

Thus, Brubaker's analysis confirms that crisis is central to populism, but it also highlights populism's counter-establishment performative dimension. The anti-lockdown protests displayed how populists actively stage crises that fit their agendas. Although significant public crises might objectively be present around them, populists will choose to deny, exaggerate, and create crisis according to their political interests. The selective instrumentalization of crisis has also been described in other literature on populism (including studies cited in the essay), but Brubaker's account opens possibilities for analyzing what we might call a *populist counter-crisis*. Although he does not work with this concept, he provides insights into the mobilizing power of an alternative crisis that was staged successfully by populists in the face of a massive public health crisis they chose to deny; one that has claimed the lives of hundreds of thousands in the US and millions around the world.

The essay does not address the role of actors, but it is important to point out that the mobilizational aspect of an alternative crisis discourse cannot be understood without discussing the role of leadership. In the US, anti-lockdown protesters found an interested ally in former President Trump, a leader with an extraordinary capacity to communicate alternative crises to his followers. Although coronavirus anti-restriction protests were fundamentally anti-government, they did make an exception for Trump's idea of government intervention to suppress an alleged law-and-order crisis created by the BLM protests. (The role of Trump's leadership in

galvanizing this segment of the anti-establishment constituency through an alternative crisis discourse became even more evident during the last weeks of his presidency, culminating in the January 6 attack on the US Capital.)

A comparative look at the 2020 anti-racism protests is helpful if we want to understand the role of crisis in different kinds of populist mobilization. In this respect, too, anti-lockdown and anti-racism protests diverged substantively in the US, although both movements spoke about a major crisis. On the one side, anti-restriction protesters performed normality about the coronavirus and staged a political crisis about governmental overreach. On the other side, BLM protesters did not perform normality but wanted to transform the institutional status quo. The crisis BLM protests staged was not a counter-crisis that denied the coronavirus crisis. Instead, these protests spoke about systemic racism as a crisis that had been consequential for a long time but became more visible during the pandemic.

## 4. American populism: Does individualism trump social protection?

The third paradox explored in the essay is the anti-protectionism of the 2020 coronavirus anti-restriction protests. Brubaker explains that this displays a real paradox, 'or at least a puzzle,' about populism (p. 81). Populists are expected to be protectionists, yet these anti-lockdown protests staged strong opposition to measures that governments introduced to protect people from the pandemic. The charge that these policies violated individual freedoms was part of the political crisis these protests performed. Yet the protesters also spoke about an economic crisis resulting from the lockdowns, and in that context their lack of interest in government protection from economic losses was indeed puzzling. The US is a country where medical care is extremely expensive, and job loss easily results in loss of access to healthcare.

Brubaker's analysis of this puzzle points to anti-protectionist elements in American political culture that reinforce the anti-elite skepticism of anti-lockdown populists, which involves even disdain for soft and risk-averse elites living in a world separated from the people (p. 81). This (gendered) image of a tough and brave American may be seen as only an exaggerated version of populism's ordinary person standing against corrupt elites. But the picture of a strong man standing against soft elites expresses something stereotypically American about these protests: an individualistic stance that centers on self-reliance and resists notions of shared responsibility and social protection. (In another expression of this face of populism, research suggests that gun buying went up significantly in the US during the pandemic; see Tavernise, 2021.) In this regard, Brubaker's general disclaimer about the generalizability of his observations has substantive relevance. Yet his focus on the cultural context of anti-protectionism in the US protests has comparative value. It directs attention to the role of socialization into a particular political culture as a source of substantive differences between populists living in diverse settings.

To probe the question about substantive differences rooted in socialization, it is again helpful to look through a comparative lens within the US at the anti-racism protests that happened during the pandemic. Here, too, the anti-restriction protests and the BLM protests diverged significantly. While anti-restriction protesters spoke in libertarian language against the protection imposed by the nanny-state (with the previously mentioned exception of government intervention to suppress the BLM protests), the BLM protesters sought protection against police brutality and against the economic and social consequences of systemic racism.

They spoke about the need for government not to retreat but to transform itself, take account of Black experiences, protect Black lives, and create equal life chances.

Thus, the populism lens employed in this essay expands the analytical possibility to explore variations in anti-elite and anti-establishment mobilization. Although Brubaker's focus is specifically on the 2020 coronavirus anti-restriction protests in the US, and he emphasizes the limitations of generalizing from this case, the analytical concepts introduced in this essay are valuable for comparative research within the US and beyond. Nonetheless, important questions remain about how much breadth and depth the populism lens enables in social science research. Populism is an easily applicable framework for describing the basic tension underlying political mobilization – between those who speak for 'the people' against establishment elites and institutions. The Covid-19 pandemic created an unprecedented opportunity for scholars and ordinary people to see and act upon this tension. It exposed gaps between elites and publics in tangible ways, and it triggered multiple, sometimes conflicting, anti-establishment protests. If we want to advance the general understanding about these events beyond identifying the basic tension they are expressing, however, the conceptual repertoire of populism needs to expand. It needs to provide analytical tools that make the populism lens useful in ways that complement the conceptual repertoire offered in the rich literature on contentious politics (Tarrow, 2011). Brubaker's essay helps to expand populism's analytical repertoire in an important domain by exploring the credibility of elites engaged in knowledge production.

## 5. Populism as a lens for exploring the credibility of knowledge

Brubaker's focus on the epistemic dimension of populism draws attention to an area of major significance that has received relatively little attention in this literature. Questions about what counts as credible knowledge and what roles experts and social actors play in creating it have been integral to academic and public discussions for a long time. In the social sciences, debates about methodology have centered on these questions for decades. Similar discussions are present in other fields involving human subjects, including medical research. The coronavirus pandemic exposed the broader salience of these questions with unprecedented intensity, and it has also shed light on the difficulties of turning expertise into a credible source of public policy.

When experts become public figures associated with political establishments, expertise becomes politicized. Politicized expertise, in turn, becomes up for grabs in political competition. Among other dangers, public distrust of expertise can weaken the ability of scientific institutions to contribute to the welfare of societies. Moreover, autocratic leaders can capitalize on public distrust to justify political control over scientific institutions. Brubaker's essay closes on a pessimistic note about the unpredictability of the direction in which these processes involving populist challenge are evolving. He also questions the relevance of past experiences in making sense of 'the complex interpenetration of medical, economic, political, and epistemic crises' (p. 83). There is, however, an upside to the contention over the credibility of expertise. The intensity of public interest in scientific knowledge provides an opportunity for creating a better balance and a smaller divide between elite and public knowledge.

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Domonkos Sik & Ildikó Zakariás

# The field of solidarity in times of a pandemic: Results of an online survey in Hungary[*]

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## Abstract

Despite its central importance, solidarity is seldom analysed in a comprehensive manner. Most related studies target only specific aspects of its complex mechanisms, such as the functioning of redistributive systems, the private networks and practices of care, or civil society. Our study aims at providing a comprehensive analysis by understanding solidarity as a field in Bourdieu's sense: involving supportive interactions; competition for the related symbolic capital; *illusio* that provides legitimate frames of deservingness and respectability; and habitus depending on the broader structural position. To understand the contemporary solidarity field of Hungary, these dimensions are mapped all at once in a unified framework: types of problems and needs of individuals; sources and perceptions of received support; types of support provided to family members and friends; and finally, types of support provided to generalised others – these factors constitute the dimensions of a cluster analysis that describes ideal-typical positions. The positions are analysed from the perspective of their structural background and the related attitudes. From a sociological perspective, situations like the pandemic provide a unique opportunity for analysing otherwise tacit patterns of solidarity. Besides this opportunity, the pandemic is also used as a comparative framework: in the final section, the changes occurring in the various positions are also overviewed to highlight the dynamics of the solidarity field.

**Keywords:** solidarity; COVID-19; Hungary; Bourdieu

## 1. Introduction

Solidarity is one of the main integrative forces in society: the related interpretations and praxes outline legitimate requests to others; they define the responsibilities that ground 'moral economies'; and they determine technologies of intervention associated with various forms of social support. In most cases, the meanings and praxes related to solidarity are embedded in the lifeworld, thus they organise social interactions in a naturalised manner (Habermas, 1984). However, in extraordinary times characterised by the intensification or overburdening of the

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networks and institutions of social support, the naturalised patterns of solidarity cease to be taken for granted: legitimate needs are contested; moral responsibilities are debated; interventions are reconfigured. The impact of a pandemic can be understood from this perspective: solidarity networks are set in motion and individual reflection on the related meanings intensifies, while previously latent conflicts become manifest. From a sociological perspective, situations like this provide a unique opportunity for analysing otherwise tacit patterns of solidarity.

Based on these presumptions, in our survey an attempt is made to explore those values, motivations, and strategies that ground the interpretations of deservingness and responsibility while organizing supportive interactions. The parallel analysis of support provided and received and the structural positions and relevant attitudes outlines the Hungarian 'field of solidarity' in a Bourdieusian sense. Such a model – elaborated through a cluster analysis – reveals not only the various positions characterised by divergent, often conflicting interests and attributions, but also the potential field dynamics generated by the pandemic. Our analysis is constituted of five steps. First, the social theoretical background is outlined by answering two questions: in what sense can we talk about solidarity as a field, and how is it affected by the structural transformations of late modernity? Second, the Hungarian context is introduced: What are the specificities of the local solidarity field, with Central Europe as a reference? Third, data and methods are introduced briefly. In the fourth section, the ideal-typical positions of the solidarity field are elaborated and described according to their structural and attitudinal features. Finally, based on these positions an attempt at theorizing is made: the interrelatedness of the positions is mapped in order to describe the field dynamics generated by the pandemic.

## 2. Solidarity as a field

Solidarity is a peculiar notion; its many connotations leave researchers perplexed. Various uses of solidarity may emphasize its social theoretical (integration), moral philosophical (part of justice), political (a means of handling unjust constellations), or social policy (welfare state) aspects (Bayertz, 1999). Furthermore, it is not only analytically heterogeneous, but also surrounded by actual public debate: in the extraordinary times when the principles of solidarity become relevant, previously latent conflicts may sharpen and crystallize around such concepts. In this sense, solidarity as a form of recognition implies struggles in the public sphere (Honneth, 1996). These basic features could serve as references when it comes to conceptualising solidarity: on the one hand, it can be grasped through supportive interactions that become manifest in times of crisis; on the other hand, beyond cooperative interaction it also includes conflict. According to these premises, the complex patterns of solidarity can be ideally analysed among 'liminal' conditions (Thomassen, 2014), or in times of crisis (Habermas 1975). Also, solidarity can be understood according to models that combine the ambivalent tendencies of normative support (cooperation) and moral competition (conflict).

To grasp the complexity of solidarity, a social theoretical framework is needed that can conceptualize its many aspects, while also grounding an empirical analysis. Such a framework is provided by Bourdieu's *field theory*. Fields are social structures defined by symbolic and material capitals. To get involved in a certain field, an actor must approve its *illusio,* which outlines a specific set of common values and the rules of acquisition (Bourdieu, 1998). In this sense, fields are integrated by shared tacit knowledge about what is 'worthy' and how value can be accumulated. However, integration does not only imply cooperation: acquiring symbolic and

material capitals may often become a zero-sum game. Actors move on trajectories defined by 'objective interests' that originate from their – former, present, and anticipated – positions in various fields. This is ensured by a set of dispositions incorporated as *habitus* (Bourdieu, 1990). Even if the habitus encompasses aspirations, desires, bodily attunement, automatic behaviour and unintentional communicative patterns as well, it should not be viewed as deterministic (as it is often criticised for being: e.g. Jenkins, 1992). As actors are involved in various parallel fields throughout their lives, their habitus are shaped by unique patterns of structural constraints, which result in stable but not unchangeable dispositions (Bourdieu, 1984). Illusio is also a dynamic notion: while outlining a common set of rules, actors continuously compete for interpretative privileges. Those who are in an elite position intentionally or unintentionally adjust the rules of field struggle to their interest. Beside these inner dynamics, the fields are also dynamized by external factors. While the coexistence of various autonomous fields is the benchmark of modern societies, it does not mean that field boundaries are necessarily secure. As the expansion of the political or the economic field indicates, capitals of power or money may violate the independence of specific fields such as the science or the arts. In this sense, fields are dynamic entities, continuously forced to secure their boundaries that are stretched by internal and external impacts (Bourdieu & Wacquant, 1992).

While Bourdieu did not implement field theory on solidarity, his conceptual tools provide a unique opportunity to create a comprehensive and coherent framework. To understand solidarity as a field, those specific symbolic capitals and illusio need to be highlighted that integrate it as an autonomous space of action, while also embedding it in the broader context of complementary fields. For this purpose, a preliminary historic overview is needed, so that the late modern structural constituents of the solidarity field may be grasped.

The history of solidarity is inseparable from the long-term processes of functional differentiation. While in pre-modern constellations the criteria of worthiness, moral responsibilities, and praxes of support were embedded in family and local community relations (including feudal ties), modern solidarity operates according to the logic of social security. As expert institutions – managed by the state – take over the supportive tasks of the community, the extent and content of social help becomes linked to political struggles (Castel, 2002). The most mature form of this paradigm is represented by the welfare state, which is facing various challenges in late modernity. On the economic level, the system of social security is being undermined by unemployment (Castel, 2009) and by an emerging global capitalism that limits the agency of nation states (Castells, 2010). On the political level, the construction of solidarity is burdened with value and legitimacy crises, as expressed by the deterioration of the quality of the public sphere (Davis, 2020) that is embedded in the platforms of an information society that undermines communicative rationality (Lash 2002); by the emergence of populist nationalism (Muis & Immerzeel, 2017) that is sharpening social tensions and narratives of exclusion and xenophobia (Linke & Smith, 2009); and by the controversies associated with the media construction of suffering (Boltanski, 1999; Chouliaraki, 2013). On the level of expert knowledge that organizes institutional solidarity praxes, a dual crisis arises: on the one hand, the objectifying gaze of 'biopolitical' institutions threaten with alienated and objectifying supportive interactions (Rose, 1999, Dubet, 2002); on the other hand, criticism of expert authority originating from risk society (Beck, 1992) threatens through the relativization of any approved forms of knowledge, resulting in a post-truth constellation (van der Linden & Löfstedt, 2019). On the level of actors, solidarity is undermined by new, precarious forms of inequality that further fragment group identity and collective responsibility (Standing, 2012), and the new trends of individualization that limit actors' horizons to aesthetic reflexivity (Lash, 1999) and

the consuming of outstanding experiences (Schulze, 2008; Micheletti, 2003). Taken together, these tendencies weaken the classical modern paradigm of solidarity, which is based on the inclusive ideals of the welfare state. Consequently, falling out of the web of social security maintained by expert institutions is becoming not only a realistic possibility for many, but also a fear, thus transforming the collective horizon of expectations. Such change affects the state, civil society, and private actors alike: the actual experiences of the dysfunctionalities and gaps in welfare solidarity undermine the legitimacy of the system in general. These historical constraints outline the space of the potential of solidarity as an autonomous field.

To talk about solidarity as a field, its specific symbolic capital first needs to be described based on the above-described historical context. The symbolic capital of solidarity is twofold: on the one hand, it concerns the merit of being supported by others – that is, deservingness; on the other hand, it concerns the recognition given to those who provide support; that is, moral respectability. While in the premodern era deservingness and respectability were embedded in the context of a community-based everyday morality, the emergence of state social security systems enabled the birth of an autonomous field. Deservingness and respectability have become a distinct area of discursive battle as the circle of the included and the extent of services depend on ever-changing state regulations (Castel, 2002).

On the one hand, various social groups have attempted to prove their worthiness in the public sphere. The stake of these discursive exchanges was differentiation between the decent, thus supportable, and the self-defeating, thus ignorable poor (e.g. van Oorschot, 2000; Hofmann et al., 2019). On the other hand, the positions of providing support also implied symbolic battles: the criteria of appropriate and counterproductive support have been contested both in philanthropic (Maclean et al., 2015) and expert circles (Chambon et al., 1999). These symbolic battles aimed at different goals: acquiring deservingness as symbolic capital enables the needy to access more resources and support, while acquiring respectability as symbolic capital equips the supporter with moral supremacy. At the same time, these battles took place on a common platform: namely, through supportive interactions.

Solidarity is primarily performed in those interactions in which actors in need and/or supporters are involved.[1] Such interactions are motivated by personal interests on the one hand, and normative or moral principles on the other (potentially, though not necessarily, in conflict with personal interests). These sources of motivation are embedded in personal and collective interpretations closely tied to discourses of worthiness, responsibility, and adequacy. Accordingly, these interpretations are related to various structural positions indicated by the relevant symbolic capitals and the broader context of material and cultural capitals. During acts of solidarity, not only are interpretations renewed (or reinforced), but symbolic and material forms of capital are also exchanged. Furthermore, these transactions are followed by competition for discursive dominance among various positions: while actors follow strategies that express their reflected and habitual interests, they also reproduce the framework of the solidarity field.

According to the overviewed diagnoses of times, the contemporary solidarity field is characterised by fundamental contingencies. Due to transformations affecting the state, the political sphere, expert institutions, NGOs and subjects, the basis of both deservingness and respectability becomes highly contested. Such inner instability is complemented with external structural uncertainty that threatens the autonomy of the field of solidarity: 'managerialism' or 'neoliberalism' are just two of the most obvious examples of how the administrative

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1    This analytical distinction is needed to also take into consideration those cases in which a needy situation remains unsupported, or support targets non-existent or misunderstood needs.

or economic fields enforces their functionality on supportive interactions (Timor-Shlevin & Benjamin, 2021). Due to these external impacts, the illusio of the solidarity field also loses its intactness: the rules of acquiring deservingness or respectability may be overwritten by external field logics of either economic efficiency, or political nepotism.

To understand the pandemic as a source of crisis, this already controversial constellation should be taken into consideration as a general context. As health-related, economic, social and political challenges generated by the pandemic are addressed by the already contested actors of the field of solidarity, not only does the uncertainty of deservingness and respectability become more explicit, but so do the critical or evasive strategies of everyday actors. In order to have a more nuanced picture of the general constituents of the Hungarian field of solidarity, those pieces of empirical research have to be reviewed that analyse the local features of the above-mentioned dimensions.

## 3. The solidarity field in Hungary

Most related studies on solidarity target only specific aspects of these complex mechanisms, such as the functioning of redistributive systems; related values; private networks of care; or civil society.[2] Even if such studies do not provide a comprehensive picture of the solidarity field (as they neglect the interrelatedness of its various components), they are essential for contextualising the Hungarian case.

When it comes to comparing the welfare states of Europe, policy studies usually differentiate five major clusters: Mediterranean countries (e.g. Italy, Spain); small European states (e.g. Luxembourg); the old European countries (e.g. Germany, France); and Central (e.g. Hungary) and Eastern European (e.g. Ukraine) countries. Based on indicators such as income inequality; percentage of temporary contracts; gender ratio of unemployment; government expenditure; and social contributions as a share of GDP, Central European countries are characterised by less extensive welfare institutions compared to the old and Mediterranean ones, and more comprehensive ones compared to those of Eastern Europe (Lauzadyte-Tutliene et al., 2018). Besides these macro characteristics, the Hungarian welfare model has gone through fundamental transformations recently, expressed most explicitly by constitutional changes. While the state of social rights in Hungary has been contested by many since the post-socialist transition (Ferge, 2012), it was the new Fundamental Law of Hungary that explicitly declared a transition to a workfare state (Juhász, 2015). The consequent social politics combines pragmatic (strengthening the middle class) and ideological (differentiating between worthy and unworthy social groups) elements, while applying selective praxes (Szikra, 2019; Kremer, 2017). As a consequence of replacing unemployment benefits and reintegration projects with a comprehensive public employment programme, the unemployed have a greater chance of getting stuck in a deprived position (Scharle & Szikra, 2015). Also, such social politics lead to the underfinancing of educational, health care, and social work institutions (Czibere et al., 2017).

Values related to solidarity are characterised by stark East–West differences among European states: on the one hand, the citizens of Central and East European countries tend to prefer greater state responsibility for welfare measures; on the other hand, they tend to be less satisfied with the actual efficiency of their welfare institutions (Svallfors, 2012). However, that does not

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2    Of course, there are some exceptions, such as a complex comparative analysis of solidarity in Europe that covers both the social-spatial aspect and the deservingness of needy groups. According to this comparison (based on a survey made in 2017), Hungary shows a consistently lower level of solidarity than the EU average (Halman & Sieben, 2021).

imply some form of inevitable 'learned helplessness' or 'unreflected egalitarianism,' often attributed to *homo sovieticus*. These paradoxical attitude patterns are rather the consequence of a historical path of modernization that combines authoritarianism with egalitarian social transformation (Ferge, 2008). Nevertheless, the Hungarian patterns of trust in others and in institutions, and in support for values related to private or public solidarity, are equally below the European averages (Giczi & Sik, 2009). These characteristics severely limit the emergence of supportive networks in various ways. On a general level, Hungarian social networks are traditional in the sense that family relations play a more decisive role compared to friendships (Albert & Dávid, 2018). Consequently, social support – which is supposed to be provided primarily by the paternalistic, yet in many regards dysfunctional state – mostly burdens family ties, especially females (Gregor & Kováts, 2018). Private support networks also directly reflect structural inequalities, instead of complementing the missing material capital with a social one (Albert & Hajdú, 2016). Furthermore, altruism is considered to be a rare phenomenon even in the case of family ties: the potential for receiving help is strongly dependent on the capability of providing support – a bias implying patrimonial solidarity ties (Utasi, 2013, pp. 43–46).

The contemporary patterns of civil society are shaped by institutional forces congruous throughout Central Europe. After the transition, civil organizations were mainly financed externally by global and EU funds, which affected their goals and priorities. The joining of the EU reconfigured this constellation: as the former external financers gradually withdrew their support, national governments stepped forward. While civil organisations previously were considered by political actors to be promoters of both democratization and solidarity, nationalist-populist governments – especially in Poland and Hungary – started to view them as 'foreign agents' illegitimately contesting their authority (Meyer et al., 2020). These tendencies have placed the already weak and loosely embedded civil organisations in a precarious position (Kuti, 2016). Besides these institutional and political constraints, the recruiting of activists also remains a contingency. Even if the number of activists and the areas covered by them have both increased since the transition, their structural background has remained the same. Participation in civil society is still the privilege of actors capable of accessing above-average material and cultural capital (Czike & Kuti, 2006, p. 17; Gerő & Hajdú, 2015). Consequently, civil support remains a hierarchical interaction, wherein the perspective of those in need is often neglected (Zakariás, 2018).

Based on this short review of literature, it may seem that the Hungarian field of solidarity is burdened with the general distortions of late modernity, amplified by local dysfunctions. The paradigm of the welfare state was built up reluctantly in Central Europe and was openly replaced in Hungary by the paradigm of the workfare state; already weakened values of solidarity are openly being defied by the proudly illiberal-nationalist government; actors in already precarious positions are faced with the inadequacy of state support, mistrust, and traditional-patriarchal private networks of support; while NGOs already marginalised by biopolitical authority are explicitly persecuted. On the one hand, it may be argued that the symbolic battle for deservingness is particularly sharp-edged in Hungary: as state policy differentiates between worthy and unworthy citizens, those who are excluded either find alternative supportive networks, or are faced with being completely ignored. On the other hand, it may be argued that the symbolic battle for respectability has been emptied out: as the social security sector is greatly underfinanced and NGOs are politically persecuted, providing support barely generates symbolic capital of its own. Due to these tendencies, the illusio of the solidarity field loses its autonomy: the chances of economic (i.e. managerialism) and political take-over (i.e. nepotism) equally increase.

The first wave of the pandemic affected such a solidarity field, already burdened with severe challenges. Thus, its crisis potential is extreme: as state institutions already weakened by a chronic lack of resources are burdened with extra tasks, the intensification of pre-existing selective tendencies becomes probable; as the proportion of those who have access to poorer quality services (or no service at all) grows, the general experience of dysfunctionality increases, which may undermine the legitimacy of expert institutions; furthermore, the already weakened values of solidarity and the poor democratic quality of the public sphere may result in sharpening social conflict and in the growing neglect and exclusion of minority groups. Our empirical research aims at mapping the impact of the pandemic on such a solidarity field – the following section summarises the details of the analysis.

## 4. Research design

Despite the above-discussed tendencies, it may not be argued that the Hungarian field of solidarity is on a predetermined track, whereby agency is limited to individual escapist strategies or complete helplessness. As structural constraints affect actors differently, mapping the actual positions within the field of solidarity characterised by various patterns of needs and support remains an empirical question. In order to provide a comprehensive analysis of the field of solidarity, three limitations of previous research need to be overcome: (1) being both a potential recipient as well as providing support should be included in the analysis; (2) various substantive aspects that are the content of needs and support should be regarded in parallel (e.g. health related, psychological, and ultimately, material ones); (3) various institutional dimensions of solidarity should be included in the model (that is, besides private, individual action, state and civil society institutional actors as well). As the symbolic battles of deservingness and respectability are ultimately fought in everyday symbolic interactions, research aimed at mapping the post-pandemic field of solidarity needs to focus on this level.

Based on these presumptions, field analysis was designed. As a first step, various structural positions were described within the field of solidarity based on the parallel analysis of the experiences of being in need, being supported, providing care, and helping generalised others. In the second step, the related habitus was characterised based on the broader structural background (demographic, material, and cultural variables). In the third step, the various readings of illusio were explored according to attitudes related to the political sphere, the exclusivity of deservingness, and the attributions of social responsibility. By assembling these elements, a way opens up for drawing some theoretical conclusions concerning the potential field dynamics. In what follows, this theoretical design is translated to the operationalized level of empirical analysis.

Our research is based on an online survey (n=800), with a sample representing the adult Hungarian population according to gender, age group, region and educational attainment.[3] The questionnaires were filled out in July 2020 (data were collected by Inspira Research Ltd.).

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3  While such a dataset has certain advantages (i.e. it permits representative insight), it also has shortcomings, which need to be reflected on. The first limitation concerns the nature of quantitative data: while it allows for the identification of various structural positions, it lacks the hermeneutic depth required for the appropriate characterisation of illusio and habitus. The second limitation concerns the online platform: while the sample was representative, it is well-known that the most deprived groups are more difficult to reach online. The third limitation concerns the biases of self-administered surveys: the desire to construct a normatively more acceptable picture potentially affected respondents of varying social background to a different extent. While these limitations could not have been prevented in a systematic manner, they should be mentioned in order to avoid the over-generalisation of conclusions.

First, variables expressing the positions in the field of solidarity were aggregated into continuous variables (the exact process is described in Table 2). The following six variables were constructed: types of problems and needs since the pandemic (health, psychological, financial, care); sources of received support (family, friends, state, civil sector); experience related to support received; types of support provided to family members (health, psychological, financial, care); types of support provided to friends (health, psychological, financial, care); types of support provided to generalised others; and last, the state of being informed about support that is provided.

Second, these aggregated variables were standardized, and a K-means cluster analysis was undertaken. Based on the interpretability and the distribution of cases in each cluster, the five-category model was chosen as the optimal classification. Table 1 shows the results of this analysis. In order to provide a more realistic picture, instead of the standardized values, the cluster centres are represented by the original values so that they can be interpreted as descriptive indicators, not just relative indicators.[4] When it comes to interpreting the clusters, it is important to emphasize that they express ideal types, which are constructed by enlarging the positive or negative statistical differences from the average. On the level of real types, patterns are usually more heterogeneous and inconsistent. This should be kept in our mind when reading the distribution of clusters: they do not express estimations of distinctive real types in the population, but rather the relative weights of various positions in the field of solidarity.

Third, the ideal-typical field positions are analysed from the perspective of their broader structural background, thereby expressing their situatedness in other key fields (demographics, material and economic capital, cultural capital, experiences of deprivation or discrimination) and the related attitudes that express the related illusio and habitus (personal and institutional trust, subjective well-being, horizon of expectations, political preferences, religious attitudes). The correspondences were initially analysed using two methods: logistic regression and crosstabs/means comparisons. While the first option promised to reveal the independent impact of each background variable, we decided to choose the better interpretable second option (see Tables 3–5). Even if crosstabs/means comparisons do not allow for the filtering of individual impacts, in our case this goal was less important than the capability of revealing patterns in a comprehensive way.

Finally, the impact of the first wave of the pandemic is investigated. A strictly 'causal' explanation would require a longitudinal research design. Lacking the opportunity for such analysis, our goal remains humbler. The impact of the pandemic is first analysed through retrospective questions that map the pre-pandemic patterns of the problem horizon regarding received and provided support; second, it is analysed through questions directly inquiring into specific transformations related to the pandemic (e.g. related to working conditions) (see Tables 6–10).

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4   This is important for a more refined interpretation. For example, the 'type of support provided to family members' is equally below the average in case of the first and the third clusters; however, this indicates an actual lack of providing support only in the third case, where the cluster centre is 0.6. In the first cluster, the centre is 1.1, meaning that in this case at least one supportive relation is probable – a significant difference, which is inaccessible in standardized form.

## 5. Ideal-typical positions in the field of solidarity

The following table summarises the results of the cluster analysis:

Table 1: *Ideal-typical positions in the solidarity field*

| Cluster centres | unsupportive deprived (21%) | broker of solidarity (10%) | negligent bystander (42%) | private supporter (14%) | volunteer activist (13%) | Total |
|---|---|---|---|---|---|---|
| types of problem since the pandemic (health, psychological, financial, care) | 2,65 | 2,61 | 0,82 | 1,39 | 0,78 | 1,46 |
| sources of received support (family, friends, state, civil sphere) | 2,89 | 3,03 | 0,33 | 0,87 | 0,77 | 1,27 |
| problematic aspects of received support | 0,81 | 1,34 | 0,05 | 0,26 | 0,07 | 0,38 |
| types of support provided to family members (health, psychological, financial, care) | 1,19 | 2,91 | 0,59 | 3,09 | 1,64 | 1,44 |
| types of support provided to friends (health, psychological, financial, care) | 0,86 | 2,86 | 0,30 | 2,76 | 1,10 | 1,13 |
| types of support provided to generalised others | 1,19 | 8,09 | 0,79 | 1,42 | 4,46 | 2,17 |
| sources of information about the provided support | 0,13 | 1,09 | 0,05 | 0,09 | 1,55 | 0,36 |

The first ideal-typical position (21 per cent of the sample) is characterised by an above-average number of problems, received support, criticism of support, and a consistently below-average pattern of provided support. Those who belong to this group are integrated in the field of solidarity one-sidedly: while receiving – not necessarily satisfying – support for their many challenges, they are not contributing either in private or in public chains of support. Such a one-sided position implies an ambivalent integration: even if they possess the symbolic capital of deservingness, this is only partly convertible into adequate support, as expressed by the relatively high level of dissatisfaction. From a broader structural perspective (see Table 3), it may be argued that the members of this group are on the losing side of the global market competition: their rural (mostly village) spatial position and lack of cultural capital prevents them from applying for expertise-based positions, which is expressed both in the relatively high level of unemployment and the far-below-average economic status.

Based on its structural helplessness, this group is supposed to be the primary target of state social policy. However, according to the perspective of its members, it seems that selective and under-financed institutions cannot effectively support them. As is expressed by the consistently below-average satisfaction with health, education, economic, and democratic institutions, members of this group are interacting with an institutional system that is failing them. Accordingly, they find themselves between two stools: not only are they suffering from economic disadvantages, but they are also left on their own by the state. Such an experience of marginalization could easily lead to a nationalistic and xenophobic habitus. However, in case of this group, the opposite is experienced: despite their deprived structural position, members of this group are characterised by a refusal of any form of nationalism: supporters of the governing (Fidesz) and oppositional (Jobbik) right-wing parties are both under-repre-

sented among their ranks (see Table 3). This surprising tendency is explainable by the high proportion of those who have experienced discrimination. It seems that personal experiences of exclusion, complemented by ones originating from the failure of a discursively protection-ist-nationalistic state, do not result in susceptibility to xenophobic populism. These experiences rather lead to disappointment and defeatism. Individuals who belong to this ideal type do not trust others, are not satisfied with the present, see no future (see Table 4). They seem to express the worst-case scenario of atomisation and marginalisation: as they do not have the resources to provide support, they cannot engage in reciprocity relations, which leaves them in a helpless position in which they have no alternative but to rely on alms instead of calling on their right to services.

From their perspective, the illusio of the solidarity field is a cruel one: among them the exclusive logic of deservingness is above average (see Table 5). This indicates their involve-ment in battles for scarce symbolic capital: to achieve a more deserving position, they tend to devaluate many rival social groups. Such tense contestation for deservingness is comple-mented with a paternalistic view of responsibilities. The unsupportive deprived tend to look at state-level actors (including the EU and global organisations) as primarily responsible for handling social crises such as the pandemic (see Table 10).

The second ideal-typical position (10 per cent of the sample) is characterised by an above-average level of needs, received support, and problems with received support; and also an above-average level of private and public provided support and awareness of supportive interactions. Those who belong to this group are in an exceptional position as they accumulate the symbolic capital of deservingness and respectability at the same time. Such a position is not only unique because of its access to both the perspectives of the receiver and the provider of support, but also because of its potential to express informed criticism that reaches beyond the private sphere. The members of this group are not only critical about received support, but also ready to seek alternative paths. This possibility is enabled partly by their demographic characteristics, as the solidarity brokers are mostly younger metropolitans with larger than average families, and partly by structural position: the members of this group have jobs, sav-ings, and above-average living conditions. Although they do not have a high level of cultural capital, most of them have expertise or skills that can be sold on the job market. In this sense, even if they do not belong to the privileged of global capitalism, the spectre of unemployment does not haunt them (see Table 3).

Accordingly, despite their hardships, the members of this group are not in a hopeless position at all. They benefit from the advantageous side of selective social policies, which is expressed in satisfaction with health, education, economic and democratic institutions. Also, they are embedded in both private and public networks of support, which is expressed in their high level of trust in others. Despite the higher-than-average experiences of discrim-ination, the members of this group are satisfied overall with their life and prospects (see Table 4). In this sense, their habitus represents the possibility of succeeding in a challenging social environment. While the unsupportive deprived suffer from both economic deprivation and exclusion from welfare, which prevents them forming solidarity ties, brokers profit from selective state social policy and succeed on the job market as well, which also enables them to complement the missing components of solidarity. This is expressed in political prefer-ences as well: both support for Fidesz and the left and the right wing of the new opposition is over-represented among their ranks, which expresses the fact that various paths of advocacy are equally included in their toolset.

From their perspective, the illusio of the solidarity field is a secure one: while being certain about their deservingness, they also generously support various social groups. Due to their confidence of being recognised, they do not view others as rivals of deservingness, but rather as potential targets of support that provides respectability (see Table 5). The certainty of deservingness paired with a willingness to provide support affects the attribution of social responsibility as well. Solidarity brokers tend to view NGOs as almost as important actors of solidarity in times of crises as state-level organizations, which is the result of a relatively high level of trust in the former and distrust of the latter (see Table 10).

The third ideal-typical position (42 per cent) is the complete opposite of the solidarity brokers, as it is characterised by a below-average level of needs and received support; and also a below-average level of private- and public-provided support or awareness. The members of this massive group that we name negligent bystanders are exceptional because of their complete exodus from the field of solidarity: they neither ask for nor provide support, i.e. they ignore both forms of symbolic capital. In this sense, they exemplify the widespread consequences of atomization; the disintegration of solidarity ties; and escapism to an individualised lifestyle organised around the consuming of experiences. Demographically, this group is constituted of the oldest strata living in rural towns, in below-average-sized families. From a structural perspective, they are characterised by above-average cultural capital, and a secure (often pension-based) but not particularly rich economic background (see Table 3).

While a minimal level of material resourcefulness is needed for independence in the case of negligent bystanders, this is complemented by an accepting attitude towards state social policy institutions. Furthermore, this group is also characterised by an average level of satisfaction, a lack of political preferences (only the voters of the right-wing opposition party, Jobbik, are slightly over-represented) and a lack of experiences of discrimination (see Table 4). Overall, this ideal-type represents the apathetic 'petit-bourgeois' individualism that originated in the Kadar era. Such an attitude is constituted of an emptied, disillusioned version of paternalism (involving not particularly effective, but acceptable state support) and giving up on personal responsibilities while escaping to the private sphere (Sik, 2016).

From their perspective, the illusio of the solidarity field is emptied. They tend to support various social groups less frequently than average; however, not because they compete with them for deservingness, but rather out of indifference (see Table 5). When it comes to social responsibility, the negligent bystanders resemble the unsupportive deprived: they consider solidarity to be the task of state-level institutions, and particularly not NGOs (see Table 10).

The fourth ideal-typical position (14 per cent of the sample) is characterised by an average level of problems, a below-average level of received support, below-average dissatisfaction, an above-average level of support provided to family members and friends, and below-average civil activity and information. Private supporters represent an ambivalent position: on the one hand, they are characterised by a focus on private networks of care as primary platforms of solidarity; on the other hand, by a one-sided integration into these networks, mainly as supporters. From a demographic perspective, this group is constituted of mostly younger or middle-aged women living in rural areas, in larger-than-average families. Their structural position is characterised by the lack of both cultural and material capitals and an insecure position in the labour market (see Table 3).[5] Accordingly, it seems that private supporters are not only in

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5   A group similar to the private supporters has also been analysed by research focusing on the impact of the pandemic on household labour distribution (Fodor et al., 2020). According to this research, it may be argued that this strongly gendered position in the field of solidarity has been burdened with new types of supportive tasks, further increasing its disadvantages.

an exploited position within the solidarity field, but also in a generally vulnerable one. They represent those mostly female actors who bear on their shoulders the consequences of a dysfunctional system of social security.

Despite these various structural disadvantages, private supporters do not express a particularly high level of criticism or dissatisfaction. Their opinion of the quality of democracy and the educational system is average – only health-related institutions are viewed more critically than average. Also, on a personal level they are overall slightly more satisfied than average. As supportive relations are limited to private networks, it is not surprising that the members of this group are also characterised by an above-average level of mistrust in others (see Table 4). This attitude expresses a quasi-traditional habitus based on local community ties instead of distant institutions or unpredictable generalised others. On the level of political preferences, this suspicion does not imply support for governing parties advertising nationalist protectionism. Instead, it implies support for Jobbik, the right-wing opposition party.

From their perspective, the solidarity field is 'disillusioned': they refuse both the extremities of supporting or denying various social groups – those who would support anybody or refuse everyone are both underrepresented (see Table 5). They are also disoriented about social responsibility: they do not consider state-level institutions, NGOs, or direct action to be a reliable way of providing support in times of crisis (see Table 10).

The fifth ideal-type (13 per cent of the sample) is characterised by a below-average level of problems, an average level of provided private support, and an above-average level of civil support and awareness of supportive interactions. This group is the opposite of the first one: the volunteer activists are also integrated into the field of solidarity in a one-sided manner; however, in their case this means the provision of support, without relying upon it. From a demographic perspective, this group is constituted of mostly middle-aged people living in urban areas in above-average sized families. They occupy an advantageous structural position: both their cultural and material capital is far above average, while their job position is also secure (see Table 3). Unlike in the case of solidarity brokers (who share their passion of helping in the civic sphere), in the case of the former providing support is not motivated by the need to build strong solidarity ties capable of complementing dysfunctional institutions. Unlike in the case of negligent bystanders (who share their structural position in terms of material and cultural capital), they are not satisfied with their own well-being and security. In contrast to these groups, civic volunteers reach out to those in need, and they are compensated solely by the symbolic capital of respectability (see Table 4).

Interestingly, these acts of support remain somewhat apolitical: members of this group are not only satisfied with their own personal lives, but also with the *status quo* in general, including those dysfunctional institutions that create demand for their activity in the first place. This may be closely related to another feature – a habitus shaped by an average level of the experience of discrimination. Without structural or other forms of vulnerability, the stake of the acts of support does not include personal survival. Its illusio is rather based on the realisation of distant utopic or religious ideals, with the hope of improving the world by lessening the suffering of others. On the level of political preferences, this attitude is expressed by an ideological heterogeneity: among the ranks of civic volunteers, supporters of new-wave opposition parties, governing parties, and apoliticals are equally represented in above-average proportions (see Table 3).

From their perspective, the illusio of the solidarity field is inclusive: they would support most groups in need as they do not compete with them for deservingness; rather, they rely on them as sources of gaining respectability (see Table 5). When it comes to social responsibility,

volunteer activists tend to rely more on NGOs, but unlike the solidarity brokers, this is not complemented with distrust of state-level institutions (see Table 10).

All in all, this overview reveals the complexity of the contemporary field of solidarity in Hungary. On the one hand, it may be concluded that many of those distortions and dysfunctionalities that were described by previous research that focused on various dimensions are reinforced by our study. On the other hand, the ideal-typical positions provide an opportunity to answer questions inaccessible to previous research. The various positions in the field of solidarity represent not only different patterns of symbolic and material capital, but also of habitus and illusion, framing divergent strategies, activities, and interactions. The dynamics of the solidarity field depend on these heterogeneous characteristics. Regarding such dynamics, various questions may be raised: how do indifferent masses in secure positions and privileged volunteers react if they experience personally or through media coverage new forms of suffering; how do the chronically deprived masses react if the already barely functioning, selective institutions of social politics are able to provide even less support; how can apolitical private supporters cope with an increase in their already overwhelming burdens; and how may brokers react if their own problems grow along with the need for the support they provide? In the last section, these trajectories are explored from the perspective of the pandemic, which set into motion the already ambiguous solidarity field.

## 6. The impact of the pandemic on the field of solidarity

Our questionnaire retrospectively measured dimensions of positions in the pre-pandemic field of solidarity. However, the limited length and complexity of the questionnaire hindered the exact reproduction of dimensions of solidarity for pre-pandemic times, and only allowed us to produce more simple indicators than those applied above to produce the actual current positions.[6] Despite such a limitation, the questionnaire still allowed us to derive claims regarding the changes: we calculated the same – simplified – indicators for the time of the questioning and compared these present time and retrospective measures according to ideal-typical groups.

As a general tendency, it seems that the pandemic did not fundamentally reconfigure the field of solidarity; rather, it turned previously latent features into manifest ones.[7] Regarding the number of problems (out of the three types), we see that in all five groups the average number of problems increases almost uniformly (with a slightly greater increase only in the group of unsupportive deprived respondents). Regarding changes in received support in relation to the most severe problems, we see that there is a decrease in the average number of support resources in all groups (except for the unsupportive deprived, for whom a small increase in the average of support resources is measured). As for the private help of friends or family, we see an increase in and diversification of helping, according to group averages, in all five groups (with such increase being the biggest for private supporters and the smallest for negligent bystanders – see Table 6). Last, for civic participation defined according to the helping of needy groups, we find that the majority of brokers and volunteer activists are 'veterans' – this

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6   Changes tied to the pandemic period were thus measured based on the experience of only three types of problems (health, psychological, material-economic); the number of resources of received support concerned only the most severe problems that occurred prior to the pandemic; types of given support were asked for private relations in general (instead of asking family and friends separately); and civic activity was measured by the frequency of the most important activity, instead of the number of various causes and groups supported.

7   This conclusion is supported by research based on different methods and fields, such as one aimed at measuring the regional impact of pandemic-related state support: while the pandemic impacted various regions on a different scale, support was not differentiated, which resulted in an increase of inequalities (Kovács et al., 2020).

means they were active already prior to the pandemic. This tendency is completed by the rel-atively small-scale mobilisation of newcomers (to a smaller degree in the former and a greater degree in the latter group). At the same time, a major restructuring of the field is shown by more than 30 per cent of the deprived, bystanders, and private supporters withdrawing from the field of the civic helping of needy groups, despite their experience of doing so in the five years before the pandemic (see Table 7).

Probably the most direct impact of the first wave on the broader field context is related to the changing work circumstances. The two most affected clusters include the solidarity brokers and the volunteer activists: within both of these clusters, those who work in sectors either overburdened (e.g. health care, social or educational) or devastated (e.g. tourism, ser-vices) by the pandemic are over-represented. Also, work circumstances changed the most in these sectors: within both clusters those who work partly or completely from home are over-represented (see Table 8).

On the level of illusio, the pandemic gave rise to two distinctive patterns. The unsupport-ive deprived cluster was characterised by pessimism concerning imminent solutions being provided by science (an opinion shared by private supporters); criticism of human activi-ties for being responsible for such crises; and the expectation of the long-term impact of the pandemic. Volunteer activists are also critical about the responsibility of humanity, but they express rather optimistic views about scientific solutions and the possibility of unified inter-ventions (see Table 9).

To draw some general conclusions about the Hungarian field of solidarity, these circum-stances also need to be taken into consideration. The two biggest groups within the field – the deprived and bystanders – are both characterised by their below-average involvement as supporters in solidarity interactions. This means that the majority of actors are either inte-grated into rather deprived positions (through the symbolic capital of deservingness) or not integrated at all. However, this constellation is not independent of the pandemic: while private helping of friends and family increased to some extent for both groups since the outburst of the pandemic (though in a similar way as in other groups, thus not changing the relative positions of these categories), the withdrawal of civic support intensified since the first wave. The sheer proportion of unsupportive actors (60% of the sample) who are either interested mostly in the symbolic capital of deservingness or completely disinterested fundamentally impacts both the space of possibilities and expectations related to solidarity. Deprived actors lack the resources; negligent ones lack interest in influencing the internal struggles of the solidarity field. Since the pandemic they have been even more stuck in their unbalanced posi-tions (which in case of the deprived actors even means an increase in received support), thus the chance of their criticising the *status quo* while demanding the redefinition of normative interpretations and institutional praxes is even more improbable. Overall, this results in the conservation of the various local and global structural distortions that weaken solidarity ties.

These distortions affect not only the passive majority, but also those various groups that actively provide support for others. In their case, strong segmentation may be identified. Pri-vate supporters limit their activity to community ties, which is often considered to be a nat-uralised obligation (i.e. the 'duty' of women), not a merit – thus, these activities do not result in symbolic capital. The activists focus mostly on public cases that can generate the symbolic capital of respectability – however, these efforts are seldom rewarding otherwise. This Sis-yphean role is even more important as state support for marginalised groups is continuously decreasing, while civil support for stigmatized groups is often hindered or sometimes perse-cuted by governmental propaganda and the authorities. On the one hand, the pandemic has

contributed to increasing the burden of volunteers, in parallel with decreasing their number. These tendencies indirectly imply a decline in the support provided by them, which further increases the hopelessness of their target groups. On the other hand, it has also mobilised newcomers who had the resources and became willing to contribute to ameliorating the condition of generalised others in need. Similar tendencies affected the brokers, who are involved in all roles, which provides access to a unique epistemic position. However, unlike in case of the activists (who are in a secure structural position and not in need of support), in the case of the former the increase in provided support is paired with a decrease in received support – that is, an overall less sustainable position.

In sum, the pandemic did not fundamentally reconfigure the solidarity field, which continues to be characterised by a large majority reproducing and naturalising distorted patterns. However, it set back many of those vulnerable supportive ties that had the opportunity of changing the horizon of negligent and the private supporters; also, it took away resources from already active supporters. These negative consequences are only slightly countered by the newcomers in the active groups. After the second and third waves of the pandemic, it remains an open question how these dynamics will evolve. Based on the above diagnoses, it is difficult to envisage any optimistic scenarios.

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APPENDIX

Table 2: *The steps of operationalization*

| dimension of cluster | survey questions | steps of aggregation |
|---|---|---|
| types of problem since the pandemic (health, psychological, financial, care) | K1 Are you hindered in your everyday activities by chronic illness, bad health, disability or mental problems? If yes, then to what extent? (Think about the time since the pandemic)<br><br>K2 Are you hindered in your everyday activities by a depressed mood, anxiety or stress? If yes, then to what extent? (Think about the time since the pandemic)<br><br>K3 Does it constitute a difficulty in your everyday life that you support a relative with medical condition on a regular basis or that you are at home with children?<br><br>very much – to some extent – no, not at all<br><br>K4 Which options describe your household income the best (since the pandemic)?<br><br>we are living comfortably from our incomes – we manage with our incomes – we face difficulties – we barely make ends meet | In the case of K1-3 'very much' and 'to some extent' were added, and in the case of K4 'we face difficulties' and 'we barely make ends meet' were added. |
| sources of received support (family, friends, state, civil sphere) | Have you received any support for your problems related to health/ bad mood/ caring tasks/ or material challenges since the pandemic? Several options may be chosen.<br><br>K5 from my family K6 my neighbours K7 my friends K8 state or municipal institutions (e.g. health care, social, educational) K9 major aid organization (e.g. Red Cross, Malta) K10 NGO K11 churches K12 private companies K13 unknown people | First, in the case of each problem a variable was constituted that measured if the subject receives help from at least one source ('yes' in K5-13). Second, the number of instances of received support was added. |
| problematic aspects of received support | K14 If you have received support, please evaluate its efficiency<br><br>overall, it matched my needs – it helped me partly – it did not help at all – help was not provided by anyone<br><br>Please indicate how much any of these characterised the received support<br><br>K15 I could not express, what I need exactly. / K16 I was ashamed for being a burden on the shoulders of others. / K17 I felt that the support was provided unwillingly. / K18 I could not trust the supporter. / K19 I was afraid of being in debt.<br><br>very much true – partly true – rather not true – not true at all | First, from K14 'it helped me partly' and 'it did not help at all' were added. Second, from K15-19 'very much true' and 'partly true' were also added. |

| dimension of cluster | survey questions | steps of aggregation |
|---|---|---|
| types of support provided to family members/ friends (health, psychological, financial, care) | K 22 Did you provide any support to your family members in relation to the pandemic? <br><br> K23 Did you provide any support to your friends in relation to the pandemic? <br><br> alleviation of physical suffering (nursing, care) / Their mental well-being (e.g. conversation) / in terms of their financial needs (e.g. donation, loan, food, etc.) / in terms of managing their everyday affairs (e.g. shopping) <br><br> yes, on a daily basis - Yes, at least weekly - Yes, less frequently than weekly – No | Those activities were added in the case of K22 and K23 when support was provided 'on a daily basis' or 'at least weekly' |
| types of support provided to generalised others | K 24 Did you provide any form of support (donation, volunteering) to any of these groups (outside of your family): <br><br> elderly people / patients / relatives / carers / people losing their jobs, / unemployed / people losing their homes, homeless people / people living in poverty / children having difficulty accessing online education / Roma living in poverty / addicts / minority Hungarians (e.g. Transylvanians, Transcarpathians, Moldavian Csangos) / refugees, asylum seekers / health workers, doctors, nurses / teachers / social workers / press products or cultural institutions requesting support (e.g. theatre) / animal and nature conservation organizations requesting support (e.g. shelter) / alternative economic organization (network of local producers) / other group or case <br><br> helped - didn't help, but consider it important to help - didn't help, and don't consider it important to help | Those activities were added when 'helped' was chosen |
| sources of information about the provided support | K25 Did you get any information about the targeted problems? Multiple answers are possible. <br><br> I gathered information from the press - I gathered expert information – I was relying on my own expertise – I discussed it with my friends | Those sources were added which were accessed |

Table 3: *Demographic and structural background of ideal-typical position (habitus)*

| | | unsupportive deprived (21%) | broker of solidarity (10%) | negligent bystander (42%) | private supporter (14%) | volunteer activist (13%) |
|---|---|---|---|---|---|---|
| gender** | Male | 16,6% | 12,8% | 46,0% | 12,3% | 12,3% |
| | Female | 24,4% | 8,2% | 39,3% | 15,7% | 12,4% |
| age** | | 20,7% | 10,4% | 42,4% | 14,1% | 12,4% |
| | 18-29 years | 18,1% | 18,1% | 36,8% | 18,8% | 8,3% |
| | 30-39 years | 25,0% | 14,0% | 33,8% | 18,4% | 8,8% |
| | 40-49 years | 15,8% | 11,8% | 40,8% | 15,1% | 16,4% |
| | 50-59 years | 27,3% | 9,1% | 37,2% | 13,2% | 13,2% |
| | 59+ years | 19,5% | 3,3% | 54,9% | 8,9% | 13,4% |
| | | 20,7% | 10,3% | 42,7% | 14,1% | 12,3% |
| settlement type * | Budapest | 18,1% | 14,8% | 41,6% | 12,1% | 13,4% |
| | county centre | 20,8% | 8,8% | 48,4% | 8,8% | 13,2% |
| | town | 16,7% | 8,9% | 44,4% | 15,2% | 14,8% |
| | village | 26,8% | 10,2% | 37,0% | 18,3% | 7,7% |
| | | 20,8% | 10,4% | 42,5% | 14,3% | 12,1% |
| education** | max. elementary school | 27,7% | 10,1% | 38,8% | 18,6% | 4,8% |
| | vocational school | 25,3% | 13,5% | 35,9% | 12,9% | 12,4% |
| | high school degree | 18,9% | 9,3% | 46,3% | 13,7% | 11,9% |
| | min. BA/ BSc | 11,6% | 9,8% | 46,8% | 11,0% | 20,8% |
| | | 20,7% | 10,5% | 42,4% | 14,1% | 12,2% |
| subjective economic status** | living very well | 6,0% | 20,9% | 41,8% | 11,9% | 19,4% |
| | managing at an acceptable level | 11,5% | 8,7% | 47,6% | 14,3% | 17,9% |
| | having economic difficulties | 34,3% | 10,4% | 38,2% | 11,6% | 5,6% |
| | facing serious economic hardships | 34,4% | 10,0% | 32,2% | 22,2% | 1,1% |
| | | 20,8% | 10,4% | 42,4% | 14,1% | 12,3% |
| how many month's savings do you have?** | .00 | 28,4% | 6,9% | 43,6% | 15,3% | 5,8% |
| | 1.00 | 23,0% | 4,7% | 43,2% | 17,6% | 11,5% |
| | 2.00 | 15,8% | 13,7% | 41,1% | 15,8% | 13,7% |
| | 3.00 | 14,5% | 16,0% | 40,1% | 10,8% | 18,6% |
| | | 21,1% | 10,4% | 42,1% | 14,2% | 12,2% |
| how many people live together in your family?** | 1.00 | 23,5% | 5,1% | 52,0% | 8,2% | 11,2% |
| | 2.00 | 21,2% | 5,8% | 50,0% | 12,8% | 10,2% |
| | 3.00 | 24,1% | 16,6% | 33,7% | 11,8% | 13,9% |
| | 4.00 | 15,8% | 12,9% | 37,1% | 20,0% | 14,2% |
| | | 20,5% | 10,4% | 42,6% | 14,1% | 12,4% |

|  |  | unsupportive deprived (21%) | broker of solidarity (10%) | negligent bystander (42%) | private supporter (14%) | volunteer activist (13%) |
|---|---|---|---|---|---|---|
| occupation** | paid activity or learning | 18,6% | 14,6% | 37,8% | 14,6% | 14,4% |
|  | unemployed, active job seeking | 26,0% | 9,6% | 39,7% | 17,8% | 6,8% |
|  | inactive | 23,7% | 1,3% | 52,2% | 12,7% | 10,1% |
|  |  | 20,8% | 10,3% | 42,2% | 14,4% | 12,4% |
| experience of discrimination** | Yes | 25,3% | 18,9% | 31,1% | 12,6% | 12,1% |
|  | No | 19,3% | 7,7% | 46,1% | 14,6% | 12,3% |
|  |  | 20,8% | 10,4% | 42,5% | 14,1% | 12,3% |
| Party preferences | DK-MSZP (post-communist socialist parties in opposition) | 24,1% | 9,3% | 42,6% | 13,9% | 10,2% |
|  | PM-LMP-Mo-mo-MKKP (post-2010 opposition) | 26,8% | 12,2% | 40,2% | 3,7% | 17,1% |
|  | Fidesz-KDNP (post-communist right-wing parties in government) | 16,9% | 13,5% | 42,7% | 12,4% | 14,6% |
|  | Jobbik (post-2010 right-wing opposition | 7,9% | 11,1% | 46,0% | 27,0% | 7,9% |
|  | does not vote | 23,7% | 8,6% | 42,4% | 15,1% | 10,1% |
|  | no answer | 21,7% | 8,2% | 41,5% | 15,5% | 13,0% |

*p<0,05 **p<0,01

Table 4: *Attitudes of ideal-typical positions (illusio/ habitus)*

|  | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist | total |
|---|---|---|---|---|---|---|
| trust in others (1–10)** | 3,78 | 4,69 | 4,33 | 4,09 | 5,30 | 4,34 |
| satisfaction with life (1–10)** | 4,12 | 5,31 | 5,37 | 5,60 | 6,12 | 5,23 |
| satisfaction with the economy (1–10)** | 3,21 | 4,98 | 4,00 | 4,15 | 4,29 | 4,00 |
| satisfaction with the quality of democracy (1–10)** | 3,19 | 4,61 | 3,58 | 3,57 | 4,28 | 3,69 |
| satisfaction with quality of education (1–10)** | 3,27 | 4,79 | 3,99 | 3,97 | 4,33 | 3,96 |
| satisfaction with quality of health care (1–10)** | 2,94 | 4,28 | 3,21 | 3,08 | 3,75 | 3,32 |
| uncertainty of future (1–10)** | 3,42 | 5,17 | 4,65 | 4,46 | 5,20 | 4,49 |

*p<0,05 **p<0,01

Table 5: *The exclusivity of solidarity (illusio)*

The exclusivity of provided support
(groups in need of support included the labels mentioned in K24, see Table 2)

|  | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist | total |
|---|---|---|---|---|---|---|
| Supports or intends to support every social group in need (0 labels refused) | 22,3% | 31,5% | 29,4% | 26,7% | 38,7% | 28,1% |
| Supports or intends to support many social group in need (1-3 labels refused) | 29,0% | 43,8% | 24,5% | 33,6% | 38,7% | 30,2% |
| Supports or intends to support a few social groups in need (4-8 labels refused) | 29,5% | 20,5% | 27,1% | 29,3% | 21,3% | 26,9% |
| Would not support most social group in need (9-18 labels refused) | 19,2% | 4,1% | 19,0% | 10,3% | 1,3% | 14,8% |

Table 6: *The impact of the pandemic on the ideal-typical positions (problem–solution balance)*

|  |  | Number of problems (health, mental, economic) | | Number of times received support for the biggest problem | | Number of incidences of support for family and friends | |
|---|---|---|---|---|---|---|---|
|  |  | prior | during | prior | during | prior | during |
| unsupportive deprived | Mean | 1.10 | 1.54 | 1.21 | 1.32 | 1.77 | 2.41 |
|  | N | 166 | 166 | 127 | 141 | 166 | 166 |
|  | Std. deviation | 0.90 | 0.74 | 0.98 | 0.96 | 1.29 | 1.32 |
| broker of solidarity | Mean | 1.04 | 1.25 | 1.62 | 1.31 | 3.13 | 3.89 |
|  | N | 83 | 83 | 68 | 68 | 83 | 83 |
|  | Std. deviation | 0.80 | 0.86 | 1.03 | 1.00 | 0.95 | 0.41 |
| negligent bystander | Mean | 0.47 | 0.66 | 0.46 | 0.23 | 1.14 | 1.64 |
|  | N | 340 | 340 | 118 | 154 | 340 | 340 |
|  | Std. deviation | 0.68 | 0.78 | 0.65 | 0.51 | 1.19 | 1.38 |
| private supporter | Mean | 0.72 | 0.95 | 0.87 | 0.56 | 2.57 | 3.68 |
|  | N | 113 | 113 | 64 | 77 | 113 | 113 |
|  | Std. deviation | 0.84 | 0.91 | 0.84 | 1.02 | 1.34 | 0.56 |
| volunteer activist | Mean | 0.25 | 0.41 | 0.80 | 0.26 | 2.23 | 2.99 |
|  | N | 98 | 98 | 37 | 44 | 98 | 98 |
|  | Std. deviation | 0.45 | 0.60 | 0.79 | 0.57 | 1.20 | 1.07 |
| Total | Mean | 0.67 | 0.91 | 0.97 | 0.75 | 1.81 | 2.49 |
|  | N | 800 | 800 | 413 | 484 | 800 | 800 |
|  | Std. deviation | 0.80 | 0.87 | 0.96 | 0.97 | 1.39 | 1.45 |

Table 7: *The mobilization potential of the pandemic*

| Civic help before and after the pandemic ('Supported groups in need')* | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist | |
|---|---|---|---|---|---|---|
| veteran (active both before and after) | 13.9% | 72.3% | 9.4% | 15.0% | 83.7% | 26.8% |
| mobilised (active after, passive before pandemic) | 3.6% | 13.3% | 2.9% | 1.8% | 16.3% | 5.6% |
| passivized (active before, passive after pandemic) | 38.0% | 8.4% | 31.9% | 29.2% | – | 26.4% |
| ignorant (both before and after) | 44.6% | 6.0% | 55.8% | 54.0% | – | 41.2% |
| total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Table 8: *The impact of the pandemic on work*

| | | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist |
|---|---|---|---|---|---|---|
| Where do you work (from)?* | home | 16,5% | 17,6% | 34,1% | 14,1% | 17,6% |
| | workplace | 17,7% | 9,8% | 44,9% | 14,4% | 13,1% |
| | partly home, partly workplace | 22,2% | 20,8% | 26,4% | 13,9% | 16,7% |
| | unemployed | 24,3% | 6,5% | 46,0% | 14,2% | 8,9% |
| | | 20,8% | 10,3% | 42,6% | 14,3% | 12,1% |
| In which economic sector do you work? * | burdened by the pandemic (health care, education, social service) | 14,0% | 19,6% | 33,6% | 11,2% | 21,5% |
| | destroyed by the pandemic (services, tourism) | 17,5% | 19,6% | 36,1% | 9,3% | 17,5% |
| | other (industry, agriculture) | 21,6% | 7,3% | 43,2% | 17,4% | 10,4% |
| | unemployed | 22,9% | 4,0% | 49,5% | 14,3% | 9,3% |
| | | 20,5% | 9,3% | 43,5% | 14,3% | 12,4% |

*p<0,05 **p<0,01

Table 9: *Attributions related to the pandemic*

| How much do you agree with the statements? (1-10) | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist | total |
|---|---|---|---|---|---|---|
| science will find a solution soon to the pandemic* | 5,22 | 5,53 | 5,59 | 5,21 | 6,39 | 5,55 |
| humankind is responsible for the pandemic | 7,08 | 6,36 | 6,47 | 6,27 | 6,85 | 6,61 |
| our everyday life involves fundamental change** | 6,99 | 6,52 | 6,17 | 6,15 | 6,80 | 6,45 |
| the pandemic is an opportunity for humankind to unite | 6,29 | 6,25 | 6,21 | 6,57 | 7,13 | 6,39 |

*p<0,05 **p<0,01

Table 10: *Responsibilities for managing the pandemic*

| To what extent are these actors responsible for finding a solution to the challenges of the pandemic? | | unsupportive deprived | broker of solidarity | negligent bystander | private supporter | volunteer activist | total |
|---|---|---|---|---|---|---|---|
| State, local government** | very much | 74,7% | 70,7% | 86,8% | 72,6% | 86,7% | 80,6% |
| | a little or not at all | 25,3% | 29,3% | 13,2% | 27,4% | 13,3% | 19,4% |
| | | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |
| EU institutions* | very much | 75,9% | 71,1% | 82,9% | 72,6% | 78,8% | 78,3% |
| | a little or not at all | 24,1% | 28,9% | 17,1% | 27,4% | 21,2% | 21,7% |
| | | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |
| global institutions (WHO, UN)** | very much | 77,7% | 62,7% | 82,9% | 74,3% | 83,7% | 78,6% |
| | a little | 17,5% | 25,3% | 11,2% | 15,9% | 16,3% | 15,3% |
| | not at all | 4,8% | 12,0% | 5,9% | 9,7% | | 6,1% |
| | | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |
| citizens** | very much | 68,7% | 63,4% | 71,5% | 64,6% | 76,8% | 69,8% |
| | a little | 20,5% | 28,0% | 23,5% | 32,7% | 22,2% | 24,5% |
| | not at all | 10,8% | 8,5% | 5,0% | 2,7% | 1,0% | 5,8% |
| | | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |
| NGOs* | very much | 37.9% | 47.2% | 28.0% | 40.5% | 38.7% | 35.3% |
| | a little | 48.7% | 41.7% | 60.1% | 52.6% | 52.0% | 53.4% |
| | not at all | 13.4% | 11.1% | 11.9% | 6.9% | 9.3% | 11.3% |
| | | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% | 100,0% |

*p<0,05 **p<0,01

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# Digital learning for disadvantaged students during Covid-19: Perceptions of teachers in Hungary's after-school programmes

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## Abstract

The digital learning instituted in Hungary in the spring of 2020 to help halt the spread of the coronavirus arguably encountered stumbling blocks as regards disadvantaged students. However, we have no information about the details, and mitigating these disadvantages is therefore fraught. The aim of our research is to shed light on the experience of digital learning among disadvantaged students.

We analysed responses to an online questionnaire completed by teachers at 48 of Hungary's after-school programmes (ASPs) who were in contact with over 1000, mostly disadvantaged children. We discussed the questionnaire-based analysis with ten ASP representatives in online workshops.

In addition to ICT devices and internet access, the lack of a learning space is also worth considering as a factor hindering the establishment of objective conditions for learning. When maintaining contact with parents, it is recommended that communication habits that differ from those used with middle-class parents should be taken into account. Developing time management and other skills necessary for independent learning (e.g., reading comprehension, and digital literacy), as well as alleviating the psychological burden, represent central tasks in such situations. Our recommendations may be of use in the event of future school closures and in terms of facilitating digital learning among disadvantaged students.

**Keywords**: digital learning, disadvantaged students, after-school programme, Covid-19

## 1. Introduction

Hungary's primary and secondary schools switched to digital learning on 16 March 2020 to prevent the spread of the coronavirus. Students could not attend school, and teachers and students could not meet. Teachers were permitted to use the school infrastructure, but they had to teach online (Governmental decree on the new working procedures in public and vocational education institutions, 2020). Digital learning remained in place until the end of the school year (15 June 2020). The switch to digital learning presumably heightened educational disad-

vantages among the most vulnerable children. However, as we have no information about the details of this situation, it is difficult to develop options to mitigate the disadvantages.

The aim of our study is, first, to examine the consequences of school closures due to coronavirus on students with low socio-economic status (low-SES students), and, second, to make recommendations concerning any challenges that are identified. After-school programmes (ASPs) that support disadvantaged students represent an important potential source of data in respect of how digital learning worked for the children of disadvantaged families. We used an online questionnaire for our analysis, which was completed by teachers at 48 ASPs who maintain contact with over 1000 mostly disadvantaged children and their families. We also discussed the recommendations based on an analysis of the questionnaire with representatives from ten ASPs in two online workshops.

Based on our research, recommendations may be made concerning how to help disadvantaged students catch up in a similar emergency situation and how to organise distance learning for groups that fall behind. In addition, our study stresses some acute problems with which the Hungarian education system is struggling.

## 2. Theoretical background

### 2.1 Potential challenges of digital learning for disadvantaged students

All students were forced to learn at home due to the school closures. At the same time, the consequences arguably differed significantly for students from varying socio-economic backgrounds, in part because of their home environment and in part because of the divergent services provided by their schools. In what follows, we outline the differences in these two areas and then identify some potential difficulties based on the literature.

#### 2.1.1 Home environment

In international comparison, in terms of having at least one computer at home (93.6 per cent) and internet access (96.2 per cent), the situation of 15-year-old Hungarian students can be said to be good, and nor do students with varying family backgrounds exhibit striking differences (OECD, 2015). One study conducted among families with children likewise found a high level of internet use (98 per cent) and widespread ownership of computers at home (91 per cent) (Ipsos, 2020). However, it is important to point out that the quality of devices and internet access can also influence the success of digital learning.

These generally favourable data also demonstrate that a proportion of students do not have the infrastructure required for digital learning. Based on an analysis of the 2017 data from Hungary's National Assessment of Basic Competencies, Hermann (2020) found that 12, 10, and 7 per cent of students in the sixth, eighth and tenth grades, respectively, could not be reached at all due to the lack of internet or a computer. A further 8, 6, and 5 per cent, respectively, could only be communicated with difficulty, since a single computer needed to be shared among three students. These figures total 20, 17, and 12 per cent of the grades under examination. These numbers conceal significant social differences: in the sixth and eighth grades, more than half of the children of mothers who have completed primary school at most cannot connect to online learning, or can, but only partly. In a non-representative study that addressed 425 teachers, a significant proportion of respondents (44 per cent) indicated that the lack of ICT devices and internet was among the main reasons for students being excluded from digital learning (Kende et al., 2021).

A further difficulty for disadvantaged students lies in the fact that digital learning requires major parental help. International comparative studies show that a total of 50 per cent of the Hungarian population is in possession of basic digital skills, a figure which falls behind the European Union average (60 per cent). Among the Visegrád Four (the Czech Republic, Hungary, Poland, and Slovakia), with their many similarities, Hungary only exceeds Poland in this respect (46 per cent) (DESI, 2019). Seventy-five per cent of teachers of mostly disadvantaged students partly or fully agreed with the statement that learning was impossible without significant help from parents in the given situation; they also saw that students were unable to understand learning tasks and learning material independently as the greatest difficulty (with 68 per cent of them agreeing with this statement) (Kende et al., 2021). The survey noted above reinforced the necessity of parental help among parents of school-age children: 78 per cent of the latter said that their child required some degree of parental help with regard to digital learning (Fodor et al., 2020). In all likelihood, parents with low educational attainment, for whom helping their children with their studies otherwise poses a problem, found themselves facing further obstacles due to their lack of experience with information and communication technologies (ICT).

Lack of an appropriate learning space at home is a general feature of families living in poverty. In Kende et al.'s (2021) survey, the absence of a suitable learning space was reported in the largest proportions (71 per cent) by teachers of segregated school classes among the obstacles to digital learning. Stress is generally experienced to a higher degree among low-income families, which is considered a central factor that negatively influences children's cognitive and social-affective development (e.g., Bradley & Corwyn, 2002). Limited leisure-time options outside of the home reinforced the sense of crowdedness, and thus increased stress as well. Added to this was the frequent contributing factor for such families of narrowing job opportunities due to coronavirus, and growing stress caused by a loss of income. It is a known fact that the coronavirus affected less skilled workers more intensely (e.g., Fana et al., 2020; Fodor et al., 2020).

### 2.1.2 Teachers

The Hungarian education system is extremely selective, with students from divergent family backgrounds separated from one another, typically attending school with peers from similar socioeconomic backgrounds. Schools with varied student compositions offer education of significantly divergent quality. In schools in which the proportion of disadvantaged students is high due to an accumulation of learning problems, pre-existing family disadvantages are heightened due to ever scarcer educational resources, the adverse selection of teachers, more restricted financial capacity, and the development of unfavourable motivational processes (Csapó et al., 2019; Kertesi & Kézdi, 2016). According to Kende et al.'s (2021) research, an average of 16 per cent of students could not connect to digital learning, but in institutions with majority disadvantaged students the share was 31 per cent. In the case of small communities, 70 per cent of respondents said that paper-based teaching materials were common or present in their school. These figures suggest that teachers in institutions with a high proportion of disadvantaged students are considerably overburdened during periods of digital learning as well. After all, in addition to online instruction, further solutions for maintaining contact were called for among a significant proportion of students. The existence of overburdened teachers and paper-based learning tasks, designed to be completed without the help of teachers, both suggest a drop in educational quality.

*2.1.3 Additional barriers*

Home learning through digital education demands greater autonomy and self-discipline among students. At the same time, motivation and skills (e.g., reading comprehension and digital literacy) are typically less developed among low-SES students (e.g., Fejes, 2012; Heckman et al., 2011; OECD, 2018).

According to the results of the PISA assessment of digital reading comprehension (among other skills), Hungarian students' achievement is among the weakest in Europe. In addition to this weak average achievement, it is also significant that the link between achievement in this area and socio-economic status is particularly strong in the case of Hungary – the second strongest among the 30 countries (and economies) participating in the assessment. The difference in digital literacy was especially large between those who had the opportunity to use a computer at home and those who did not (OECD, 2015). In other words, for the majority of disadvantaged students in Hungary, weak digital reading comprehension may be a fundamental barrier to digital learning.

Summer setback, or summer learning loss, is a well-known phenomenon among low-SES students. The shift to digital learning is comparable to this phenomenon, which is arguably reinforced by the fact that home learning coincided with the summer break. Although this phenomenon was not only identified with reading skills, disadvantaged students fell behind significantly in their reading performance, since the performance of students from higher-SES families typically improves during the summer break (Cooper et al., 1996). One reason for the increase in the difference can arguably be found in the difference in leisure-time reading habits. This weaker achievement driven by unequal leisure-time reading may have become apparent during the school year among disadvantaged students.

*2.2 First experiences based on the international literature*

In this section, we review the consequences of the switch to digital learning based on data taken from international literature with a focus on socio-economic status.

Grewenig et al. (2020) surveyed parents (n=1099) to collect time-use information on low-achieving and high-achieving primary and secondary school students in Germany. The authors found that low achievers reduced their daily learning time by about half, and replaced it with activities that were less beneficial for their development such as watching TV or playing computer games. Although there was no difference in the reduction in learning time for children from parents with low educational attainment, due to the association between parents' level of education and students' success at school, the results suggest that prevailing educational inequalities have intensified. Andrew et al. (2020) also surveyed parents (n=5582) to explore the consequences of school closures in England. They found differences in the changes of the use of time between children from poorer and better-off families, although these differences were only revealed among primary school students. Furthermore, results suggest differences not only in the availability of ICT devices and internet access at home between families of different socio-economic status, but also in the availability of resources provided by schools. Poorer families were offered less learning support (such as online classes) by schools, but more passive solutions (such as assigned learning tasks without help).

Some studies have categorized households into income groups based on place of residence and examined the differences in the former's learning-related online activity during school closures (e.g., Bacher-Hicks et al., 2020; Chetty et al., 2020). Not surprisingly, results show

greater online activity in higher income households, which suggests that these households were more successful at adapting to online learning.

McNulty and Baird (2020) analysed the literacy performance of 1.6 million students from grades 2–12 in the United States. They used real-time data from an annual literacy test, which enabled them to compare students' results before and after school closures with the expected growth. The authors predicted an 18 per cent increase in the achievement gap between students from low- and high-income schools for those low-income students who were not actively learning during the school closures. According to their analysis, struggling readers (those scoring below the 25th percentile in reading) were less active at online learning, and the performance gap between struggling and advanced readers (those scoring above the 25th percentile) may grow by an additional 6 per cent due to the school closures.

### 2.3 'Tanoda' – Hungary's ASP for disadvantaged students

The first *tanoda* programmes for disadvantaged students in Hungary appeared in the mid-1990s. They were primarily maintained through private donations. In the early 2000s, European-Union-funded grants were announced every one to three years to finance them, which were tied to an increasingly larger financial envelope. As a result of the availability of grant money, the number of programmes run by civil society and faith-based organisations grew steadily, and Hungary's ASP movement began. ASPs have been funded through the Hungarian state budget since 2018, with approximately 180 programmes operating through this source and a further 20 civil society organisations maintaining programmes from other sources (Szűcs & Fejes, 2021).

The assumption that conventional schools fail to accommodate to the particular needs of disadvantaged and Roma students and that the activities of an institution with a divergent perspective is thus required to offset this has played a fundamental role in the formation of the ASPs.

In addition to compulsory schoolwork, ASPs also operate in the afternoon and/or weekends with the voluntary participation of their mentees. A mode of operation that flexibly adapts to the features of the target group and a complex teaching approach that makes it possible to exploit numerous opportunities can be seen as significant features of ASP activities which differ from those of formal schooling and are impossible or far more difficult to implement within the framework of formal education. Examples include leisure-time and community-building events, the use of innovative teaching methods, activities that reinforce the identity of the Roma students, teacher-student relationships that diverge from the norm, and a large proportion of volunteer helpers (Fejes et al., 2016). In sum, with regard to the duties undertaken by ASPs, it is clear that they provide the kinds of services to disadvantaged students that their middle-class peers routinely receive from their families and schools.

A state-funded ASP must meet statutory requirements (Ministry for Human Resources decree on the professional tasks involved in social mobility services for children and the conditions for their operation, 2018), including attending to every mentee in the ASP for no fewer than four hours a week, in addition to keeping its doors open no fewer than four days a week. The headcount in an ASP varies between 20 and 30. In 2019, a total of 5296 students (1689 lower-school students, 3063 upper-school students, and 544 high school students) participated in state-funded ASPs (KSH, 2019). The law that regulates the running of these programmes (Ministry for Human Resources decree on the professional tasks involved in social mobility services for children and the conditions for their operation, 2018) contains criteria for assess-

ing the needs of those receiving support, so that funding is used in line with its aims. It sets out that 70 per cent of the participating children must be beneficiaries of regular child protection benefit (the basis for which is monthly income per family member[1]) and that 50 per cent of those students must be classified as having a disadvantaged or multiply disadvantaged status (the basis for which is parents' low educational attainment, unemployment, and the living environment).

An additional significant feature of ASPs from the perspective of the current study is that they maintain contact with families more actively than schools do. State-funded ASPs must pay visits to the families of their mentees twice a year, set out the details of their cooperation in a contract, and organise an event at the ASP that families may also join at least four times a year.

## 3. Aims and research questions

The aim of our explanatory research was to survey the results of Hungary's school closures due to the coronavirus on children from low-SES families based on the experience of ASP staff, and to collect and develop recommendations for any, primarily educational, challenges that arise. We believe our results could be of use in the event of future school closures, as well as in terms of facilitating digital learning among disadvantaged students. Our research questions were as follows:

- What challenges have ASP teachers identified in relation to the transition to digital learning during their work of supporting disadvantaged students and their families?
- What potential solutions have they come up with to tackle or mitigate these challenges?

Since the target group for the ASPs consists of disadvantaged children, the data collected from those programmes is not suitable for painting a general picture of digital learning. At the same time, the former can be expressly helpful for illustrating the situation of those children from the poorest families, and for assisting in the development of recommendations for those who are arguably most disadvantaged by digital learning. A further benefit of using the experience of ASP staff is that, owing to the complex approach used by these programmes, they have insight into a number of areas that influence the effectiveness of digital learning, including the functioning of the families and the assigning of learning tasks.

We consider that exploring the perceptions of ASP teachers is especially valuable in relation to describing the teaching practices of schools during the school closures. One of the priorities of ASP teachers is to support their mentees in their efforts to meet the expectations of their schools. Thus, ASP teachers are in regular contact with students, and often with parents and school teachers as well, hence they have accurate information about the educational practices at their mentees' schools. Moreover, due to their qualifications and experience, ASP teachers are well aware of the circumstances at schools. Looking at digital learning from the perspective of any of the interested parties naturally provides us with a distorted picture – however, for the reasons mentioned above, we consider understanding the perspective of ASP teachers to be of crucial importance.

Based on the literature, we predict that the transition to digital learning was especially unfavourable for low-SES students. We assumed there would be problems in the following areas tied to school learning: availability of ICT devices and internet access; reading comprehension and

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1    The threshold value at the time of the study was equal to 110 euros.

digital competencies among students and their parents; and contact maintained between student and school (communication, help with learning, and assigning learning tasks). We also collected information tied to the ASPs in these areas – first, to obtain a more detailed understanding of the situation of ASP mentees, and second, to provide points of reference concerning the operation of the schools. In addition, we asked about assistance requested of ASP teachers by families, adaptation to the changed situation, and potential solutions to challenges that arose.

## 4. Data collection and analysis

The source of the data we analysed was an online questionnaire,[2] which teachers in ASPs that constitute the TanodaPlatform network[3] received by email. The questionnaire was completed by 48 ASP staff members, with the questionnaire being completed in the second half of April 2020; that is, with the respondents having had experience with the shift to digital learning.

The questionnaire consisted mainly of closed-ended (62) and some open-ended (11) questions. The majority of the former were Likert-type questions. The questions can be grouped into the following topic areas: features of the ASPs at which the respondents teach; their perceptions of the contact maintained between ASP mentees and the school (communication, help with learning and assigning learning tasks); contact maintained between ASP mentees and their ASP (communication, help with learning and assigning learning tasks); barriers to digital learning and potential solutions; and families' needs as regards the ASP and the operation of the ASP during the digital learning period. Responses to open-ended questions were thematized. This categorization was carried out by two encoders. In the first phase of data analysis, one of the encoders reviewed 30 per cent of the responses, and suggested categories with examples. Then, both encoders reviewed all the responses, and encoded them in accordance with the protocol. When there was a mismatch in the categorization of a response between the encoders, they discussed it and agreed on a category for it.

We discussed recommendations based on an analysis of the questionnaire in two online workshops with ten ASP representatives in the last week of the school year in June 2020. We asked the five teachers at each of the approximately one-and-a-half-hour workshops to validate the problems that had been identified based on the questionnaire and to outline potential solutions. Five of the ten ASP representatives had not completed the questionnaire previously. The workshops were audio recorded, then transcribed. During the text analysis, we identified the common challenges and the actual practices that were followed by the various ASPs to tackle these challenges. We have integrated the results from the workshops into the Conclusion and recommendations section below.

## 5. Specific features of respondents' ASPs

The online questionnaire was completed by representatives from 48 ASPs, which represented about one-quarter of the ASPs that were operating at the time of data collection in Hungary (see KSH, 2019; Szűcs & Fejes, 2021). Every respondent reported the number of children in

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2    The questionnaire was discussed by staff at the Motivation Educational Association, the Rosa Parks Foundation, and the Partners Hungary Foundation. The main focus of all these three non-governmental organizations is to support disadvantaged students and their families as regards education.

3    Coordinated by the Motivation Association, TanodaPlatform is a professional community that has been in operation since 2013 and organises innovative ASPs into a network, asserts their interests, and develops methodology (see Fejes et al., 2016).

their ASP. Based on their responses, the programmes of the teachers surveyed served 1177 children. Of these ASPs, 41 are currently state-funded, in which case, as noted above, it is a statutory requirement to verify family need. The majority of these terms also presumably apply to ASPs that are not funded by the state. In other words, the majority of the children on the respondents' radars are certainly low-SES.

A significant number of the children who are served are of Roma descent; nearly half of the respondents (48 per cent) reported that the proportion of Roma mentees in their ASPs ranges between 76 and 100 per cent, while a further third (29 per cent) of respondents provided an estimate of between 50 and 75 per cent. As for age groups, the latter reported serving mostly primary school students, mostly in the upper grades (fifth to eighth grades). The number of secondary school students served by the participating ASPs was low. Eleven ASPs did not have any secondary school mentees, 11 ASPs reported that the proportion of secondary school mentees was no more than 20 per cent, and only one ASP reported to serving mostly secondary school students.

As regards type of locality, the sample can be seen as heterogeneous, with staff responding to our survey from four ASPs in Budapest, 25 from other cities and towns, and 19 from villages. Thirty-nine of the 48 responding ASPs specified the exact name of the location where they were operating. The geographical distribution of respondents is shown in Figure 1. It is important to note that the geographical distribution of ASPs is not balanced in Hungary – their share is greater in those regions of the country where the proportion of the Roma minority is larger. This geographical representation is represented in our sample as well, but the South Transdanubian region was underrepresented (see Pénzes et al., 2019).

Thirty-one of the responding ASPs are maintained by independent civil society organisations, seven by church-affiliated and two by school-affiliated ones, while six of them are maintained by a church and a further two by other entities. As regards duration of operation, the responding ASPs can be seen as heterogeneous (mean=7.1 year; SD=4.9; min.= 1; max.=27).
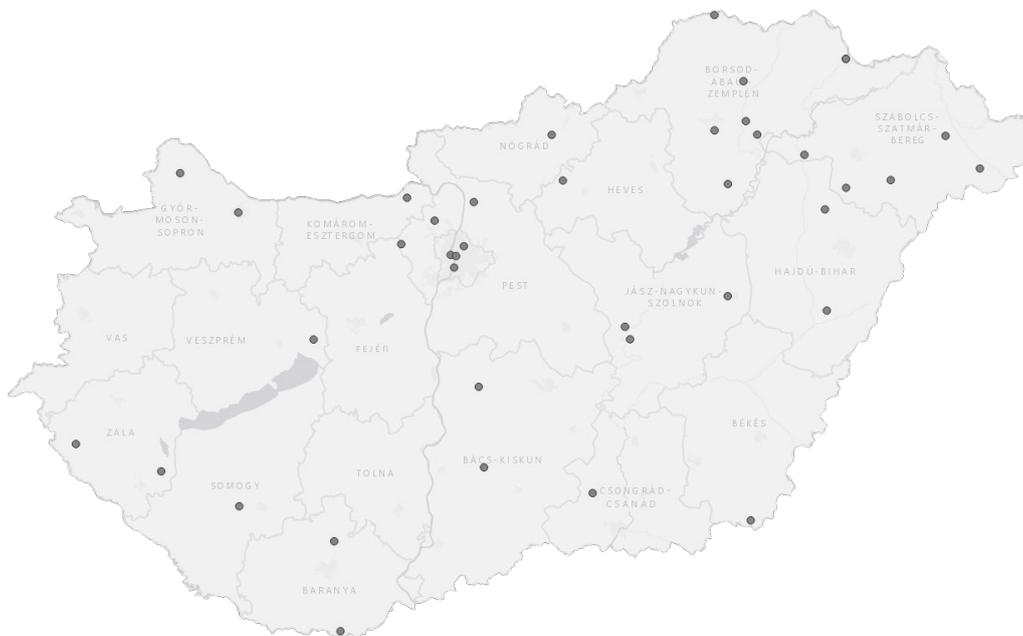


Figure 1: *The geographical distribution of the responding ASPs*

## 6. Results

*6.1 Maintaining contact with the school and the ASP*

Respondents estimated that 66 per cent of their mentees were able to join in digital learning organised by their school. They reported that 87 per cent of their mentees had access to the digital activities set up by their ASPs.

The participants evaluated the frequency of contact between mentees and their school and between mentees and the participants' own ASP as taking place through the following channels: telephone, email, and chat platforms. They also had the choice of 'Don't know' as regards school practice in this regard. Respondents were naturally only able to share their general perceptions about their local school. That is, the data on the ASPs were more reliable. At the same time, absent other sources of information, it is perhaps these ASP teachers who can paint the most objective picture of how the school's teachers reached disadvantaged students, and with what success. Further, we wish to point out that a total of only one or two ASP teachers reported that they were unfamiliar with the school's practice as regards use of a particular channel of contact.

The frequency of use of the various channels varies between the schools and ASPs (see Figure 2 for a clear illustration of these divergent practices). According to our data, the schools primarily reach students on chat platforms rather than by email or telephone. Chat platforms are also the primary channel of contact among the ASPs, but far more significantly than among schools. ASP staff use email less frequently, but phone their students more often than school' teachers do.

A further question inquired into whether individual assistance was available by telephone or online at the school and at the ASP should the need arise. The only difference in the responses in this regard was that the ASP teachers had the option of responding with 'Don't know' in respect of the school. Ten per cent of the respondents chose this option, a fact which we did not take into consideration in our analysis so that we could compare the practices of the two institutions (see Figure 3). According to the perceptions of half of the ASP teachers,
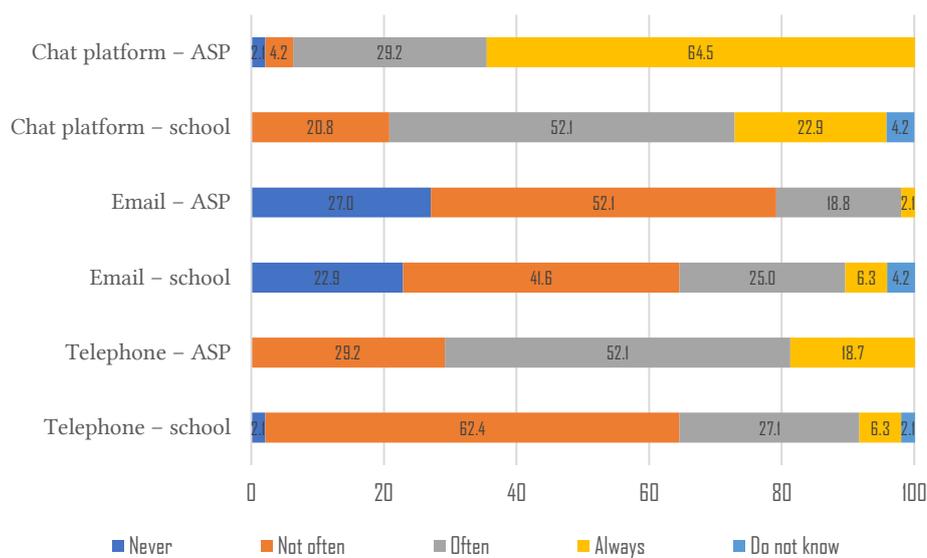


Figure 2: *Channels of contact at school and the ASP based on ASP staff responses (%)*

assistance by telephone or online from the school was virtually unavailable to students, while the majority of respondents (83 per cent) reported that such aid was common or very common for the ASP.
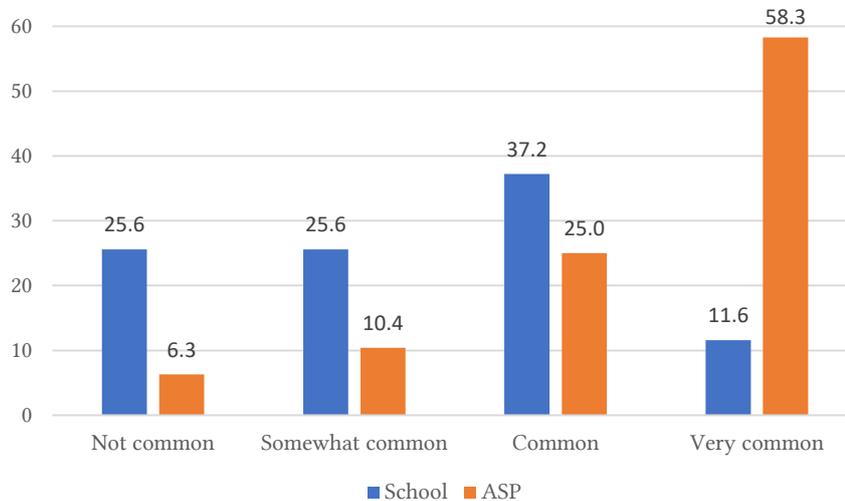


Figure 3: *Availability of individual help by telephone or online upon request at school and at the ASP (%)*

One open-ended question each focused on how the relationship between the ASP teachers and the students and parents had changed since the shift to digital learning ('Please share in a few sentences how your relationship has changed with students/parents due to digital learning'). Forty-six out of the 48 surveyed responded to both questions (see selected responses below). Some ASPs reported that there were mentees that they could not reach because they did not respond, but the majority of ASPs maintained even closer and more regular contact with students and their families than before, typically every day. They noted that the primary channel of contact was Messenger. The need for ASP assistance on the part of both the students and their parents had clearly grown as regards alleviating the psychological burden and helping with school assignments.

'It [our relationship] with both the parents and children has become closer. They depend on us more. They need our help more than before.'

'We spend more time with them than at the ASP. They (can) reach us from morning to evening. We talk about all kinds of things. We get a glimpse into their everyday life, where they do their homework, what they eat and drink, and the way they talk in the family.'

'We maintain contact more intensively with a lot of parents, mainly in families where the social situation has grown much worse due to the coronavirus.'

Even though the majority of the students enjoy maintaining contact online, it was also reported that it was often difficult to get students to do other tasks after an entire day of school learning in front of the computer screen. Aside from device availability, one barrier that was often mentioned was the lack of personal contact, which was of fundamental importance in maintaining learning motivation, according to the ASP teachers' opinions. Some teach-

ers reported that it was also more difficult to bring in volunteers due to the lack of personal contact, while teachers at other ASPs actually reported the opposite, via the use of online mentoring.

> 'The most important strength of this mode of operation is pushed into the background: personal contact and the strength of the community. That makes work more difficult and produces a greater mental and psychological burden for the children.'

> 'Our students have a particular need for personal contact. It's especially difficult to compensate for the lack of personal interaction. We try to start as many discussions as possible with those we can somehow reach online, not just as regards learning, but also their general well-being and daily activities. We 'go crazy' then too, and send funny images or emoticons and gifs.'

Another closed-ended question, for which we received 45 responses, covered changes in contact with teachers ('Please share in a few sentences how your relationship with the teachers at the school has changed due to digital learning'). An extraordinarily heterogeneous picture was formed in this regard. Some of the ASP teachers reported that the situation had made the school-ASP relationship worse, since consultations primarily occurred in person as they had not managed to move this activity online, or the teachers at the school had become overloaded. However, another common experience was that they had managed to shift the communication with the school teachers online and via the telephone. A number of ASPs reported that the relationship with the schools had improved, with the situation forcing the teachers at the school and the ASP to join forces.

> 'The relationship has been greatly reduced. After all, contact was built on in-person meetings, which can't be replaced online. The two institutions currently operate in parallel.'

> 'Cooperation has greatly increased in this situation. I would say we're in contact weekly, almost daily. After all, we're far more dependent on one another.'

## 6.2 Learning and learning support

In the view of the ASP teachers, the schools' practice of conveying the learning material is extraordinarily varied in terms of frequency. A third (35 per cent) of the respondents reported that schools assign learning tasks one to two times a week, a fifth of them (21 per cent) said this occurred three to four times a week, and the majority of them (38 per cent) said it occurred daily.

As regards the learning tasks assigned by the school and the platforms used, the ASP teachers communicated similar views, while they had the chance to report on their own practices in another block of questions focused on the same aspects. The only difference between the two questions was that the ASP teachers had the option of responding 'Don't know'. We did not display responses from respondents who chose this option so that we could compare the ASPs' and schools' practices of assigning learning tasks more easily (see Table 1). Two to eight per cent of the respondents selected this option for particular statements.

According to the ASP teachers' responses, innovative learning tasks (e.g., internet quizzes, questions for solving on the internet, and videos about particular topics) were used at both types of institution. With regard to the schools, few said this was very common. At the same

time, the views of the ASP teachers paint a varied picture, with around the same proportions, approximately one-third of participants, each saying it was not common, somewhat common, and common. The picture is also heterogeneous in the case of the ASPs. At the same time, they believe that innovative learning tasks are more common among these programmes.

Conventional learning tasks are assigned on digital platforms (e.g., downloadable worksheets and texts with tasks available on the internet) in a similar way in the two types of institutions, although, according to the ASP teachers, this practice is more common in schools. Taking all the different options into account, this is one of the most frequent ways of assigning learning tasks: 75 per cent of the respondents indicated this as being common or very common.

Nearly half of the teachers that were surveyed said that marking learning tasks in course books and workbooks is not common at their ASP. However, this occurred at varying frequency with the other half of the ASPs. In contrast, this practice is significant among schools, with 80 per cent of respondents indicating that they think this is common or very common in school.

Paper-based learning tasks (e.g., photocopies) are virtually never assigned in half of the ASPs, while this practice occurs in both types of institution, but is far more frequent in schools.

Table 1. *Types of learning tasks in school and the ASP based on ASP teachers' perceptions (%)*

| Modality of learning task | Institution | Options | | | |
|---|---|---|---|---|---|
| | | Not common | Less common | Common | Very common |
| Innovative learning tasks sent via a digital platform (e.g., internet quiz, tasks to be completed on the internet and videos on a particular topic) | School | 29.5 | 29.5 | 36.4 | 4.5 |
| | ASP | 6.3 | 25.0 | 35.4 | 33.3 |
| Conventional learning tasks sent via a digital platform (e.g., downloadable worksheets and texts available on the internet supplemented with tasks by the teacher) | School | 10.9 | 13.0 | 54.3 | 21.7 |
| | ASP | 16.7 | 31.3 | 41.7 | 10.4 |
| Course book or workbook tasks, which the teacher assigns through various channels (e.g., telephone, email and Messenger) | School | 8.9 | 13.3 | 40.0 | 37.8 |
| | ASP | 45.8 | 18.8 | 16.7 | 18.8 |
| Learning tasks sent to students on separate sheets or photocopies or fetched from school by students | School | 12.8 | 48.9 | 23.4 | 14.9 |
| | ASP | 43.8 | 29.2 | 8.3 | 18.8 |

## 6.3 Difficulties associated with digital education

We asked questions about what had caused the greatest difficulty for the ASPs in shifting to digital learning. Beyond evaluating the weight of five likely problems (device availability, internet access, digital competency, learning methodology, and use of space), we encouraged respondents to comment on their responses and name other problems as well (see Figure 4 for the frequency of the problems listed).

Learners not having an appropriate learning space proved to be the most widespread problem. Half of the respondents said this was very common among their mentees, and a further 21 per cent found it common. Barely one-eighth of them (13 per cent) saw this as posing no significant difficulty for students.
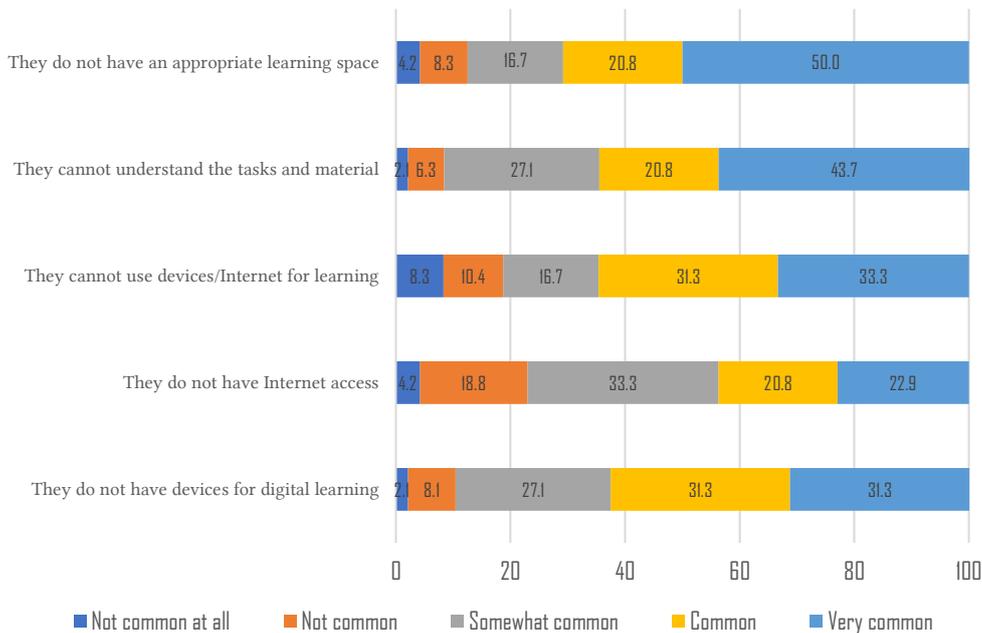
Figure 4: *Difficulties with the shift to digital learning based on APS teachers' opinions (%)*

'One of the most common reasons for this is lack of space. [Students] don't have a spot away from the rest of the family … and [they suffer from] psychological overload from social and family crisis situations due to the coronavirus.'

'The children are not generally alone during their activities. The parents or other family members are in the same room.'

It is not only the absence of an independent space to study. A significant proportion of ASP students lack the knowhow as well. According to two-thirds of respondents, it is common (21 per cent) or very common (44 per cent) for ASP students not to understand learning tasks and material independently. Fewer than one-tenth of them report that they are essentially unaffected by this difficulty.

According to the respondents, it is common (31 per cent) or very common (31 per cent) for two-thirds of the families not to have appropriate devices for participating in digital learning. However, the problem is not significant for a total of one-tenth of them. In addition to the lack of devices, the lack or insufficiency of internet access also proved to be a serious setback, although ASP teachers judged the weight of this problem to be smaller. Forty-four per cent believed that the lack of internet was common or very common among ASP mentees' families, while 23 per cent said they have internet access.

'There's not even one device available. There are no laptops, … desktop computers. A lot of tasks can't be completed on a smartphone. If a child has a phone, there's no internet. There's Wi-Fi at school only (for which the child has a password), but they can't go there.'

'A significant proportion of the families have restricted access to the internet, which is mostly through the parents' telephone. It's not available to the children in a lot of cases, even in the current

situation. We know families where the father has the net on his phone, but he doesn't give it to his children…. internet access is not available for the majority.'

A quarter of respondents noted the lack of digital competencies as being among the most important challenges. The topic was raised in part in relation to the children and in part in relation to their parents, but in some cases the ASP teachers spoke self-critically of their own deficiencies in that area. In that regard, maintaining contact digitally was completely new for a portion of the ASP teachers, while it had been part of others' daily routines – although they had mainly used such platforms for communication prior to the pandemic restrictions, not for learning support.

'It takes a great deal of effort to facilitate an online activity. It won't work without printed materials because the students can't use their device. Without any help, they can't find their way around a particular website. If they can open the link, they don't know what to do next. Often understanding the task causes a problem. So how would they be able to complete it?'

A significant proportion (one-fifth) of the ASPs reported to suffering notably from the lack of personal contact: 'personal contact, the essence of an ASP, doesn't occur.' Combining this with the problem of student motivation, we are faced with difficulties that are as significant as in the areas noted above.

'We can't get them motivated. We even announced an award if they completed the learning tasks we sent them, but it didn't work out. There were only a few kids who cooperated. Keeping up is the biggest problem, as well as motivation.'

School and parental support, environmental difficulties and methodological deficiencies were also noted, although less frequently than the main problems discussed above. As regards school learning, many mentioned students being overloaded and school teacher insensitivity.

'The school is incapable of compromise. Neither families nor teachers are prepared for digital learning, and the children with the weakest skills fall behind peers who both have a device and are capable of progressing independently.'

'Unfortunately, we find the amount of learning material assigned to the students a bit too much. The kids usually can't get through it alone. There are a lot of learning tasks even in the skills subjects that are not in line with the available resources – e.g., a lack of supplies, lack of time, and the amount of work.'

Our exploration of the problems of digital learning was rounded out by another open-ended question ('Are there other barriers connected to digital learning among disadvantaged and/or Roma students?'), which 37 ASP teachers answered. A number of them highlighted that learning time had significantly increased due to the lack of personal contact and that, not independent of this, it was much more difficult to maintain motivation online. These factors are similarly tied to the fact that students with low self-confidence feel that the assigned learning tasks are endless and that they have no chance of completing them by the deadlines. This further reinforces their lack of motivation; indeed, some students experience anxiety as well.

Another frequently noted factor is the lack of regularity and time management skills, which problems are strengthened by the cessation of daily routines. In addition, many ASP teachers noted the lack of an appropriate learning space in their responses, which in this situation the ASP cannot counterbalance. The family's livelihood problems not only surface as stress factors, but the fact that some young people contribute to the family income reduces the energy that can be put into learning.

'With the end of the daily rhythm, children tend to fall apart. They are up till dawn and sleep till noon. Others feel stressed that they can't hand in their homework for this or that reason.'

'Typically, there are many living in one household. It's difficult, if it's possible at all, to create a space necessary for learning. Children typically don't have their own "area" and desk. Lower-school children are in particularly big trouble; they are barely able to learn anything during this period without help from their teacher.'

'When there are a lot of small children in the family, you can't expect them to be quiet for hours just because the big ones are doing their homework.'

'They take advantage of the situation to augment their family's income, and, if they can, they go find work on a daily basis.'

*6.4 ASP teachers' recommendations for increasing the success of digital education*

At the end of the questionnaire, we asked the ASP representatives what recommendations they have to make digital learning successful among disadvantaged and/or Roma children. Naturally, most of the ASP staff mentioned dealing with the most obvious gaps – that is, providing appropriate digital devices and internet access. One-third of the respondents also noted the need to develop digital competencies as a condition of the shift to digital learning. However, opinions differed significantly about the target group for development (e.g., students, mentees, parents, or ASP staff), those responsible (e.g., the school or the ASP), and the ways of implementing it (e.g., mentoring, training, or regular lessons).

'Every student should have their own smart device with internet access. Training should be provided for teachers at the local school, and the school should shift to using a type of secure platform so that students won't have to register on a million surfaces and send their learning tasks in a different format to every teacher. The school should organise one or two additional small-group activities for children who have trouble making individual progress.'

A portion of the respondents called for a deepening of parental responsibility and readiness, while that is precisely what others objected to: the school shifting the responsibility of providing support for the forms of learning used in this extraordinary situation to the family – as one can predict that parents with low educational attainment will not be able to cope with such tasks. There were those who pointed out that it was a wrong-headed approach to focus exclusively on learning in this extraordinary situation, since the problems of impoverishment and, in some cases, hunger, intensified the general insecurity for ASP students' families.

'It's more important that the families involved should survive the months ahead, that they should receive groceries and that they shouldn't lose their housing until they can find work again. Hunger and fear for their very livelihoods represent an even more important problem for the families than the success of digital learning.'

## 7. Conclusion and recommendations

As we expected, ASP staff viewed the lack of ICT devices and internet access as the fundamental problem among disadvantaged families as regards the shift to digital learning, and the families also asked the ASPs for help in large proportions in this regard. We know from the online workshops that a portion of the ASPs actively sought solutions to the problem of providing ICT devices to students. For example, some joined a fundraising campaign, several ASPs organised their own fundraising efforts, and they attempted to remedy the problem with local institutions in some cases.

It is clear based on the online workshops that a significant proportion of the ASPs managed to supply a majority of their mentees with the devices required for digital learning within one to two weeks – although the condition of these varied. Some of the ASPs distributed their own devices. Two kinds of practice took shape. One solution was to donate to the families exclusively lower-quality ICT devices which were still appropriate for use in learning. The ASP thus wished to ensure that they would also have appropriate devices to teach their mentees after the return to conventional learning, and thus avert the problem of those computers becoming unusable in the meantime. The other solution was to lend out devices, the main argument for which was that the families would not be able to use them in the long term anyway due to their low level of digital competency, and that the devices would require maintenance. The risk was that a portion of the better-quality devices would perhaps become unusable for ASP teaching, and thus put the students involved at a disadvantage in the long term after all.

On the positive side, the pandemic has also created a situation in which a small fraction of disadvantaged students have been supplied with ICT devices and the ICT competencies of some of them have been developed. At the same time, the lack of ICT devices and internet access has certainly not been resolved among the majority of disadvantaged students. The initiatives noted above have arguably not satisfied every need. After all, the ASPs only reach a small proportion of children in need.

In the experience of the ASP teachers, the lack of appropriate learning spaces is also a basic obstacle to digital learning, so children in low-SES families may also need to be provided a desk and headset for effective digital learning. Due to the frequent lack of desks, it is worth supplying families in need with laptops or tablets instead of conventional desktop computers.

The ASPs have clearly reached families living in extreme poverty more effectively than schools have, and families have also requested their help. Based on the high proportion of students that the ASPs managed to reach, it is recommended that the use of chat platforms and telephone communication be strengthened at schools to reach students in extreme poverty. The differing patterns of maintaining contact can also be explained by the divergent nature of the two types of institutions, including the differences in the numbers of students. The schools have arguably targeted their strategies for maintaining contact mainly at the middle class, while the ASPs have focused on low-SES families. In addition, we wish to point out that the responses from the ASP teachers are arguably skewed towards framing their own work in a more positive light. At the same time, a comparison of the practices among ASPs and

schools may help with understanding how schools can reach students in similar situations more effectively.

It is abundantly clear that schools use digital content and channels for assigning learning tasks and communicating much like ASPs do. Due to the low digital literacy of students and parents, it may be particularly important to employ carefully selected, well-coordinated and uniformly used digital platforms in assigning learning tasks. It is an important message for both ASPs and schools alike that self-regulation among disadvantaged students, including time management, is weaker than average (for a review, see Palacios-Barrions & Hanson, 2019), which will be a factor of key importance to take into account in a similar situation for maintaining motivation when assigning learning tasks. It is recommended, first, that teachers focus on this area as they help their students (e.g., with daily schedules and lists of things to do, as well as mutually planning time management) and, second, that they avoid an accumulation of learning tasks in their planning. It is worth assigning learning tasks that require less time, more often (which, based on experience, can be steadily increased), regularly checking that learning tasks have been completed, making obligations transparent, and striving to deliver a consistent workload to students. This last point calls for strong cooperation among the teachers of the various subjects.

The lack of skills required for independent learning (e.g., reading comprehension, learning methodology, and digital literacy) represents a fundamental barrier to the success of digital learning, which is applicable to the extreme among disadvantaged students, since there is less likelihood that they will find help in their immediate social environment. Adequate reading skills are of crucial importance both for students and parents. After noting the absence of an appropriate learning space, ASP representatives listed difficulties in understanding the learning materials, and properly using ICT devices and the internet as the most significant obstacles to digital learning. These results coincide with the results of Kende et al. (2021): teachers of mostly disadvantaged students noted the above-mentioned obstacles in the same order. Difficulties with reading and using ICT technologies and the internet for learning purposes are probably connected. The link between reading achievement and socio-economic status is well-established, and the strength of this relationship is especially strong in Hungary (OECD, 2019a; 2019b). Thus, the pandemic situation has made it clear that it is of key importance to strengthen the skills required for independent learning, the development of which must be a priority goal in future. This is because, first, they represent the foundation for effective independent learning, and, second, because such a strategy should halt the further growth in differences (cf. Cooper et al., 1996). The time that has been lost in learning may lead to large differences within individual school classes in students' readiness, so it is particularly important to use teaching methods adjusted to students' individual characteristics. The new knowledge acquired by teachers during digital learning may well form the basis for the application of individually tailored methods. Intervention programmes aimed at mitigating summer setback may serve as examples for ASPs undertaking to improve reading comprehension (e.g., Beach et al., 2018; Kim & Guryan, 2010). In addition, it is recommended that both schools and ASPs regularly use computer-based reading intervention programmes (e.g., Horne, 2017; Jamshidifarsani et al., 2019), as these programmes also support students' digital literacy development.

According to our online workshops with ASP representatives, the majority of ASP teachers found during their own online workshops with mentees that most students and their parents lacked experience in communicating via online platforms. Therefore, ASP teachers decided to use a chat platform, which had its limitations as an educational tool, but was well-known by mentees, and the only difference compared to their normal use was switching on

the camera. A further obstacle at the start of the pandemic situation was that a considerable number of mentees and parents did not have email accounts, which greatly restricted the availability of online platforms that could be used for learning, group work, or leisure-time activities. In addition, a significant number of mentees did not have their own rooms at home, thus they were easily distracted by family members during online sessions. In such cases, ASP teachers were not sure whether mentees would re-join the on-going sessions. Quite often, other family members joined the online sessions as well. Therefore, some ASPs introduced certain rules and protocols to be followed by mentees during online workshops.

Disadvantaged students being confined to their homes not only places their participation in education at risk, but the latter arguably also have to struggle with a psychological burden that is heavier than the average due to the situation of their families' livelihood, a crowded living space, and general uncertainty. This may naturally influence the efficacy of teaching. A family's livelihood-related problems may not only represent stress factors, but the energy for learning is also curtailed by the fact that some of these young people join in the effort to earn an income. According to the online workshops, domestic violence often occurs among the ASP mentees' families. Prevention calls for increased attention as well as points to the necessity of focusing on the family in its entirety in similar crisis situations in an effort to safeguard students' mental health. For example, supplying families with developmental games, board games, and sports equipment as well as with online options that may aid in managing stress, creating a community experience, and providing enjoyable leisure-time activities may ease the psychological burden. A great example of this is the cooking club introduced by one of the ASPs during the pandemic, which involved parents as well. All participants followed the same recipe in preparing a meal, and then shared the images of the food they cooked with each other. Another example was a five-week challenge for mentees to help manage their emotions. Mentees were given tasks that were related to recognizing emotions and coping with stress.

This research is not representative, and was launched at an early stage of the transition to digital learning. Thus, favourable changes may have taken place as regards technological conditions, ICT competencies, and educational practice following our period of data collection. In addition, the questionnaire was supposedly completed by mainly those ASP teachers that were better prepared and more motivated to engage in digital education, thus the results may paint a more favourable picture of the work of ASP teachers than the reality, further limiting the generalizability of our findings.

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# An exploration of coronavirus-related online antisemitism in Hungary using quantitative topic model and qualitative discourse analysis

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## Abstract

Soon after the outbreak of the pandemic, antisemitism connected to the coronavirus appeared in the world. In our research we analyzed a large Hungarian online text corpus from December 1, 2019, to July 10, 2020 to examine whether coronavirus-related antisemitism was present in the Hungarian online space, and if so, what its content was. We differentiated between two layers of communication: the professionalized layer represented by online articles, and the lay one represented by comments and posts. After providing the conceptual background regarding conspiracy theories and conspiratorial- and coronavirus-related antisemitism, we present the mixed-method approach that we employed. This approach includes quantitative LDA topic models, human annotation, and the qualitative analysis of various discourses. Our research indicates that coronavirus-related antisemitism appeared in the Hungarian online space at the very beginning of the pandemic. However, at this time, until July, it was present almost solely at the lay level. Its content was mainly related to various tropes (conspiracy theories) about Jews. However, additional content was also identified. Based on our results and international examples, we propose a comprehensive typology that proved to be a suitable means of analyzing coronavirus-related antisemitic content.

**Keywords**: coronavirus, antisemitism, conspiracy theories, LDA topic modeling, Natural Language Processing (NLP), annotation

## 1. Introduction

The low level of personal control, uncertainty, and growing economic and social despair that have undoubtedly been present throughout the coronavirus pandemic increased belief not only in conspiracy theories in general (Van Prooijen & Jostmann, 2013), but Jewish conspiracy theories in particular (Kofta et al., 2020). Therefore, it was not surprising that simultaneously with the outbreak of the pandemic, conspiracy theories linking Jews to the virus appeared. Already by the end of March 2020, the Anti-Defamation League (ADL), which fights antisemi-

tism[1] and all forms of racism, was reporting cases from many places in the world where Jews, Zionists, or Israel had been accused of having developed or spread the virus (Anti-Defamation League, 2020b).

It is not unprecedented that Jews are accused of deliberately spreading diseases. The best-known example is the time of the Black Death (1347–1352), when Jews were accused of poisoning wells to spread the disease (Cohn Jr, 2007; Laqueur, 2008, pp. 60–62; Simonsen, 2020, p. 359). As described later, these examples have been followed by many others throughout history.

Our research examined a large text corpus of Hungarian-language online articles and comments/posts to scrutinize coronavirus-related antisemitism. It is well known that the internet is of paramount importance in disseminating conspiracy theories (Vicario et al., 2016; Slavtcheva-Petkova, 2016; Klein et al., 2018). This fact justifies an examination of online sources with regard to their prevalence and content. Additionally, in Hungary, as in other Visegrád countries, conspiratorial antisemitism is the most prevalent type (Kofta & Bilewicz, 2011; Kofta & Sedek, 2005; Barna et al., 2018; Kofta et al., 2020; Tarant, 2020).

Our corpus contains articles, comments, and posts written in Hungarian and published between December 1, 2019, and July 10, 2020, in which the different forms of the word coronavirus and that of Jew appear simultaneously. In our research, it was an important decision to keep the corpus of articles and that of comments and posts separate, as they represent different layers of communication. We treat articles as the professionalized and posts and comments as the lay channel of communication. We hypothesize that there will be a difference in the topics and discourses in these two layers. We know when the epidemic started, thus we have a 'zero-point' that makes the subject of coronavirus-related antisemitism particularly relevant in an exploration of the differences between these layers, and later, the interactions between them. Our paper aims to answer three research questions: (1) When did coronavirus-related antisemitic discourses appear in the Hungarian online space? (2) What is their content? and, (3) Are there differences between the different layers of communication?

As our corpus contained a vast amount of unstructured textual data, we used quantitative topic models from the field of Natural Language Processing (NLP) (Németh et al., 2020). First, we mapped the latent thematic structure of our corpus using LDA (Latent Dirichlet Allocation) topic models. Second, we used qualitative approaches to describe these topics and scrutinize the antisemitic narratives connected to the coronavirus pandemic. In the final step of our analysis, we created a comprehensive typology and used it as an analytical tool to scrutinize the coronavirus-related antisemitic discourses.

## 2. Conceptual and social context

### 2.1 Conspiracy theories

Defining conspiracy theories is not as simple and straightforward as it seems. According to Douglas and Sutton (2008), conspiracy theories are 'attempts to explain the ultimate cause of an event (usually one that is political or social) as a secret plot by a covert alliance of influential individuals or organizations, rather than as an overt activity or natural occurrence.' If one looks at representative surveys examining the prevalence of conspiracy theories, the

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[1]    In line with the International Holocaust Remembrance Alliance (IHRA), we spell antisemitism this way (IHRA, 2020).

large proportion of believers is striking. Scholars have identified three motives behind a belief in such theories. The desire to find a causal explanation and to understand the world is one form of epistemic motives. Existential motives are connected to a persons' desire to be safe and control their environment. Finally, social motives are motivated by the 'desire to maintain a positive image of the self or group' (Douglas et al., 2017, p. 538).

According to a nationally representative survey carried out in 2018 (Political Capital, 2018), a significant proportion of the Hungarian population believe in various conspiracy theories. The authors categorized such ideas into larger groups, like superstitions, non-political-, pro-Russian-, anti-government-, or antisemitic views and statements connected to a conspiracy mentality. The research revealed that these ideas are widespread, and political and non-political theories are strongly correlated. Political affiliation has the most substantial effect on most categories, excluding superstitions. For example, pro-government respondents tend to believe in anti-Muslim and anti-Western statements, and those related to George Soros. At the same time, leftists are more likely to agree with anti-government statements. While the highest average acceptance rate occurred in relation to conspiracy mentality statements (for example, 65 per cent of the population believe that 'Politicians often do not explain the real motive for their decisions'), the second-highest proportion concerns antisemitic theories. For instance, 49 per cent of respondents believe that 'Jews want to gain a decisive role in international financial institutions.'

## 2.2 Conspiratorial antisemitism

Alleged Jewish conspiracies have been present in anti-Jewish sentiments and antisemitism throughout history. Although anti-Jewish sentiments have been present since the very beginning of Christianity, the demonization of Jews intensified from the High Medieval Period onwards. 'It was claimed that the Jews operated as a collective and evil unit, secretly plotting against Christianity and Christian society' (Simonsen, 2020, p. 358). Besides other claims, like the accusation of ritual murder and host desecration, one of the enduring types of conspiracy theories also appeared at this time – the idea that Jews spread disease.

In the fourteenth century, Jews were held responsible for spreading leprosy, which in many places led to pogroms. Later in the same century, at the time of the Black Death, Jews were accused of poisoning wells to spread the disease. Both types of accusations led to brutal massacres of Jews, and, in some cases, to the expulsion of entire Jewish communities (Barber, 1981; Laqueur, 2008, pp. 60–62; Kaplan, 2011).

Enlightenment brought about considerable changes. Religion began to lose its all-pervasive power and influence in society; secularization was on its way. Religion, the central element of antisemitism, was replaced with race. 'For anti-Semites […], the "polluted" racial character of the Jews served […] as a basis for hating people whose distinctiveness could not readily be discerned. The unacculturated Jew was a visible enemy, the acculturated one […] as insidious, camouflaged, coiled to strike at European society within' (Berger, 1986, p. 11).

At the beginning of the twentieth century, in Tsarist Russia, a forgery called the *The Protocols of the Elders of Zion* was published. This book became the basis for conspiracy fantasies about Jews who aimed at world domination and creating a New World Order. Contemporary conspiratorial antisemitism's central tropes can be traced back to the Protocols (Byford, 2011, pp. 49–57).

Racial antisemitism and conspiracies connected to Jews were widely exploited by the Nazis. Moreover, Nazi propaganda continued to use the image of Jews as spreaders of disease.

Connected to typhus, they argued that having any contact with Jews increased exposure to lice and thus to typhus. Consequently, Jews were portrayed as a dangerous threat to public health, which served as justification for enclosing Jews in ghettos (Grabowski, 2009). However, in Nazi ideology, conspiracy fantasies connected to biology appeared in a new way when Jews themselves were portrayed as parasites – as 'carriers of infection, germs, bacillus, microbes, etc., which attack the organism and poison it' (Burrin, 2013, p. 226). In the widely distributed film *Der ewige Jude* (The Eternal Jew), Jews were depicted as disease-bearing rats (Hartman, 2000; Grabowski, 2009). In this way, Jews were animalized and equated with organisms 'which are among the least anthropomorphous in the animal kingdom' (Burrin, 2013, p. 227). The animalization and demonization of Jews has played an essential role in spreading even the most absurd conspiracy theories, since the latter allows people to depict Jews as non-human beings about whom anything is conceivable, and with whom anything can be done.

The relationship between Jews and disease remained the basis of numerous antisemitic conspiracy ideas after the Holocaust. To mention a few examples, in 1953 a series of show trials were held against Jewish doctors in the Soviet Union, in which they were accused of murdering prominent communist leaders (Rapoport, 1991). Also, Jews have often been blamed for using viruses and diseases (especially HIV or AIDS) for their evil purposes. Among the accusers, we find various actors: Hamas leaders (The Times of Israel, 2017), ministers and representatives of the Palestinian Authority (Wistrich, 2002, p. 34; Karsh, 2006, p. 9), other Arab leaders (Wistrich, 2002, p. 31; 2010), black extremists (Los Angeles Times, 1988; Wistrich, 2010; Heller, 2015), and media personalities (Wistrich, 2010).

In Hungary, the measurement of antisemitism based on surveys with nationally representative samples dates back to the mid-1990s, and surveys have been carried out regularly ever since (Kovács, 1996; 2002; 2011; 2012). Using the same methodology, Medián Public Opinion and Market Research Institute, commissioned by the Action and Protection Foundation, has conducted annual surveys on antisemitism between 2013 and 2018 (Action and Protection Foundation, n.d.). Moreover, in 2020 the Action and Protection League conducted a survey on antisemitism in 16 European countries including Hungary. The research was led by András Kovács.

According to this latest poll, 42 per cent of the Hungarian population harbored antisemitic prejudices; 18 per cent were labeled moderately, while 24 strongly antisemitic. When measuring the content of antisemitism, various types of antisemitism are examined, such as religious anti-Judaism, conspiratorial-, secondary-, and new antisemitism. In 2020, 39 per cent of respondents agreed with the statements that: 'There is a secret Jewish network that influences political and economic affairs in the world.' Almost the same proportion of respondents (38 per cent) thought that 'Jews have too much influence in Hungary.' Moreover, little more than one-fourth of respondents (27 per cent) believed that 'Jews are more inclined than most to use shady practices to achieve their goals.' Comparing this data to the prevalence of other types of antisemitism, it can be stated that conspiratorial antisemitism is the most widespread type in Hungary (Kovács & Fischer, 2021).

## 2.3 Coronavirus-related antisemitism

Antisemitism connected to the coronavirus appeared very early during the pandemic. In an interview with The Times of Israel, Alex Friedfeld, a researcher with the Anti-Defamation League's (ADL) Center on Extremism, claimed that antisemitic conspiracies connected to COVID-19 began to spread as early as in January 2020 (The Times of Israel, 2020a). Many

of the countries involved belong to the Arab world (for example, Egypt (MEMRI, 2020a), Syria (MEMRI, 2020a), Iraq (MEMRI, 2020b), Jordan (MEMRI, 2020c) Yemen (Anti-Defamation League, 2020c), Lebanon (MEMRI, 2020d), Saudi Arabia (MEMRI, 2020a) and, not surprisingly, Iran (Anti-Defamation League, 2020c; The Jerusalem Post, 2020b) can also be mentioned here. In these countries, high-profile state and government officials have repeatedly formulated antisemitic conspiracies related to the pandemic. At the time of writing, only one similar case had occurred in Eastern Europe – when far-right Polish MP Janusz Korwin-Mikke compared the coronavirus to pogroms against Jews, which were good for them as they assisted natural selection (The Jerusalem Post, 2020a).

A little later, starting in March 2020, the spread of coronavirus-related antisemitism was documented on social media platforms like Facebook, Twitter, and Reddit. Moreover, conspiracies were also propagated on Telegram and Gab, which are favorite platforms among extremists banned from mainstream social media (Anti-Defamation League, 2020a; Ehsan, 2020).

In April 2020, anti-lockdown protests began. In Ohio, some demonstrators held up antisemitic pictures showing a blue rat with the Star of David painted on its side and the words 'The Real Plague' (cleveland.com, 2020). At protests against measures and restrictions, Holocaust trivialization (Gerstenfeld, 2007) was a frequent phenomenon. In May, in Chicago, a protesting woman held a sign that read '*Arbeit macht frei*, JB[2]' (BuzzFeed News, 2020). It also happened several times – for example, in Idaho (Boise State Public Radio, 2020), Illinois (BuzzFeed News, 2020), and Michigan (The Times of Israel, 2020b) – that state governors were compared to Hitler at anti-lockdown protests or, as occurred in Idaho (The Independent, 2020) and Pennsylvania (The Philadelphia Inquirer, 2020), directly by their political opponents.

Holocaust trivialization also appeared in Europe. In Germany, at anti-lockdown and anti-vaccination protests, '[m]any protesters pinned yellow Stars of David to their chest to suggest that they are victims of persecution similar to that suffered by Jews during the Nazi era. The stars often say "vaccination will set you free" in reference to the cynical Nazi slogan "*Arbeit macht frei*"' (Jikeli, 2020, p. 9). One case went viral on the internet: when an anti-lockdown protester in the German city, Hannover, compared herself to Sophie Scholl[3] (Deutsche Welle, 2020a). At another gathering, an 11-year-old girl explained that she felt like Anne Frank as she had to 'celebrate her birthday in secret in order to avoid being snitched on by the neighbors' (Deutsche Welle, 2020b).

The phenomenon of antisemitism and Holocaust relativization in the wake of the coronavirus pandemic has been addressed by several organizations (European Jewish Congress, 2020; European Union Agency for Fundamental Rights, 2020; World Jewish Congress, 2020). Moreover, the seriousness of the phenomenon is clearly illustrated by the fact that the European Union has specifically addressed the rapid spread of antisemitism related to the pandemic, besides other forms of disinformation.[4] However, due to the relatively short time since the outbreak, there have been only a few academic publications on the topic (Jikeli, 2020; Teter, 2020).

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2    JB refers to Illinois governor, JB Pritzker, who is of Jewish descent.

3    Sophie Scholl was one of the founding members of the White-Rose non-violent resistance group in Nazi Germany between 1942 and 1943. The latter wrote and printed anti-Nazi flyers and distributed them in several major cities in Germany and Austria. She was found guilty of high treason, along with her brother and another member of the organization. As a result, they were executed in 1943.

4    European Commission, 2019.

## 3. Corpus and methodology

*3.1 The corpus*

In our research, we analyzed articles and comments written in Hungarian on various web- and social media sites between December 1, 2019, and July 10, 2020. We used the SentiOne social listening platform to obtain our corpus, which gathers content from thousands of websites, blogs, forums, and social media platforms, making them searchable using keywords and metadata.[5] We created two sub-corpora by using a complex query: we downloaded all articles and comments that contained the word 'Jew' and the name of the coronavirus simultaneously in any form.[6] Our first sub-corpus contains comments and social media posts,[7] while the second contains articles.[8] Although we used the same set of keywords to acquire both, we kept these corpora separate. This separation is essential for both analytical and methodological reasons. We have already dealt with the analytical reasons in the Introduction. From a methodological point of view, the separation is justified because articles and comments differ very much in average length and style. Therefore, it is advantageous to run separate topic models on them.

Using the query mentioned above resulted in a lot of content that was not interesting, as it included texts with content about Jews and the coronavirus that was not at all antisemitic. Before running the models, we wanted to get rid of this noise. However, there were two types of noise; one could be easily identified, while the other required a more sophisticated approach. Let us see the first. After the initial analysis of the two downloaded corpora, we found that comments and posts containing antisemitism could be found on almost any website or platform. However, in line with our preliminary assumption, there are outlets on which such articles with such content certainly do not appear. Thus, in the case of the articles we filtered out these websites, such as *HVG.hu*, *24.hu*, and *Index.hu* (which are the among largest independent online newspapers in the country), and some Jewish portals (for example, *Neokohn.hu* and *Zsido.com)*. It is important to point out that in this process we only removed those outlets that we know well, and on which it is certain that no antisemitic content could appear. On the list of the remaining portals, mostly right-leaning and far-right both national and regional portals are found, such as the far-right Nemzeti.net and Kuruc.info, and the right-wing Mandiner.hu, Magyarnemzet.hu, and Origo.hu. There are also some Hungarian websites from neighboring countries, like Ujszo.com and Felvidek.ma in this sub-corpus. As mentioned above, identifying meaningful content also required a more sophisticated step: the human annotation of the texts and selecting topics that most probably contain antisemitic content. This procedure will be described in detail later.

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5   SentiOne uses ongoing scraping and provides access to data for the past three years from the date of download in compliance with GDPR regulations.

6   We used the following queries: (korona[corona]* AND vírus* AND zsidó[Jew]*) OR (koronavírus* AND zsidó*) OR (zsidó* AND covid*) OR (zsidó* AND vuhan[Wuhan]*) OR (zsidó* AND sars*) OR (zsidó* AND 2019-ncov*). Asterisks mean that these words could have appeared by themselves, as part of other words, or in inflected forms in order for a document to be treated as a valid finding.

7   This sub-corpus contains 11,593 comments and posts obtained from 88 websites and blogs. More than one-third of the content is from *Kuruc.info* (one of the oldest far-right portals in Hungary). Among the five largest sites, *HVG.hu* (one of the largest independent, left-leaning news sites), *Facebook*, and *PestiSrácok.hu* and *Vadhajtások.hu* (the latter are two radically pro-government portals) can also be found, responsible for more than 82 percent of the corpus' documents together with *Kuruc.info*.

8   The article corpus contains 1,702 documents from 270 websites.

There was another issue we had to address. Due to the extraordinarily centralized and controlled nature of the Hungarian media (Bajomi-Lázár, 2017; Krekó & Enyedi, 2018; Leonárd et al., 2019; Polyák, 2019; Griffen, 2020), much duplicate content appears – for example, on the various pro-government websites owned by CEPMF,[9] especially on regional news sites. In this research we aimed to examine the content of coronavirus-related antisemitic discourse, not the impact certain websites or groups of websites achieve. Keeping these duplicates would have negatively affected the performance of our models and would have worsened model interpretability. Therefore, we removed them manually with the help of an initial topic model, keeping only one copy of such content. The final corpora used for annotation contained 11,593 posts and comments and 1,702 articles after the so-called preprocessing[10] phase, which is required for the topic modeling algorithm to perform properly.

*3.2 Topic models*

As we needed to analyze vast amounts of textual data, it was necessary to employ automated text analytics methods; namely, topic models as used in Natural Language Processing. Latent Dirichlet Allocation (LDA) in an unsupervised[11] statistical model aims to unfold the latent thematical structure of a given textual corpus. LDA's base concept is that (1) every document is a mixture of a number of topics; and, (2) every word in a document can be assigned to one or more topics. Thus, LDA detects the co-occurrence of words based on two assumptions: a given topic can be characterized by the words assigned to it, and a document that belongs to a given topic is more likely to contain the words assigned to that topic (Blei et al., 2003; Blei & Lafferty, 2009; Németh et al., 2020, pp. 55–56; Németh & Koltai, 2021, pp. 14–16). Using LDA, the researcher must decide the number of topics before running the model, which is often a challenge. We used the so-called  topic-coherence metric (Röder et al., 2015) to decide the number of topics appropriate for the given corpus. We also evaluated the models based on their interpretability. To create the models, we used the LDA Mallet implementation (McCallum, 2002) via the Gensim Python package (Řehůřek & Sojka, 2010).

In our research, we used topic models for two purposes: (1) to select topics containing a lot of coronavirus-related antisemitic content; and, (2) to map the latent thematic structure of the filtered corpus. For the first goal, the use of topic models was combined with human annotation.

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9    The Central European Press and Media Foundation (CEPMF or KESMA in Hungarian) is a foundation created by the Hungarian government in 2018 that owns more than 450 pro-government media outlets.

10   During the preprocessing phase, the raw text is transformed into text suitable for running the models of Natural Language Processing. For this research, we (1) lemmatized the text, keeping only adjectives, adverbs, nouns, and proper nouns, (2) ran a Named Entity Recognition algorithm, (3) ran significant bi- and trigram detection, (4) removed stopwords that would not be meaningful in the model, and (5) removed overly short, overly rare, and overly common words. During these steps, the length of the documents was reduced. Since LDA, the topic model we used, is not able to deal with excessively short texts, we removed every document of less than five words in length.

11   In the case of unsupervised machine learning methods – as opposed to supervised algorithms – the input data does not contain variables or labels added by human annotators that can be used for classification. Unsupervised methods look for previously undetected patterns in the dataset and use no to minimal human supervision.

*3.3 Annotation*

As already mentioned, we used human annotation to label our documents. To do this, we worked together with fourteen university students.[12] In the first step, annotators participated in online training. They were introduced to the research topic – namely, antisemitism, and emphasis on conspiracies connected to Jews. Next, researchers presented the aim and the methods of the research. Finally, the researchers described the annotators' tasks. We used a simple coding scheme, distinguishing four different types of content: (1) coronavirus-related antisemitism, (2) antisemitism not related to the coronavirus, (3) content that does not contain antisemitism, (4) 'I cannot decide.' Annotation started with a pilot phase whereby the researchers closely followed the annotators' work; mistakes were identified and thoroughly discussed. Moreover, all documents coded with (4) were assigned to the proper category by the researchers and discussed with the annotator. This procedure remained in effect throughout the annotation process. In this way, the use of this coding scheme had a positive impact on the quality of annotation and provided an opportunity to train the annotators further.

The annotation was carried out on two topic models. The first one, with 26 topics, was created on the first sub-corpus containing comments and posts, while the second one, with 21 topics, on the domain- and duplicate-filtered version of the second sub-corpus containing articles. Every annotator received one topic at a time and annotated, on average, forty percent of the documents in that topic. Furthermore, in the case of the posts and comments, at least 100, and in the case of the articles, at least 20 documents were annotated in each topic. According to how well they represented the given topic, documents were sorted in descending order, meaning that at the 'beginning' were documents very much characteristic of their topic, while at the 'end' were documents less typical of the given topic. Half of the annotated documents were from the beginning of each topic, while the same number from the end. Furthermore, annotators received the raw text of the documents without images and formatting. However, we included the link to the original source to enable checking of the context of a comment in case it was ambiguous. Annotators were instructed to visit the original source only if it was absolutely necessary.

In the case of the first sub-corpus, annotation revealed four topics in which the proportion of coronavirus-related antisemitic content was relatively large.[13] In our final analyzed corpus of posts and comments, we included all documents from these four topics and all documents labeled by annotators as (1), meaning that they contained coronavirus-related antisemitism. This procedure yielded 2,743 posts and comments overall. Using this final corpus, we ran additional topics models based on the interpretability of the topics and the abovementioned coherence metric. We decided to use a model with 12 topics for our analysis. However, according to the annotation, the proportion of documents containing coronavirus-related antisemitism was very small in all topics in the case of the articles. Therefore, we did not create a new model for the analysis. Rather, we went on to further analyze the one used for annotation purposes.

## 4. Results

As mentioned earlier, first, we examined the latent thematic structure of the corpus of comments and posts, and then that of the articles. Second, based on the literature and the results

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12    We are very grateful to the BA students who did the annotation.
13    The proportion of such content ranged from 11 to 31 percent of annotated documents in these topics.

of the first step, we created a comprehensive typology and used it as an analytical tool to scrutinize the coronavirus-related antisemitic discourses.

## 4.1 The latent thematic structure of the corpus

In the case of the comments and posts, we created twelve topics, as mentioned earlier. Thanks to the  pre-filtering of the corpus, we found a large proportion of antisemitic content in basically all topics. However, it was not uniform what amount of coronavirus-related antisemitism they contained.

### 4.1.1 Comments and posts

There were four topics in which antisemitism connected to COVID-19 prevailed. One of these topics deals with the role of China and the US in the pandemic, with the US allegedly being ruled by Jews. The coronavirus is portrayed many times as a biological weapon of the US, and ultimately that of the Jews, against the Chinese. This conspiracy myth is indicated by the frequently used expression 'Jewsa' *(zsidó USA)*.[14] Although some comments identify the responsibility of the Chinese, most of the comments hold the US responsible. With regard to this topic, there are many comments from the beginning of the pandemic when the US was not yet affected; thus, it was still plausible to believe in the latter's responsibility. Conspiracies connected to Bill Gates (BBC News, 2020) and Dr. Charles Lieber (Reuters, 2020) are present. In these comments, Bill Gates, who is not of Jewish descent, is, of course, portrayed as a Jew. According to this topic, Americans and Jews are using the coronavirus to defeat their enemies and economic competitors. Another topic characterized by the strong prevalence of coronavirus-related antisemitism concerns the disease itself. Here, it is often claimed that the coronavirus, like other diseases in the past, was created by the Jews for financial profit or to help them rule the world, or, on a local level, Hungary. However, we also find comments that portray Jews as the virus itself, or as parasites that spread the virus. In the next topic in this group, no specific issues are found. Instead, the only thing that characterizes almost all the comments here is their overtly antisemitic nature. According to the latter, the Jews and Israel developed or spread the virus and caused the pandemic for various reasons: financial gain, world domination, or – according to one of the comments – as Jews' revenge on non-Jews. The last topic among those containing much coronavirus-related content deals with various global issues, such as climate change and global warming, along with the pandemic. Some of the comments here make not only the Jews but also the Chinese responsible for the virus. These comments use the following phrases about the Chinese: 'yellow Jews,' 'the Jews of the East.' In these, the adjective Jewish appears as a measure of the degree of evil. Interestingly, we find many ironic comments in this topic. The reason is most probably the fact that this topic is associated with very absurd conspiracy ideas, and ironic comments caricature and make fun of just these.

The next group of topics includes those in which, although there is still a significant proportion of antisemitism related to the coronavirus, we find many 'simply' antisemitic comments. There are three topics in this group. One of them deals with foreign and world politics, of course using the language of conspiracy theories. There are comments and posts about the power secretly running the world, and about the New World Order. Bill Gates and George Soros are frequent actors in these texts. One of the topics in this group deals mainly with the nature of the virus, quarantine regulations, and the protective measures certain countries,

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14    Although there are those who use the English term, use of the Hungarian one is more common.

including Hungary, are taking against the coronavirus and how good they are. Expressions about Jews include 'Jewish coronavirus,' 'large Jewish pharmaceutical companies,' and 'the Jewish pharmaceutical business.' We also find comments from Kuruc.info[15] here connected to Holocaust denial that use the world *holokamu* ('holohoax') and make 'ironic' remarks about the six million Jews that were killed in the Holocaust. In this group, we find a topic that mainly deals with the Hungarian coronavirus situation. Many comments and posts in this topic are irrelevant to us now. However, those that are not irrelevant mostly talk about opposition politicians, some of them allegedly Jewish, who are helping the Jews profit from the pandemic. Finally, the last topic in this group is very much connected to Israel. Jews are equated with Israel and Zionists who are developing and spreading the coronavirus to rule the world. Some comments argue that using migration for the very same purpose did not prove to be successful enough; therefore, Jews created the coronavirus.

There are three topics that are overtly antisemitic; however, their content is rarely connected to the coronavirus. These topics are closely related to the Hungarian situation, including that of the health system and Hungarian politics. Finally, there is a topic that is also only loosely tied to the pandemic, but which is very different in content from any other topic. It contains nothing but obscene and vulgar text. In this topic, the words 'Jew' and 'Gypsy' are used as swear words. The topic contains many comments from the pro-government website *vadhajtasok.hu*, which is known for using radical, far-right language.

### 4.1.2 Articles

The annotation of the articles showed that most of the articles containing our search terms were not antisemitic and thus were not characterized by coronavirus-related antisemitism either. Therefore, we analyzed the initial topic model with twenty-one topics in this case.

A detailed analysis of the topics showed that antisemitic content, and consequently coronavirus-related antisemitism, was relatively rare. We expected this result based on the annotation. However, this was surprising if we consider that the corpus of articles contained only those domains where there was a chance for antisemitic content to appear, especially considering that a substantial proportion of the articles came from various radical and far-right portals.

We were able to identify several antisemitic articles, but the topics were mostly a mixture of antisemitic and non-antisemitic content. However, what is striking is that four topics out of the twenty-one deal with George Soros. Knowing about the government's anti-Soros campaign (Barna, 2019; Kalmar, 2020; Plenta, 2020), it is not surprising that, in addition to the traditional far-right portals (for example, *kuruc.info, and nemzeti.net* [national.net]), these topics also involved articles from radical pro-government news sites such as *origo.hu, vadhajtasok.hu*, and *pestisracok.hu* (boysofpest.hu). Three out of the four topics dealing with Soros are about the 'standard' issues of the anti-Soros campaign.[16] However, in one of the topics,

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15  Kuruc.info is one of the oldest and most commonly visited Hungarian far-right, nationalist news portals. Kuruc.info was the tenth largest news site in 2018, with 10 percent of the population at least occasionally visiting the portal (Mérték Media Monitor, 2018, p. 36). The website has sub-pages named 'Anti-Hungarianism,' 'Holohoax,' 'Gypsy-crime,' 'Jewish-crime,' and harbors strong antisemitic and anti-Romani content. The name of the portal involves strong symbolism, since 'Kuruc' is the name of the armed rebels who fought for independence from the Habsburgs.

16  Examples: Soros is a stock-market speculator whose aim is to exploit the unstable economic situation caused by the pandemic. There are 'Soros organizations and foundations whose aim is to attack and discredit Hungary and the Hungarian government. There is an international smear campaign against Hungary directed by Soros.

Soros is described as someone who financially benefits from the pandemic. Moreover, some of these articles directly refer to Soros' Jewish origin by mentioning that he was shamefully involved in confiscating Jewish goods during the Holocaust. Furthermore, these pieces were published on the aforementioned pro-government news sites, part of CEPMF, contradicting the government's frequent claim that they are not interested in the fact that George Soros is Jewish (Telex.hu, 2020).

*4.2 A typology for analyzing coronavirus-related antisemitic content*

In the next step of our analysis, we created a typology based on our results, as described above, and the aforementioned examples from around the world. Since our aim was to create a typology that could be used in an international context, we considered it important to include international cases that were not present in Hungary during the period under study.

We distinguished two primary dimensions. The first dealt with the various roles Jews can allegedly play, while the second addressed the aims they purportedly have. In this chapter, we describe the types and subtypes for each dimension, and provide examples of each. Where possible, the examples come from our own research, but some types were not present in our corpus.

4.2.1 Types of roles

We identified three types of roles. It should be noted that although there were many comments in which it was evident that the Jews were being blamed for the coronavirus, it was not clear what role they played; whether it was they who had created or spread the virus, or both. For example, commenters referred to the virus as the 'present from the God of the Jews' (Kuruc.info, 2020c)[17] or 'Jewish subversive work' (Vadhajtások.hu, 2020a).

*Jews created or engineered the coronavirus or contributed to its development*

One of the central tropes of antisemitic conspiracy theories about the coronavirus is that Jews created the virus or were involved in its development. There are many examples of this in our corpus too. For example, when the virus is described as an 'artificial Jewish virus' (Kuruc.info, 2020m) or in claims that 'SARS-CoV-2 is an artificially created virus developed by the Jewish USA!' (Kuruc.info, 2020q).

*Jews spread the coronavirus*

The next common trope is that Jews spread the coronavirus. There was open reference to this in our corpus when a commenter, in connection with the pandemic, described Jews as 'well poisoners' (Kuruc.info, 2020l). In this type, the Nazi idea that Jews are the virus themselves or parasites that spread the virus appeared. Examples from our corpus included a description of Jews as 'infinitely vile, two-legged parasites' (Kuruc.info, 2020l) and 'not only parasites of the nation, but also pathogenic agents and spreaders of diseases' or 'the Jewish race as a parasite' (Kuruc.info, 2020j).

There is another sub-type here that involves the claim that Jews spread the virus by not complying with the measures and restrictions that have been imposed. In our corpus, these accusations came up in comments about Israel. For example, 'perhaps through their rabbinic scholars, they could also declare their further intentions with the coronavirus. Or perhaps

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17    In the case of the examples in this chapter, the article under which the quoted comment appears is referenced.

persuade conservative Jews (who have two preoccupations: childbearing, and the study of the Torah) to adopt some hygienic norms now, not living in antiquity anymore' (Kuruc.info, 2020n).

Moreover, Jews can spread the virus in a figurative sense. According to these ideas, immigration, thought to be promoted by Jews, is a source of the pandemic. For example, one commenter claimed that the disease is spread by migrants who have been released into the country by 'retarded Jews' and their '*libsi*[18] buddies' (Vadhajtások.hu, 2020a).

We can also find examples in which the two roles described above are combined. For example, 'This has nothing to do with the Chinese. The virus escaped from a level 4 laboratory maintained by the Americans under the command of the Zionists. […] In October, Bill Gates was in Wuhan' (Kuruc.info, 2020g). 'In the fall, there will be a "second wave" only if Rothschild manufactures and discharges it again' (Kuruc.info, 2020p). 'Interestingly, epidemic centers have developed in countries that stepped up against the USA, and the emerging money-cartel and world government' (Kuruc.info, 2020g).

*Jews as victims*

Various types of content are classified into this group. The first to mention is Holocaust promotion (Gerstenfeld, 2007), meaning that the coronavirus is portrayed as a tool for finishing the Holocaust, or implicitly referring to the Holocaust as a means of killing Jews. For example, a commenter claimed that a virus that combined the coronavirus and Ebola 'would lead to a massacre with six million dead wearing kippah in one or two months for sure' (Kuruc.info, 2020k), or when a commenter wrote that 'I would like to watch as the big-nosed jump into the furnace' (Kuruc.info, 2020f). There was a comment that ironically questioned whether Jews could also be victims of coronavirus, while simultaneously denying the Holocaust: 'the coronavirus won't even tickle those who have survived the gas chambers multiple times' (Kuruc.info, 2020b).

Three other types may be classified into this category based on international examples. However, there was no such content in our corpus. The first of the former was connected with calls for the coronavirus to be weaponized: in the US and the UK white supremacists and far-right extremists encouraged their members to spread the coronavirus among Jews (and in non-white neighborhoods) (ABC News, 2020; Ehsan, 2020). The next is when the virus is described as God's punishment of the Jews. For example, when Rick Wiles, a far-right American political commentator and conspiracy theorist, said, 'God is spreading the coronavirus in synagogues as a punishment for opposing Jesus' (Right Wing Watch, 2020). And finally, the coronavirus is seen as 'the precursor to societal collapse, revolution, and race war' (Anti-Defamation League, 2020a). Some extremists in the US who refer to themselves as 'accelerationists' believe that 'our current globally-connected, pluralistic society is irredeemable and "degenerate"' (Southern Poverty Law Center, 2020). They hope that 'the coronavirus sparks the boogaloo, which many believe will create the opportunity to build a white ethnostate' (Anti-Defamation League, 2020a).

4.2.2 Types of aims

We distinguished four types of goals. It is important to note that there was content for which it was not possible to decide what the purpose of the Jews was according to the commenter. And there were also comments in which multiple goals were mixed.

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[18] The word *libsi* has been created by joining the words *liberális* (liberal) and *bibsi* (kike).

*For financial gain*

The first type included content claiming that Jews have spread and/or created the corona-virus for financial gain, in line with the most common stereotypes. For example, 'the Covid-19 disease was spread by Jews – moreover, it was inflated by them into a pandemic for financial gain' (Kuruc.info, 2020n) or 'I see these Hebrews are doing fine. They made a coronavirus, raking in more than $100,000 billion' (Kuruc.info, 2020e). Bill Gates often appears in this type of content, and is portrayed as a Jew without exception. For example, one of the commenters addressed him by writing, 'You funded the creation of the virus; you also patented it so that no one but you could produce a vaccine' (Index.hu, 2020). Another interesting example was when the accusation was connected to Holocaust denial: 'Zionist Jewish vermin invented this coronavirus! It's a lie, like the Holocaust; it had to be made up in order not only to cause a cri-sis deliberately but also to collect the remaining money of common people. No coronavirus exists or existed' (Kuruc.info, 2020o).

*For world domination, creating a New World Order*

One of the foundations of antisemitic conspiracy theories is the assumption that Jews are striving for world domination. One of the comments claimed that 'the majority of those infected are Europeans and Americans, which EXACTLY CORRESPONDS to the direction of the #Freemasonary, #Jewish_Banking_Monetary_World_ELITE' (Vadhajtások.hu, 2020c). In this type of content, not only does the image of the Jew ruling over the world appear, but also over the Hungarians: 'All of them are shitty Jews enjoying power over the Hungarians' (Kuruc.info, 2020a). There were also cases when belonging to this type was not indicated by explicit content but only by implicit reference. For example, when COVID-19 was described as the 'Illuminati plan' (Kuruc.info, 2020h). Finally, in an interesting comment, it was argued that the Chinese had thwarted the plans of the Jews for world domination: 'Today, Jewish world domination aspirations are over! They are trying to settle migrants in Europe. They are trying with SARS-Cov-2 to stay in power, but they failed because China quickly fought off the biological weapon attack. It has experience because the US already used biological weapons in the Korean War!' (Panyi, 2020).

*To overcome or destroy their enemies*

In this group, there are texts in which commenters claim that Jews want to overcome or destroy their enemies using the coronavirus. These enemies may be ideological ones but are also economic opponents and competitors. For example, in a short comment one commenter wrote: 'The new reality: Jewish laws, vaccine, chip, a global government. You have to get used to it' (Kuruc.info, 2020i). Other examples include: 'Wuhan was an act of war on the part of Israel against China using the double agent Dr. Charles Lieber (who is Jewish and therefore particularly sensitive to Zionist influence if he is not currently under their control)' (Kuruc.info, 2020d) and 'interestingly, epidemic centers have developed in countries that stepped up against the USA, and the emerging money-cartel and world government' (Vadhajtások.hu, 2020b). In another comment, the prelude to COVID is described: 'In the past, the Jews wanted to bomb Iran's nuclear power plants, but the Yankees did not allow them!' (nlc.hu, 2020).

*Coronavirus as Jews' revenge on non-Jews*

Finally, we found only a few examples in which the coronavirus was portrayed as the Jews' revenge on non-Jews. In one of them, Jews were portrayed as a 'destructive power, the people of vengeance' (Kuruc.info, 2020c).

## 5. Conclusion

In our research, we examined a text corpus of articles and comments/posts from the Hungarian online sphere published between December 1, 2019, and July 10, 2020. These two types of content represented two different layers of communication: a professionalized and a lay channel.

Conspiracy theories have been part of religious anti-Judaism and antisemitism throughout the ages. Some of these conspiracy theories accused Jews of spreading disease. Initially, the Jews' supposed aim was a secret plot against Christianity and Christian society. Later, in the modern era, it was to gain control over the world and create a New World Order. Nazi ideology also built heavily on this set of stereotypes but added a new element by portraying the Jews themselves as rats or parasites.

Almost from the very beginning of the coronavirus outbreak, conspiracy fantasies connecting Jews to the pandemic appeared on the internet. These conspiracies were essentially based on previously known tropes. Our results show that these conspiracies were very quickly taken up in Hungary. However, it is important to stress that they appeared only and exclusively in the lay public; namely, in comments and posts. In the period under study, there was practically no trace of them in the editorial media, no matter how far-right.

This result also meant that it was certainly useful to distinguish between these two layers of communication. Moreover, we found that even 'ordinary' antisemitism was less prevalent in articles than expected based on our previous research (Barna & Knap, 2019). This means that when we used as search terms any words used to designate the virus in addition to the word 'Jew/s,' the proportion of antisemitic content decreased significantly. We hypothesize that although on the lay level these coronavirus-related antisemitic conspiracy theories had already begun to spread, they were not (yet) part of the manifest climate of opinion reflected in the media. However, we will only be able to test this hypothesis in the future. The study of coronavirus-related antisemitism offers an exceptional opportunity to examine such diffusion processes, as the onset of the pandemic is known, and thus we have a zero point.

Based on our own results and complemented by international examples, we have created a typology that is suitable for future research on this topic. In our typology we distinguished different types of roles and aims.

In the case of the coronavirus-related antisemitism, Jews appeared in three main roles. Two of these are quite clear. One is that Jews are the creators of the virus, or at least they participated in its development. The other is that they are the spreaders of the virus. In our corpus, we found numerous examples of both. However, the third role is less common: it portrays Jews as the victims – but not, of course, as victims for whom one should feel sorry. This type was often associated with Holocaust promotion, meaning that the coronavirus is portrayed as an instrument for finally completing the Holocaust. In terms of goals, the content was not always clear. However, when it was, those goals known from history reemerged: material gain, world domination, and the destruction of enemies.

In our research we analyzed the communications of a few months after the outbreak. Further research may clarify whether the identified antisemitic conspiracy fantasies persisted over time in posts and comments, and moreover, whether they appeared in articles.

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Anna Vancsó & Zoltán Kmetty

# Dominant Christian narratives of solidarity during the COVID pandemic in Hungary

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**Abstract**

In crises, the importance of solidarity becomes crucial. Religious organizations, as members of civil society, have an essential role in promoting and participating in solidarity action. Dominant religious organizations thus can have the power to shape the image of solidarity in a crisis and, by creating a dominant narrative, to strengthen their social position. In times of crisis, hidden religious narratives could gain visibility, and religious authority could also gain more power. But in the previous migration crisis, religious actors failed to fulfill their solidarity role actively, and were unable to strengthen their public position in Hungary.

We used both quantitative and qualitative text analysis methods to understand the role of religious actors in solidarity action during the COVID-19 pandemic. We have blended these methods with network analysis techniques to present the role of different actors in this communication process.

Our results show that the appearance of religious or church-related actors does not infer a religious interpretation, per se. Many articles mentioned church-related organizations as good examples of solidarity, but this was not embedded into the religious narrative. Religious actors mentioned together with political actors were more visible in online media, but the lack of the former's own voice also shows the decreasing power of religious authority. However, we found religious narratives that called for new understanding and interpretations of the pandemic and its effect on society and the future, but those interpretations were represented mainly by Pope Francis, and echoed by only a few Hungarian actors, showing the lack of dominant and politically independent religious narratives about social issues in the media or the public sphere.

**Keywords:** COVID-19, religion, solidarity, authority, text-mining

## 1. Introduction

In 2020, the topic of the COVID-19 pandemic dominated media all around the world. The interpretation of the crisis framed its perception; meanwhile, the pandemic impacted the everyday lives of people. News related to COVID-19 covered several aspects of the crisis: health, well-being, the economic situation, and the social and psychological consequences of

the pandemic. One of the positive effects of the pandemic seems to have been the strengthening of solidarity among people (Voicu et al., 2020). This topic has intensively been studied in the last few decades from crisis to crisis (Delanty, 2008; Habermas, 2013; Verhaegen, 2018; Gerhards et al., 2019; Wallaschek, 2019; 2020). Wallaschek (2019) says that studying solidarity requires crises. But solidarity is a broad concept, and different types of solidarity narratives exist. It is an exciting research question how the COVID-19 pandemic has shaped these solidarity narratives and the dominant narratives of social actors.

In times of crisis, the call for solidarity becomes extremely loud. The voice of religious organizations is supposed to be significant or even dominant in such times, since, in religious teachings, solidarity is a basic moral principle, and religious communities are built on solidarity. Research shows that the presence of religion in the public sphere is strengthening (Casanova, 2007; 2011; Berger, 1999; Butler et al., 2011; Hjelm, 2015). However, this visibility involves a rather secular (cultural, historical, social) interpretation of religion instead of the presence of the teachings or 'unique' narratives of religious organizations. (Berger, 1999; Taylor, 2009). Thus, in times of crisis, when religious actors become more visible in the public sphere, researchers have a chance to get a clearer view of their position in society. We can map their relation to power and their embeddedness in the power structure by analyzing their publicly available discourses (Fairclough, 1989; Van Dijk, 2008; Wodak, 2012; Hjelm, 2014; McHoul et al., 2015). Previous research has already shown that, in Hungary, religious actors – churches and church-related civil actors – have a weak, but independent, and accessible voice in the online public sphere during times of crisis (Vancsó, 2020a; 2020b). Their role in fundamental caring functions is constantly growing within the country. This (at first sight contradictory) phenomenon can be explained by the growing secular role of religion, which affects a huge part of society. At the same time, faith-based religious narratives about the crisis are still hidden in a marginal part of the public sphere.

## 2. Previous studies

Although the worldwide COVID-19 pandemic only started in early 2020, several papers have already been published on the topic of the news representation of the pandemic. Most papers have tried to map the effect of the pandemic on everyday life (Yin et al., 2020; Gonzalez-Tortolero, 2020). Semetko (2000) and his colleagues took one step back and tried to define the mainframes of media representation in this regard. They identified five main, always present frames: conflict, human interest, economic consequence, morality, and responsibility. Ogbodo (Ogbodo et al., 2020) narrowed their research to the COVID-19 pandemic and tried to map the leading global media frames of the pandemic. Their results showed that, globally, the core frames of the crisis are the human and/or social consequences of the crisis and the emotion of fear; the frame of hope also appeared. In their paper, they also presented the role of religious interpretations within this global media framing; results showed that religious actors used morality as an additional layer.

We followed this research stream and analyzed the central narratives of solidarity discourse which appeared in both morality and responsibility frames used by religious actors in Hungary during the COVID-19 pandemic. We used the word 'narrative' since our primary aim was to capture uniquely Christian interpretations embedded in the broad framework of discourses on solidarity, which is mainly dominated by political interpretations in online media, but we also sought to refer to/look for the wide range of solidarity narratives that are part of Christian teaching. We used both quantitative and qualitative text analysis methods to

understand the role of religious actors in solidarity action and the representation of solidarity during the COVID-19 pandemic. We mixed these methods with network analysis techniques to test the role of different actors in this communication process.

Based on previous research that showed that religious discourses and narratives are reflective and firmly embedded in actual political narratives (Vidra, 2017; Vancsó, 2020a; 2020b), we assumed that we would find similar patterns during the COVID-19-related crisis. We were also interested in revealing the relationship of religious institutions to the political sphere by looking at the shared narratives of actors with a high level of authority, or the co-appearances of actors from different spheres in selected media articles in the discourse on solidarity. The lack of a unique narrative could be due to the lack of religious authority – a question we investigate more deeply by analyzing power relations between religious and political authority.

## 3. Solidarity and the question of religious authority in times of crisis

Solidarity is defined as a situation in which the well-being of one person or group is positively related to that of others (Koster & De Beer, 2009, p. 12); as such, it is an indispensable element of everyday life. In crises, its importance became crucial (Grajczár et al., 2019). Research on solidarity became central after 9/11 and after the economic crisis in 2008, showing that in the case of any form of existential threat, solidarity strengthens (Collins, 2004); it has gained even more significance since 2015 due to the so-called refugee crisis in Europe (Della Porta, 2018; Wallaschek, 2019; Bernát et al., 2019). The COVID-19 situation brought questions about solidarity and related activities in civil society to the fore again (Carlsen et al., 2020, Brechenmacher et al., 2020). Research shows that, since the beginning of the pandemic in Hungary, positive attitudes toward solidarity have been growing (Voicu et al., 2020), and the mobilization of people in the name of solidarity has been quite successful. Civil society had a significant role in distributing support and help in this period. However, it is also known that this sort of temporary solidarity can fade away without face-to-face interaction. (Collins, 2004) Religious organizations, as members of civil society, can have a crucial role in promoting and actively participating in solidarity action on a religious basis since most religious teachings stress the importance of solidarity as a moral principle. Solidarity derives from the feeling of belonging, or 'feeling of membership' (Collins, 2004, p. 49), a crucial factor in religious organizations. Solidarity can empower social movements (Draper, 2014), including religious-based action. Thus, religious organizations may be dominant representatives and actors of solidarity by setting an example in their everyday routines and communicating it.

Dominant religious organizations thus can have the power to shape the image of solidarity in a crisis and, by creating a dominant narrative, strengthen their social position. In times of crisis, hidden religious narratives could gain visibility, and religious authority could also strengthen. Religious authority derives from power over the means of salvation and is legitimated and maintained by a unique language of the supernatural (Chaves, 1994, p. 756); thus, religious actors can use an independent and unique religious narrative to designate the 'territory' of their authority as well. Online media gives space for new actors' claims of religious authority (Campbell, 2007; Turner, 2007). Therefore, traditional religious actors should step into this sphere to maintain and reinforce their authority. Besides their online presence, a unique symbolic language, style, and alternative narratives can distinguish their role from that of other civil actors that actively communicate and act in solidarity. In our investigation, besides the description of the dominant religious narratives, we also seek to understand the

position of religious institutions and religious authority in the public sphere through the lens of online media.

## 4. Data and methods

To map the main religious narratives of solidarity during the COVID pandemic, we analyzed how religious actors[1] actively or passively communicated in the online space. We focused on Christian actors and organizations both due to their dominance in the country and their strengthening role in the public sphere. We used the Sentione[2] social media platform to collect our initial corpus. Sentione collects articles, posts, and comments from more than one million Hungarian websites, including Facebook groups that are not private. In the first step, we collected 'all' the available content from religious actors between 2020.01.01 and 2020.08.31. We searched only for Hungarian-language content. For the query, we created a list of websites and Facebook groups that included the official sites of churches (evangelikus.hu) and orders (jezsuita.hu), and also religious newspapers (ujember.hu). We also defined a set of keywords to collect all relevant content in which religious actors are mentioned. These keywords included the names of churches and key religious persons. Only Hungarian key persons were listed, with one exception: Pope Francis. We wanted to include him to create a frame whereby Hungarian and international discourse on solidarity could be compared. With the above-described query, we collected the content of 38,471 articles and posts. The list of sites and the list of keywords is available in the appendix.

Before applying any text-mining methods, we had to pre-process the texts (Ignatow & Mihalcea, 2016). We removed all the special characters from the texts along with the HTML tags, and transformed emojis into character strings. We used DBpedia (Lehmann et al., 2015) for Named Entity Recognition (NER) and magyarlanc (Zsibrita et al., 2013) for the lemmatization of the texts. After lemmatization, we searched for significant bigrams and trigrams in the texts. We tried to identify the negations in the texts and concatenate them into one token, and if we could specify the opposite meaning of the words (mainly adjectives), we also transformed the tokens into the opposite word (e.g. not nice → not_nice → ugly). Some duplications of articles and posts from the same sites occurred in our corpus – some sites have content optimized for mobile browsers. In this case, they upload the same article with different links. We only kept one version of these articles. It is also common for sites to update the same article with new information. In this case, we kept the newest version of the article. After duplication filtering and pre-processing, we had 30,211 articles and posts. In our analysis, we focus on solidarity-related action and discourse related to the Covid situation. As our initial corpus was broad, we had to narrow it down. We used keywords to map Covid- and

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1    As can be seen in the list of religious actors, we focused on Christian organizations and their representatives. They were not differentiated in the data collection process, but there were slight differences concerning the dominant narrative they represented.

2    SentiOne (www.sentione.hu) is an international social listening piece of software; a content-based web analytics platform that covers and recognizes 30 languages from across Europe. It gathers, indexes and analyses public online content published anywhere on the web, starting with social media channels through blogs, forums and websites. The interactive platform is built upon user-provided keywords and key phrases and looks for specific mentions that either in themselves or within their context contain the phrases that interest the user. The system gathers data almost in real-time, yet has a historical database that goes back 3.5 years. For quantitative research, data is structured according to different focal points and research parameters and can be visualized on an interactive dashboard. This form of technology also supports deep qualitative analysis as it enables thorough analysis and categorization of all indexed web content such as articles, posts, comments, etc., one by one.

solidarity-related content. The list of keywords is available in the appendix. We only kept those articles in which any of the selected keywords appeared. After keyword filtering, 5,015 articles and posts remained in the corpus.

For the descriptive analysis of the texts, we applied Latent Dirichlet Allocation (LDA) topic modeling (Blei et al., 2003). LDA is a standard method of text mining for identifying the main topics within a corpus. It works like fuzzy cluster analysis, so it defines a probability for each document regarding how likely it is that document $i$ contains topic $j$. There is no standard way to determine the topic numbers. We followed a complex strategy here. First, we ran two models with nine topics each, and merged the results of the models, so we had 9×9 topics in theory, but some of them were empty, and only a few contained an analyzable amount of articles. We extracted those nine topics where the minimum number of articles was 90. We checked for the most common and most often featured words in relation to these topics, and we also read some of the articles on every topic. After this qualitative step, we decided to omit some topics and merged some of them when content was quite similar. We used a fast-text-based classifier (Joulin et al., 2016) to finalize the topic classification. At the end of this process, we had 855 articles classified into four topics. This content is the core communication of the religious actors in the online media related to solidarity during the pandemic.

Using a mix of quantitative topic modeling and qualitative content analysis, we were able to identify the primary communication frames of religious actors related to solidarity during the COVID-19 pandemic.

Besides mapping the main solidarity discourses, we also wanted to identify the network of religious and other actors within this online discourse. We searched for names and institutions with a minimum of five appearances in the corpus. We identified 14 institutions, 64 religion-related people, 11 politicians, and three businesspersons. In the appendix we give a short description of the actors we found. We drew the networks of these actors based on their co-occurrence within the articles. We applied a threshold of three common articles to form a tie between two actors, and drew unique networks for each topic. We used the R igraph package (Csardi & Nepusz 2006) for the network visualization.[3]

After an initial analysis of the final corpus, we found that some articles appeared in the same form in different outlets. This was typical in some county outlets which are under the control of the Central Media Press and Media Foundation[4] (Hungarian abbreviation: KESMA). These outlets released the same article at the same time, without any difference. Keeping these duplicates would have increased the tie strength of those actors who appeared together in these articles, thus we decided to keep only one of the articles in such cases when we calculated the actor network.

We used quantitative topic modeling to identify the main frames of the online media content concerning the discourses on solidarity and religious organizations, but we wanted to take a further step to better understand the narratives behind those topics. With qualitative content analysis, we defined four main narratives behind the different types of solidarity: economic crisis narrative, humanitarian/social crisis narrative, responsibility narrative, and religious reformation narrative.

The economic-crisis narrative calls for solidarity due to the economic consequences of the COVID-19 crisis. The tragic effect of the crisis on people's livelihoods calls for action in this

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3    We extracted four topics from 855 articles. We calculated separate networks for all the topics, but we did not obtain a coherent graph for the two smaller topics, so we decided to present the networks for the two bigger topics in this paper. See details later.

4    https://en.wikipedia.org/wiki/Central_European_Press_and_Media_Foundation

field on a national and local level. The narrative of the economic crisis is strongly connected to the need for instrumental support.

The humanitarian/social crisis narrative is a more general and global narrative that highlights the effects of the pandemic on humanity, including all related aspects: social, economic, and even political. Due to its international context, this narrative does not call for direct action; it is instead about the ideals of solidarity.

The responsibility narrative enhances the importance of all actors – political, other institutional, and individual – in terms of shouldering responsibility for the safety of others by deciding to act based on the idea of solidarity. It also operates on a more global level, but it does not stress crisis nor their handling, but rather the prevention of a deeper crisis by showing everyone's responsibility.

The religious reformation narrative deals with the challenges religious organizations must face concerning the changing circumstances of their everyday operations and performance of religious practice. Religious community is the key to maintaining religious institutions. The lack of physical presence can severely affect religious institutions if they do not reform their activities. This narrative is quite broad, appearing on both the individual level in the form of advice to practice religion at home, and on a macro and global level in relation to discussions about the advantages and disadvantages of the changes.

Since our investigation focused on understanding the position and authority of churches, following Bawidamann's research (Bawidamann et al., 2020), we identify three types of authority: governmental, professional, and religious.

Governmental authority is represented in legislation and regulations created by the government due to the pandemic; professional authority appears in the statements and suggestions of scientific and medical professionals concerning the crisis. Religious authority is present in statements related to explaining changing religious practices and other religious interpretations of the crisis and its lessons. Authorities are firmly connected, interfere, and may clash in various situations and are interrelated with the narratives they create or are embedded in. Thus, authority can create several narratives in parallel. A narrative can belong to different actors, but the position and legitimacy of the actors define the effectiveness and public dominance of the narratives they communicate.

## 5. Results

### 5.1 Topics

Solidarity is not a one-dimensional concept; it has several forms. Solidarity can be immediate and target those in actual need, but it can also refer to more generic solidarity towards humanity. Applying topic modeling, we identified four separate ways (see Table 1) in which different interpretations of solidarity were present. The topics cover different narratives of solidarity, but some forms of solidarity appeared within multiple topics as well Table 1).

The first two topics are organized around instrumental support – providing **monetary** support in the form of donations and providing somewhat '**tangible**,' *concrete* support in the form of food distribution, shopping, or the donation of electronic devices to children for use at home. The topic of tangible assets appeared more in religious outlets, while monetary-support-related articles were more commonly released in 'standard' media outlets. With regard to the latter topics, the number of articles released by KESMA was high, which is a mark of political presence (we will come back to this later).

Table 1. *Basic statistics about extracted topics and dominant narratives in topics*

| Topic | Number of articles | Number of articles without county KESMA outlets | Percentage of articles released in religious outlets | Mean number of comments | Dominant narratives |
|---|---|---|---|---|---|
| Instrumental support - tangible | 95 | 88 | 45,3% | 0,36 | Economic crisis |
| Instrumental support - money | 275 | 209 | 11,3% | 1,6 | Economic crisis and humanitarian |
| Everyday religious life | 100 | 90 | 37,0% | 2,6 | Responsibility |
| Global Christian perspective | 385 | 366 | 32,2% | 1,21 | Humanitarian Religious reformation Economic crisis |

The third topic was about the **changing religious life**, with a focus on the logistics and operations of religious organizations regarding adapting to the new situation. This topic was the most commented on in this corpus.

The fourth topic was quite a large one, with numerous articles covering the speeches and statements of Pope Francis who talked to the whole religious community (even though he is Catholic, he often refers to humanity in his statements), referring to Biblical examples and the social teaching of Christianity as the basis for action. Thus the topic is called the **global Catholic perspective**.

### 5.2 Instrumental support

The Hungarian Interchurch Aid asks for donations due to the economic and social effect of the COVID-19 pandemic which affects all. HIA asks that people, beside their own problems, do not forget people who are already in need, and who are even more severely affected by the consequences of the situation. (KESMA newspapers, 2020, March 18)

Instrumental support refers to action – preexisting or provisional – through which people help each other in several ways by providing some form of material support. We identified two topics related to instrumental support – monetary and tangible support – as acts of solidarity. They both used the economic crisis as the main narrative. Still, while political actors besides the church-related civil actors were influential with regard to the donation-focused topic, we did not find the same pattern in terms of tangible support. Monetary support focused on the collection and distribution of help by enhancing actors, while tangible support concerned the recipients of various forms of support, such as free meals, seeds, or technical devices for children. In the case of the first type, actors (donors) are necessary. In the second, the focus is more on the support itself and the target group.

### 5.2.1 An economic and social crisis narrative

Articles in the category of instrumental support call attention to the tragic economic consequences of the pandemic. This is the central narrative of this topic. The social crisis is approached from an economic point of view. The focus is on the financial consequences of the pandemic and not on health-related issues. It is a pragmatic narrative focused on action instead of description, which appears on a local level.

Articles contain information about fundraising activities, thus also presenting actors that are already active as good examples. These actors are mainly church-related civil organizations and are thus strongly connected to churches. But the central narrative of these statements and calls are non-religious. The number of religious references (references to religious teaching or important religious actors) is almost zero. Despite this, however, the actors are religious; yet they appear with their social activities without mentioning any religious aspects. The only signs of religion here are the organizations' names, which show their relation to a church. Religious actors passively concede the creation of this narrative. They are the representations of instrumental support that are responding to the crisis, yet they are not the ones that show off their activities or make statements by calling attention to the crisis.

*5.2.2 Actors: Governmental and religious authority*

The main actors in such articles are church-related civil organizations – Catholic Caritas, Hungarian Interchurch Aid, Hungarian Charity Service of the Order of Malta, and some political actors and organizations. While civil organizations are presented without mentioning any actual names of representatives – one exception is Márton Juhász, the managing director of Református Szeretetszolgálat – political actors are strongly represented. Civil organizations are mentioned as active participants in providing support – the intermediary between donors and people in need – and as those who are calling for attention to the crisis and the urgent need for support. Political actors call attention to the importance and usefulness of religious organizations and churches at a time of crisis, but from a well-defined power perspective.

An interesting result is a clear difference between the monetary and the tangible form of support in the case of actors. Actors in articles related to tangible support are typically churches and church-related civil organizations. In contrast, content concerning tangible donations frequently mentioned governmental institutions and personnel connected to those organizations. Another difference is denominational. In the case of monetary support, the Hungarian Reformed Church and its civil organization are overrepresented. Concerning tangible support, the Hungarian Catholic Church, Catholic Caritas, and the Hungarian Catholic Bishops' Conference are the main actors.

The National Humanitarian Coordination Council (NHCC) was the most – and almost only –institution that was related to a political actor. The most commonly mentioned non-institutional actors are politicians; Miklós Soltész, a politician who is currently the secretary of the State Secretariat for Ecclesiastical and Ethnic Relations (SSEER); Máriusz Révész, a *government commissioner* for active leisure activities, and Herczegh Anita – wife of János Áder, the President of Hungary, who was actively involved in charitable activity.

To understand the relation of these actors in the monetary support sub-narrative, we used a network approach in which the actors were connected if they were co-mentioned in the same article. This network shows the strong interconnection between the political and the church-related civil institutional actors. We identified 29 actors in relation to the monetary support topic. The graph density was 0.19, and the average path between the actors was 1.51. The network measures also confirm the central position of institutions. The betweenness value of institutions was 17.3, and the same value for the politicians was 5.3, while for religious persons it was only 3.8. (Fig. 1.)

Meanwhile, neither the number of actors nor the strength of the relations between them was significant enough to draw a similar network concerning the tangible support narrative. In looking at the actors, the absolute lack of religious representatives is evident, which besides the narrative also supports the non-religious nature of this perspective. Comparison of the
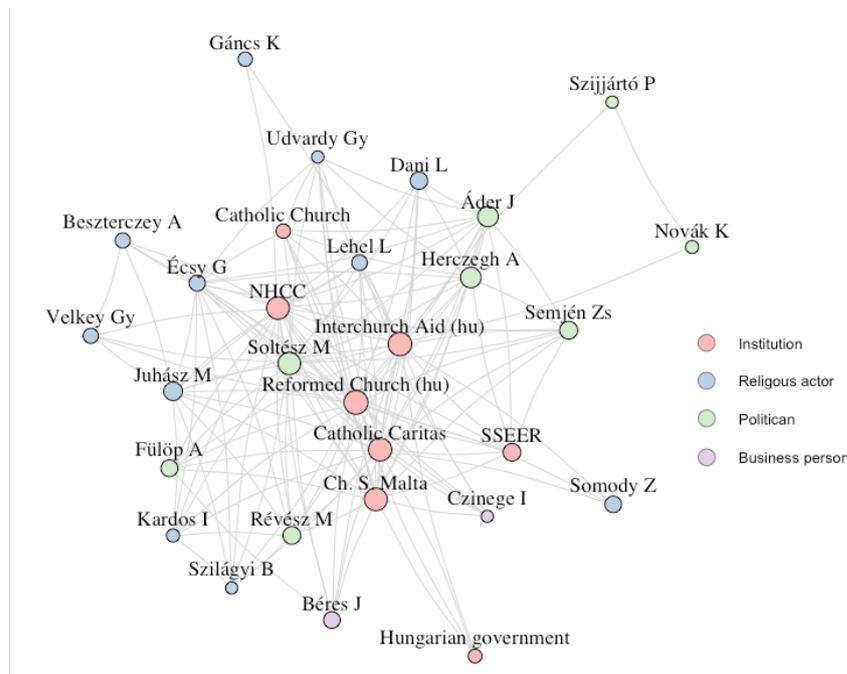
Figure 1: *Network of actors in the monetary support topic*

presence of other non-church-related civil organizations would be interesting (by focusing on the involvement of political actors as regards the interpretation of their activities). Still, we suppose that from this point of view, they are less visible.

### 5.3 Everyday religious life

Articles on this topic inform believers and active members of religious communities about the changing forms of religious practice in pandemic times. Besides the useful information, some advice is also communicated to believers about how to continue their religious activities at home or follow the online activity of the churches – including the Evangelical, the Reformed, the Catholic, and smaller churches as well.

#### 5.3.1 Responsibility and the religious reformation narrative

Behind this topic we found a narrative about solidarity that referred to the responsibility the churches must shoulder to protect their communities and the responsibility of people to protect each other. This narrative became significant due to the Easter period when suggestions and practical information had to be shared with believers concerning celebrating at home, without community and religious guidance. Due to the changes in religious practice, the religious reformation narrative also appeared, although it was less significant.

#### 5.3.2 Actors: Religious authority

Actors were associated with the most prominent churches in Hungary. Institutions such as the Hungarian Catholic Church and the Hungarian Catholic Bishops' Conference were overrepresented. The Hungarian Evangelical Church and the Hungarian Reformed Church were also relevant actors here. Regarding religious representatives, Péter Erdő and Tamás

Fabiny were the most active persons. Interestingly, representatives of the Reformed Church are rarely mentioned in any of these articles.

The question of responsibility in relation to the topic was interpreted in a religious context, since churches had to redefine religious regulations during the pandemic. Religious actors within normal circumstances define regulations about Sunday Masses or Eucharist, but these were overwritten by state regulations during the pandemic, thereby questioning the importance of religious authority. This also meant that the power that religious authority possessed based on access to Divinity was weakened as believers could not practice their usual religious rituals. Concerning the opposition between religious and governmental regulations, there was a potential clash between the two authorities. While religious events require face-to-face presence, governmental regulations forbade these events. Religious actors agreed with the state regulations, but, due to the autonomy of the Churches, they could have acted differently. The narrative of responsibility explained the decisions made by religious authorities in this matter; the safety and wellbeing of the community and human life were superior to any regulations. Interestingly, professional (medical) actors did not appear in relation to this topic. This means that, in this discourse, political authority was much more important than professional authority.

The role of responsibility and solidarity in religious teachings (mainly Biblical) and religious identity substantially impacted the acceptance of such changes among members of religious communities. At the same time, as Collins claims (Collins, 2004), a lack of presence also can transform solidarity. Interactions are essential for maintaining group solidarity. Solidarity can help with keeping to regulations, but following them for a more extended period can weaken solidarity due to the lack of belonging, which may severely negatively affect religious communities.

### 5.4 General religious perspective

'The early Church is depicted as "a field hospital that takes in the weakest people: the infirm."'

Most of the articles on this topic present the thoughts of Pope Francis concerning the COVID-19 pandemic. The topic does not refer to a global 'Christian opinion' concerning the effects of the pandemic; instead, it mainly covers the view of Pope Francis and some other Hungarian representatives of the Catholic Church and religious orders, thus addresses their opinions on the global scale. The image of Pope Francis is characterized by humanitarianism. He is the first non-European Pope, which puts him and his position in a unique context. Humanitarian characteristics are represented in his statements concerning COVID-19 as well. He not only addresses religious people, but the whole of humankind, promoting dialogue and cooperation among different religions for the sake of humanity by enhancing the social teaching of Christianity. His main message: people in need – those in poverty, the sick, the elderly – should be the focus of care. These articles are filled with Biblical parables, and references to Biblical and other Christian figures associated with the history of Christianity. The style of the articles differs from those in other topics; it is symbolic, lacking reference to the pragmatic and practical aspects of the pandemic and its effects that characterizes the other topics.

#### 5.4.1 The humanitarian crisis and religious reformation narratives

The humanitarian narrative embeds economic and social crisis and responsibility narratives in a global and, more importantly, a theoretical and theological context.

'This pandemic shows that there are no differences and boundaries to suffering – we are all fragile and equally valuable.'

It deals with ideas such as equality and fraternity from a religious angle, showing a different face of the pandemic and its possible short- and long-term effects, worldwide. It has a positive image of the future – when equality is strongly present, and people are valued based on their action embedded in solidarity toward each other. It is also humanitarian in the sense that it is linked with other humanitarian issues such as the effects of migration or ongoing wars. In this way, it is also connected to political decision-making processes. The previous narratives focused on immediate action in the name of solidarity concerning the crisis; this narrative brings religious (theological) reasoning and questions to the table to help understanding the situation. The humanitarian narrative is religious because it calls for action in the 'right' order, starting with helping the sick, the poor, and people in need.

Articles on this topic also contain narratives about the reform of religious practice by focusing on the future of the Church after the pandemic. The narrative of Pope Francis on this matter touches upon religious identity – similarly to statements concerning the migration crisis and its effect on Christianity. However, in the Hungarian context the religious reformation narrative is rather about formal changes in everyday activities and does not deal with effects, despite the statements of Gergely Kovács, a bishop whose interpretation about the changing circumstances of the pilgrimage to Csíksomlyó was highly positive concerning the redefinition of religious identity and the return to faith. The religious reformation narrative is theological, with a special focus on solidarity; it involves a positive image about the future of faith due to playing down the material aspects of life.

### 5.4.2 Actors: Religious and political authority

Pope Francis was so dominant with regard to this topic that he was mentioned in almost all the articles (385). Only a few Hungarian actors were involved (see Figure 2), such as Péter Erdő and Csaba Böjte, a well-known Franciscan monk and public figure in Hungary who shared Pope Francis' opinion about the importance of a religious approach to the crisis. Another dominant actor was Gergely Kovács, the bishop of Gyulafehérvár in Transylvania, already mentioned above (Fig. 2.).

The network measures also confirmed Pope Francis's dominance of the topic. The betweenness value of Pope Francis was 64, while the second-highest value was 13.5. This graph was less dense than for the instrumental support network; the density value was 0.13 here, and the average path length was 1.6 between the actors. We identified nearly twice as many articles here than for the instrumental topic, but we identified fewer actors and fewer ties.

Pope Francis is a globally legitimate actor in terms of dealing with social, economic, and political questions from a religious point of view. His statements such as "Let's hope for a united Europe!" or his praying for researchers and political leaders to make the right decision – but not attempting to tell them what the right decision is – shows that religious authority has the legitimacy to expound open opinions about non-religious questions without directly interfering with political authority. Legitimate religious opinions are possible, alongside political ones. Moreover, most of the statements are embedded in his preaching. Therefore, he not only touches upon global social issues, but does it in a religious context.

Meanwhile, in the Hungarian context, religious actors are not part of discussions about social issues. There is almost no religious narrative – besides that which relates to practical issues – concerning the COVID-19 pandemic. The lack of dominant religious actors in the media concerning non-religious issues is – we suppose – not due to the lack of those narra-
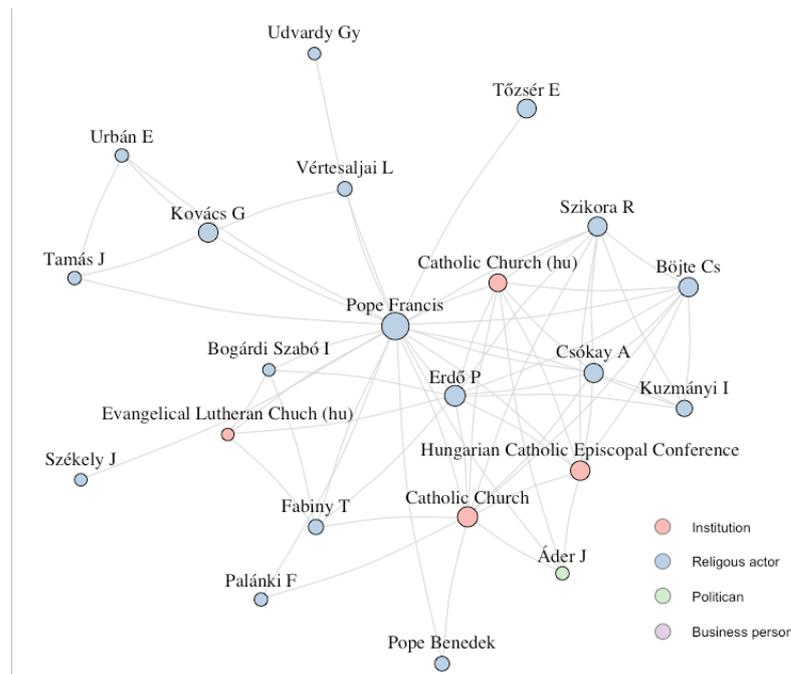
Figure 2: *Network of actors in the General religious perspective topic*

tives, but the inability or the lack of willingness to communicate such thoughts in the public sphere (Vancsó, 2020b). It also shows their lack of authority to discuss these problems in the public sphere.

## 6. Discussion

Our study has some limitations. First of all, we analyzed discourse in the online space based on selected articles and posts. We did not include other channels like television broadcasts, or email lists, or Facebook groups. We do not think we missed essential narratives, but the strength of selected narratives could be different on other platforms. It was also challenging to find the boundaries of the discourse. It is far from straightforward to classify which articles are about solidarity and which are not. We applied a two-step approach. First, we filtered the content using solidarity-related keywords; then we ran a topic model to identify relevant and irrelevant content. Due to this step, we kept less than 20 percent of the articles. This selection process is also linked to geographical boundaries. We decided to include articles about Pope Francis and solidarity. But we also had to deal with reports about Slovakia and Romania, where local but Hungarian-speaking actors were present in media outlets. In the topic modeling phase, we omitted much content that did not substantially affect the Hungarian situation.

Previous research (Ogbodo 2020) on the media framing of the COVID-19 crisis showed that the related negative social and economic consequences and fear of the pandemic dominated people's narratives and everyday opinions. Solidarity played a crucial role in handling the crisis. Solidarity is of vital importance in the daily operation of churches and church-related civil organizations; however, the religious roots of solidarity are barely visible in online media. Religious websites share much operational information but are less theological. Theological matters have to remain within their communities. In this situation, when physical presence

and face-to-face discussions are prohibited, the strength normally derived from community can weaken, significantly affecting solidarity.

Our actor-based research findings show that the appearance of religious or church-related actors – individuals or organizations – does not imply a religious interpretation, per se. Many articles focused on donations, and other material forms of solidarity included mention of church-related organizations as good examples, or as the 'executors' of this form of solidarity without creating a specific, religious narrative. These religious actors are instrumental elements of the organized solidarity actions, and participants in the chain of responsibilities in which governmental actors also participate and sometimes dominate. Instead of religious or church-related actors, political actors called attention to the work of such organizations.

Professional actors were missing from the religious narratives on solidarity. One of the few professional actors who was mentioned was András Csókay, a famous neurosurgeon who was mentioned in a religious context as a patron of an event (an ongoing mass at noon, organized by the editors of online Catholic websites). When religious authorities decided on keeping to the governmental regulations, references to professional narratives were not presented.

However, religious narratives called for new understanding and interpretations of the pandemic and its effect on society and the future. But these interpretations were represented mainly by Pope Francis, and reflected by only a few Hungarian actors, showing the lack of dominant and politically independent religious discourses on social issues in the media or in the public sphere. In our database, most of the articles were from religious sites, although content was hosted on non-religious sites in many cases.

This passive communication by religious actors was also observed during the migration crisis (Vancsó, 2020b). Religious actors mentioned by or together with political actors are more visible in the media and the public sphere; thus, their work is mostly seen through a political lens. The withdrawal of religious actors and religious discourses from the public sphere gives space to any public actors to 'appropriate' the style and symbols of the former, since no one is fighting for them. Today, religious authority has less and less legitimacy to participate in any discussion that is not directly linked to it. The causes are multiple: from the individualization of religion in society to the mass dissemination of religious narratives from the public sphere by political power, which puts religious actors – mainly on an institutional level – into a rather secular 'social-care' position. Religious belief is a private matter, but religious actors seem to be located between the public and private spheres. Religious actors are expected to take a stand on social issues, but to stay away from interfering in individual decisions.

This may also mean that actors in the public sphere will not be able to reach the non-religious, and in some cases, nor will people with religious belief be able to reach non-religious parts of society, even when they should have something to say.

### Acknowledgement

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**Appendix**

*List of examined sites:*

- magyarkurir.hu
- ujember.hu
- 777.hu
- katolikus.hu
- szemlelek.net
- evangelikus.hu
- reformatus.hu
- vidamvasarnap.hu
- tihanyiapatsag.hu
- premontreiek.hu
- pannonhalmifoapatsag.hu
- jezsuita.hu
- https://www.facebook.com/katolikus.ma
- https://www.facebook.com/katradio
- https://www.facebook.com/groups/466512313366461
- https://www.facebook.com/evangelikus
- https://www.facebook.com/Reformatusok
- https://www.facebook.com/Reflap
- https://www.facebook.com/ahitgyulekezete
- https://www.facebook.com/metodista.hu
- https://www.facebook.com/szemlelekblog
- https://www.facebook.com/magyarkurir
- https://www.facebook.com/ujemberhetilap
- https://www.facebook.com/gorogkatolikus/

*Keywords according to institutions and people*

- Magyar Katolikus Egyház
- Magyar Református Egyház
- Magyar Evangélikus Egyház
- Hit Gyülekezetet
- Magyarországi Evangéliumi Testvérközösség
- Magyar Katolikus Püspöki Konferencia
- Görögkatolikus Metropólia
- Szent Egyed Közösség
- Jezsuita Szeretetszolgálat

- Katolikus Caritas
- Református Szeretetszolgálat
- Evangélikus Szeretetszolgálat
- Ferenc Pápa
- Erdő Péter
- Beer Miklós
- Kiss-Rigó
- Veres András
- Márfi Gyula
- Böjte Csaba
- Hodász András
- Székely János
- Várszegi Asztrik
- Sajgó Szabolcs
- Pál Ferenc
- Fabiny Tamás
- Gáncs Péter
- Szemerei János
- Bogárdi szabó István
- Fekete károly
- Németh Sándor
- Iványi Gábor
- Gyurkovics Miklós
- Khalil Youssef

*Keywords for mapping COVID-19-related content*

- COVID
- coronavirus

*Keywords for mapping solidarity-related content*

- responsibility
- freedom
- cooperation
- support
- help
- aid
- solidarity
- serve

*Key actors identified*

Áder János – President of the Republic
Baán Izsák – Benedictine monk

Balogh Zoltán – Bishop of the Reformed Church, former politician

Bándi Imre – CEO of Caola, businessman

Baranyai Béla – Catholic journalist

Beer Miklós – Catholic Bishop Emeritus

Bencze András – Lutheran pastor

Pope Benedict – Former head of the Catholic Church

Benkó Attila – Hospital chaplain, Catholic priest

Béres József – CEO of Béres Pharmacy, businessman

Bese Gerely – Catholic priest

Beszterczey András – Head of the Diaconal Office of the Reformed Church of Hungary

Bogárdi Szabó István – Bishop of the Reformed Church

Böjte Csaba – Franciscan monk, founder of the Saint Francis of Deva Foundation

Czinege Imre – CEO of Pharmacenter Hungary Kft.

Cserháti Ferenc – Auxiliary Bishop of Esztergom and Budapest

Csókay András – Neurologist, founder of Doing Good Is Good Foundation

Dani Lajos – Executive Vice President of Hungarian Charity Service of the Order of Malta

Écsy Gábor – National Director of Caritas Hungary

Erdő Péter – Roman Catholic Cardinal

Magyarországi Evangélikus Egyház – Evangelical Church of Hungary

Fabiny Tamás – Evangelical Bishop

Fekete Károly – Bishop of Reformed Church

Egyházi és nemzetiségi ügyekért felelős államtitkárság – State Secretariat for Church and Nationality Affairs

Pope Francis – Head of the Catholic Church

Fodor Réka – Missionary doctor

Fülöp Attila – State Secretary for Social Affairs

Gáncs Kristóf – Director of Communications of Hungarian Interchurch Aid

Gável András – Christian musician

Gulyás Attila – Helaer, leader of the "Győzelem Gyülekezet"

Hatházi Róbert – Catholic priest

Herczegh Anita – Goodwill Ambassador of Hungarian Charity Service of the Order of Malta, wife of the president of the Republic (Áder János)

Hit Gyülekezete – Church of faith

Hodász András – Roman Catholic priest

Iványi Gábor – Leader of the Evangelical Fellowship of Hungary

Józsa Judit – Ceramics sculptor

Juhász Márton – Leader of Hungarian Reformed Charity Service

Kardos István – Director General of the Hungarian Red Cross

Katolikus Karitász – Caritas Hungary

Katolikus Egyház – Catholic Church

Kelényi Tibor – Jesuit Priest

Kocsis Fülöp – Greek-Catholic monk, bishop

Kondor Péter – Evangelical Bishop

Kovács Gergely – Catholic priest, Archbishop of Gyulafehérvár

Kozma Imre – Roman Catholic priest, Founder of the Hungarian Charity Service of the Order of Malta's

Kuzmányi István – Permanent deacon and editor-in-chief of the Magyar Kurír

Lehel László – President and CEO of Hungarian Interchurch Aid

Magyarországi Katolikus Egyház – Catholic Church of Hungary

Magyar Kormány – Government of Hungary

Magyar Máltai Szeretetszolgálat – Hungarian Charity Service of the Order of Malta

Magyarországi Református Egyház – Reformed Church of Hungary

Magyar Szocialista Párt – Hungarian Socialist Party

Majnek Antal – Roman Catholic Bishop

Marton Zsolt – Roman Catholic priest, Bishop of Vác

Mohos Gábor – Roman Catholic priest, Auxiliary Bishop of Esztergom and Budapest

Molnár János – Roman Catholic parish priest

Molnár Tamás – Hungarian pastor in Bratislava

Novák Katalin – Hungary's state secretary for family and youth affairs

Orbán Viktor – Prime minister of Hungary

Ökumenikus Segélyszervezet – Hungarian Interchurch Aid

Palánki Ferenc – County bishop of Debrecen-Nyíregyháza

Püspöki Konferencia – Bishops' Conference

Református Szeretetszolgálat – Hungarian Reformed Charity Service

Révész Máriusz – MP, Government Commissioner for Active Hungary

Roos Márton – Retired county bishop of Timisoara

Semjén Zsolt – Deputy Prime Minister

Simicskó István – MP, political group chairman of KDNP

Soltész Miklós – State Secretary for Church and Nationality Relations

Somody Zoltán – Hungarian Red Cross Communications Manager

Spányi Antal – Roman Catholic priest, bishop

Steinbach József – Bishop of the Transdanubian Reformed Diocese of the Reformed Church of Hungary

Stelbaczky Zsuzsanna – Chief Pharmacist

Székely János – Bishop of the Diocese of Szombathely

Szemerei János – Evangelical Bishop

Szijjártó Péter – Minister for Foreign Affairs and Trade

Szikora Róbert – Musician

Szilágyi Béla – President of Hungarian Baptist Aid

Takáts István – Catholic priest

Tamás Huba – Pastor

Tamás József – Hungarian Catholic Bishop in Romania

Ternyák Csaba – Catholic priest, Archbishop of Eger

Tóth Tamás – Secretary of Bishops' Conference

Tőzsér Endre – Priest, journalist of Magyar Kurír

Udvardy György – Hungarian Catholic priest, Bishop of Pécs

Urbán Erik – Franciscan Provincial Superior

Vágvölgyi Gergely – Editor in Chief of Vasarnap.hu

Varga László – Catholic priest, Bishop of the Diocese of Kaposvár

Várszegi Asztrik – Benedictine monk, bishop, archabbot of Pannonhalma

Velkey György – Director General of Bethesda Children's Hospital

Veres András – Roman Catholic Bishop, Archbishop of the Diocese of Győr

Vértesaljai László – Jesuit priest, editor of the Hungarian broadcast of Vatican Radio

Nemzeti Humanitárius Koordinációs Tanács – National Humanitarian Coordination Council

Gábor Polyák & Krisztina Nagy

# Regulating health communication in the post-truth era

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## Abstract

As a global epidemic of the social media age, COVID-19 has also resulted in an 'infodemic', which means the uncontrolled spreading of false information about the health situation. Spreading of health information is a special intersection point of the freedom of speech, freedom of science, and the fundamental right to life and health. The paper analyses the European and Hungarian legal framework for health communication from multiple perspectives. Regulatory challenges and solutions differ for professional health communication, commercial communication and health communication by laypeople. As with all forms of misinformation, private regulations of platform operators have a significant regulatory role to play in relation to health disinformation. As a result of the analysis, the paper provides a detailed regulatory map that also covers private regulation solutions and explores the factors that need to be considered when designing a comprehensive future regulation.

**Keywords**: infodemic, disinformation, freedom of speech, private regulation, health communication, consumer protection, scaremongering

## 1. Phenomenon of infodemic

In the age of 'new media', social risks associated with health-related communication have emerged as a new and vast area of social and communication science studies. Public communication about the COVID-19 pandemic has put the various phenomena surrounding the changes in the informational environment into even sharper relief. These phenomena render it necessary to perform a more comprehensive review and re-conceptualisation of the regulatory framework concerning health communication. The characteristic features of social media, as well as of the network-based communication associated with the latter, in conjunction with the collapse of the previously dominant information gatekeeper system, are all framework conditions that shape the circumstances governing the dissemination and reception of information. The pandemic has drawn attention to the fact that human health does not depend on healthcare services alone but also on the health of the informational environment, on whether people have access to reliable and accurate information which allows them to properly inform themselves on the nature of the threat they face; whether they are equipped with the proper instruments and methods for shielding themselves against it (OSCE, 2020); whether there are

safeguard institutions and procedures in place that guarantee access to relevant information; and whether the informational environment promotes the protection of health.

The unique nature of the pandemic has indisputably put the role of public communication front and centre as it has enhanced and highlighted the significance of access to credible and reliable information. In the absence of vaccines and an effective treatment, the classic public health strategies and non-pharmaceutical interventions (NPI) (such as for example masks, regularly washing hands and social distancing) have played a vital role in containing the spread of the virus. Public awareness of NPIs and their applied practice are also contingent on the effectiveness of public communication, its persuasiveness (Nan & Thompson, 2020).

As a result of the rise of social media, we have seen a concomitant surge in the quantity of user-produced health content being spread in the information environment. These also attract substantial attention and generate massive social media traffic alongside the public service announcements (PSAs) issued on social media by public health organisations. Research shows that an influencer encouraging the public to wear masks – or seeking to dissuade them from doing so, for that matter – often reaches larger swathes of the public than information issued by official bodies (Nan & Thompson, 2020). The widespread use of social media, however, has also resulted in a significant increase in the quantity of false, misleading, or dubious health information in public discourse (Lazer et al., 2017).

As the first global epidemic of the social media age, COVID-19 has also resulted in an 'infodemic'. The information epidemic is described by WHO as follows: 'infodemics are an excessive amount of information about a problem, which makes it difficult to identify a solution. They can spread misinformation, disinformation and rumours during a health emergency. Infodemics can hamper an effective public health response and create confusion and distrust among people' (cited by UN DGC, 2020).

Already at the onset of the pandemic, the WHO called attention to the risks emanating from the informational environment, which have escalated together with the spread of the virus (WHO, 2020a). Already in previous historical periods we saw that epidemics gave rise to the spread of false and unfounded information.[1] What is novel about the current situation is the accelerated pace of proliferation of this type of information and its increased impact due to the larger mass of such information. In other words, existing communication technologies exacerbate the impact of false (unfounded, unproven) and harmful health information. A vast mass of unprocessed information that is allegedly scientific circulates in public and reaches audiences who lack the training to properly parse such information (Viswanath et al., 2020).

King and Lazard believe that the infodemic is a corollary phenomenon: the information environment is inundated with information of varying accuracy and usefulness, which makes the quest for credible information increasingly challenging. These conditions make information scanning exert a questionable influence, and the sharing of information can lead to undesired consequences, such as the spread of misinformation (King & Lazard, 2020). The risks are further exacerbated by the widespread uncertainty in society which leads to lacking protections against misinformation and a growing susceptibility to conspiracy theories (Krekó, 2018).

Another aspect of the emergence of the infodemic was an unusual fusion of organised groups on the internet, united only in their opposition to government measures aimed at limiting the spread of the virus. These include groups espousing conspiracy theories, anti-science groups, pro-gun lobbies and anti-vaxxer groups; these cooperate either deliberately or coincidentally in voicing their convictions. Social media has contributed to the increased risk

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1    See Tussay (2021, pp. 123 and 126) for some examples of tackling the issue in early modern England.

of the spread of disingenuous and misleading information. It has elevated the communication of groups that previously communicated in the hidden niches of the internet into the mainstream and has made it part of the public discourse that reaches large swathes of society; this phenomenon is referred to as the mainstreaming of disinformation. What made the current situation unusual was that there are also figures wielding public power – political players – who amplified the voices of the groups that engage in misleading communication (Viswanath et al., 2020).

Misleading, inaccurate or false health information may have critical consequences, since misinformation on health issues can jeopardise people's life and health. Not only of individuals, but of entire societies. Misleading anti-vax campaigns, for example, which lack a scientific basis and are based on fake news, can result in lower rates of immunisation. Furthermore, misinformation also impairs the credibility of health service providers and can lead to the flawed administration of drugs, foods, and vaccinations (Sameer et al., 2019).

The infodemic is a complex social phenomenon which cannot be explained merely with reference to changes in the info-communications environment. To understand and properly manage it, we must at the same time also understand the broader social and political context. Analyses examining the informational environment in the early period of the pandemic – including a study by the Reuters Institute (Brennen et al., 2020) – highlight the fact that political actors and opinion leaders also played an active role in fomenting the spread of false or misleading communication. The study suggests that 20 per cent of the misinformation in the sample collected as part of the research was originally disseminated by leading politicians, celebrities, or other prominent figures of public life; at the same time, however, this subset drew a disproportionate share (69 per cent) of total social media engagements in our sample. These results cast light on the effectiveness of top-down disinformation and the role of mainstream politics in creating informational uncertainty. Among the social consequences of the infodemic, the WHO notes that disinformation polarises the social debate on the pandemic; it increases the prevalence of hate speech in public discourse along with the risks of social conflicts and violence; and in the long run it constitutes a threat to democracy, human rights, and social cohesion (WHO, 2020b).

In discussing infodemic-related phenomena, our emphasis will be on the risks stemming from misleading and false communication. In this context, we examined how far the prevailing regulatory instruments concerning health communication provide adequate protection, and where there might be need for further regulation.

The time since the onset of the pandemic has made clear that the related infodemic is not a homogeneous phenomenon. A multitude of different players with their own motivations disseminate information of highly varied quality (Brennen et al., 2020). The problem is very complex, and does not centre solely on the issue of misleading or false health information. A substantial portion of communications-related challenges stems from equivocal and unclear official (state) communication. A case in point is the official communication during the early phase of the pandemic concerning the wearing of masks. Even though masks are effective in slowing the spread of the virus, during the first phase of the epidemic the U.S. healthcare administration, including for instance the Surgeon General, suggested otherwise in their communication (Noar & Austin, 2020). American immunologist Anthony Fauci, senior healthcare advisor to Joe Biden, did not initially support the wearing of marks, primarily out of concern that rising public demand for masks would create shortages in the supply of healthcare workers. Fauci later modified his communication once the supply of masks had stabilised and

pertinent research further highlighted their effectiveness in stemming the spread of the virus (Noar & Austin, 2020).

Misinformation concerning COVID-19 is as highly varied as information on the subject in general (Brennen et al., 2020). It cannot be reduced to the problem of information that is harmful to human health. Based on research examining the communication environment that emerged around the pandemic, a major portion of false and misleading information emanated from the activities of healthcare organisations or authorities, and hence these constitute a threat to public health broadly understood (Brennen et al., 2020). Since the level of public trust vested in health organisations is a key component of the credibility of epidemiological measures and defensive actions against the pandemic, potential misinformation concerning the latter will have a major impact on the course of the epidemic. At the same time, however, social trust in the latter is by no means independent of the communication activities of health organisations and public bodies, their transparent and clear communication.

Based on these starting points, our research questions are the following:
- What is the status of health information from the point of view of the freedom of expression? What are the fundamental rights standards of regulatory interventions regarding health information in the intersection of free speech, free research and the right to life and health?
- What are the legal guarantees of the credibility of health information concerning the professional, the commercial and the lay communication?
- How far did Hungarian criminal law succeed against the publishing of fake information, and the spreading of untrue health information?
- What is the role of private regulation created and enforced by social media platform operators?

Our research methods were the following:
- Analysing the European and Hungarian human rights framework – EU law, decisions of the Hungarian Constitutional Court and the European Court of Human Rights – regarding health communication.
- Analysing the Hungarian legal and ethical framework of health communication and its practice.
- Analysing the Facebook Community Standards in terms of health information.

Our hypothesis is that the freedom of speech and the freedom of science do not make it possible to forbid the spreading of all kinds of untrue health information, but they oblige the state to guarantee effective legal tools to defend against harmful health information and to access accurate information on the health situation. However, the new media system based on global social media networks make it unavoidable to reframe the role of the state, and to involve social media providers in the creation and enforcement of the rules on health information.

## 2. Fundamental rights collisions

Of course, when defining the limits of health communication, one cannot ignore that an abuse of freedom of opinion in this case violates or threatens the fundamental human right to life and health. The right to life, as the right at the head of the human rights hierarchy, obviously makes it necessary to restrict freedom of opinion. The more directly a given communication endangers human life, the broader the scope for state intervention to qualify as proportionate restriction. However, the degree of threat to human life depends not only on the content of

the communication. In this case, too, the standard of the Hungarian Constitutional Court is valid, according to which it is not the content of the communication, but its effect that justifies the state intervention. The persuasive power of official information provided on health products, information from a doctor or pharmacist, is enormous: such information compulsively determines the related decisions of lay people. There is a greater individual responsibility for the use of health information from other lay people or from uncontrolled source, such as on social media. A decision based on such information has serious individual and community consequences, so the individual can be expected to be more careful in using making use of the information. However, lay information is also often presented as information from a professional, and individual decision may affect not only the life and health of the individual, but the community as a whole. The state has an obligation to protect public health as well as to create the conditions for free expression. Furthermore, when setting the boundaries of health communication, it should not be overlooked that scientific results are often not final, and that science is taken forward by open debate.

An important starting point for both the freedom of opinion and the freedom of science is that 'the state is not entitled to decide on the issue of scientific truth, only the practitioners of science are entitled to evaluate scientific research.'[2] This primarily means that the conclusion of scientific debates is not a state competence. However, it does not mean that claims confirmed through proper procedures of science cannot be defended by courts or other public bodies against claims to the contrary. It is also obvious that science itself is constantly evolving because of scientific debates. Scientific claims previously considered proven may be questioned as a result of further research, and in that process, the state again has no opportunity or right to take a stand. Complicating matters further is the fact that science has recognized institutions and organizations that legitimize scientific claims, but these institutions also do not enjoy exclusivity in defining scientific truths. In principle, there is nothing to prevent anyone from outside the system of scientific institutions from questioning the results that have already been legitimized, in addition to using a method that was also previously unknown or not used in the field. The present study addresses mostly the relationship between medical scientific research and freedom of opinion, but the same issues arise even more sharply in the social sciences. While the results of science can typically be verified by measurements, the same cannot be said for the social sciences in a significant number of cases.

Responsibility for health communication varies between professionals (doctors, pharmacists) and lay people. Because of the persuasive power of professionals' communications, the impact of a given communication on the audience is quite different than if the same communication is not from an expert. Communication between doctor and patient, or between pharmacist and patient, is a highly asymmetric yet trusting relationship (Lim & Jo, 2009). A key element of this relationship of trust is patient information, which is regulated in detail by both legislation and ethical standards. At the same time, the social impact of professionals' communications in the media is greater, as information published through the media or through any public forum affects many people at once.

American free speech literature treats professional speech as a separate category. According to Haupt, professional speech provides 'insights through the professional to the client, within a professional-client relationship' (Haupt, 2017, p. 159). The U.S. court in the case *King v Governor of New Jersey* found that professional speech is subjected to a higher level of scrutiny. However, the court explained that 'the reason professional speech receives diminished

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2     Article X Section 2 of the Hungarian Fundamental Law.

protection under the First Amendment [is] because of the State's longstanding authority to protect its citizens from ineffective or harmful professional practices.'[3] It is constitutional to restrict freedom of opinion in order to protect citizens from harmful or ineffective professional practices. Speaker status thus, according to the U.S. court, justifies a broader restriction on expression.

In connection with the regulation of health communication, the obligation of the state to protect the constitutional institutions arises several times. Not only individual, subjective fundamental rights claims can be deduced from human rights, but also the state's obligation to guarantee the 'abstract value, life situation, freedom' behind the given fundamental right. The so-called objective side of the fundamental rights protects constitutional institutions, imposes an obligation on the state to protect institutions independent of individual fundamental rights requirements. According to the Hungarian Constitutional Court, the right to health is 'a constitutional task performed by the central bodies of the state and [...] local governments.' This constitutional task includes, in addition to maintaining the system of health care institutions, the creation of an economic and legal environment 'which provides the most favorable conditions for a healthy lifestyle of citizens, thus preserving human health [...] ensuring the prevention of diseases; potentially suitable for maintaining a healthy lifestyle.'[4] The Constitutional Court has repeatedly stated that the right to health 'cannot be interpreted as an enforceable fundamental right,' i.e., no concrete, accountable state measures follow from it. However, in the current communication environment, health prevention necessarily involves tackling health misinformation and creating the conditions for authentic health information.

The European Court of Human Rights (ECtHR) has rendered several decisions in which it touched on the issue of the protection of health as a legitimate objective of the limitation of the freedom of opinion. In the case *Vérités Santé Pratique SARL v. France*, for example, it justified the restriction with an explicit reference to the patients' rights not to be exposed to unverified medical information. The health magazine *Vérités Santé Pratique* had disseminated unverified medical information which discredited the conventional treatment given to patients with serious illnesses. For this reason, the joint publications and press agency commission refused to register the paper as a special press product entitled to certain advantages under a special regime specifically applicable to the press, including preferential postal rates and tax relief. Otherwise, the paper was allowed to continue publishing. According to the ECtHR, the public health grounds invoked by the public authorities to justify the given restriction of press freedom were pertinent and sufficient.

In this case, the Court established a specific standard for health communication by stating that 'while nothing prohibits the dissemination of information that offends, shocks or disturbs in a sphere in which it is unlikely that any certainty exists, this may only be done in a nuanced manner.'[5] 'Nuanced manner' is not a well-established standard. What is clear, however, is that the court applies more restrictive standards to opinions concerning health issues as compared to other expressions.

Examining the regulation of tobacco advertising, the Court concluded that the 'fundamental considerations of public health, on which legislation had been enacted in France and the European Union, could prevail [...] even over certain fundamental rights such as freedom of

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3    King v. Governor of N.J., 767 F.3d 216 (3d Cir. 2014).
4    Order 3374/2017. (XII. 22.) AB.
5    Vérités Santé Pratique SARL v. France (dec.) (74766/01); Information Note on the Court's case-law No. 81, December 2005.

expression.'[6] The existence of such a 'fundamental consideration' was derived from the fact that there was 'a European consensus' concerning the issue. Correspondingly, the notion of a 'European consensus' may well be dispositive in the assessment of the veracity of any health information. The existence of a 'European consensus' in that specific case was supported by the existence of EU-level legislation, which thus relieves the Court from the burden of having to take a stance on the question of scientific truth.

At the same time, however, in other decisions the ECtHR has emphasised the importance of public debate on health issues. According to its position on *Hertel v. Switzerland,* it is necessary to reduce the extent of the margin of appreciation of the national authorities 'when what is at stake is [a given individual's] participation in a debate affecting the general interest, for example, over public health.'[7] In other words, a regulation may not be so restrictive as to impede free debate on health issues. The Court also claimed in this decision that also in case of health communication, 'it would be particularly unreasonable to restrict freedom of expression only to generally accepted ideas.'[8]

In the *Mamère v. France* case, the ECtHR examined a particular aspect of the public health debate.[9] The applicant in the case was found guilty by a French court on the count of slander because the applicant had claimed in a television show in 1999 that the leader of the competent authority had failed to properly inform the public at the time of the Chernobyl nuclear disaster, which resulted in severe health consequences. According to the Court, the case was 'one where Article 10 requires a high level of protection of the right to freedom of expression, for two reasons. The first is that the applicant's remarks concerned issues of general concern, namely, protection of the environment and public health.'[10] The criticisms advanced by the applicant 'were part of an extremely important public debate focused in particular on the insufficient information the authorities gave the population regarding the levels of contamination to which they had been exposed and the public-health consequences of that exposure.'[11]

Thus, the ECtHR extends robust protection to criticism of the state's actions concerning health. In the aforementioned case, the French court even denied the applicant the right to prove the veracity of his claims. At the same time, however, the Court does not protect untrue factual claims. Since in the case at hand it would have been possible to present proper evidence based on the relevant documents, the failure to produce evidence cannot serve as a ground for holding the applicant accountable.

The ECtHR's jurisprudence affirms our original assumption that the limits of health communication are narrower than the general limitations of the freedom of opinion. At the same time, primarily with in terms of the state's health measures, it also emphasises that narrower limits with respect to health information may not serve to preclude public discourse. The difficulty of balancing these two is readily apparent in the fact that the Court itself applies such vague standards as 'nuanced manner' and 'European consensus'. It is impossible to derive a generally applicable standard from the case-law.

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6    Société de conception de presse et d'édition et Ponson v. France (26935/05); Information Note on the Court's case-law No. 117, March 2009.

7    Case of Hertel v. Switzerland (59/1997/843/1049), § 47.

8    Case of Hertel v. Switzerland (59/1997/843/1049), § 50.

9    Case of Mamère v. France (12697/03).

10   Case of Mamère v. France (12697/03) § 20.

11   Case of Mamère v. France (12697/03) § 20.

## 3. Regulatory mapping

Health communication gives rise to such a multifaceted set of problems that it requires complex regulatory solutions. False or even inaccurate health information can lead to mass disaster, as can potentially deficient communication concerning public health crises. In this context, the freedom of expression and the freedom of information square off against the protection of life and physical integrity. One segment of health communication concerns health products (medicinal products and medical equipment) and services, while another is simply part of the general public discourse. The first category marks a distinct area of consumer protection, while the scope of the latter includes, for example, disinformation concerning the public health situation and health products. The need of the public to be properly informed about health issues also gives rise to distinct expectations with respect to the freedom of information: representatives of the state and healthcare organisations bear a major responsibility for providing swift and accurate information. This obligation is especially obvious in the time of pandemics.

### 3.1 Classification of health communication

We can classify health communication based on two criteria. For one, we distinguish between professional communication and communication by laypeople. A second vital criterion distinguishes between commercial and non-commercial communication. To qualify as professional health communication, a given message must be disseminated by a healthcare professional, typically a physician or a pharmacist. One form of professional communication is the medication guide that accompanies medical or medicinal products. Professional communication may be direct, that is, it may transpire between the physician or pharmacist and the patient, or may be public in situations when it is not addressed to a single or a few selected patients. Any communication outside the range of the aforementioned qualifies as lay communication. Commercial communication is always aimed at the sale of some type of medical product[12] or service. In the absence of such motivation, the given communication does not qualify as commercial.

The significance of these distinctions is that in terms of their impact, they involve very different communicative situations which correspondingly necessitate very different regulatory interventions. The definition of professional communication falls under the scope of regulations concerning healthcare professions – and there is already an existing framework in place there –, while commercial communication is subject to detailed consumer protection rules regardless of the nature of the product or service in question.

The underlying assumption that informs consumer protection regulations concerning medical products or services is that the possibility of labelling a given product or service as one that contributes positively to health substantially increases the desirability of the product or service in question. It is relatively easy in this context to abuse consumers' confidence and their lack of information, which is why corresponding regulations and the application of the law set strict conditions for distributing goods as medicines or as substances having a medicinal effect.

With respect to regulating health communication, it is also relevant to consider who is involved – who the participants are – in a given communicative process. A typical communi-

12 We classify as health products all types of products that have an impact on health, including foodstuffs, nutritional supplements, medications and medical equipment.

cation situation is one in which a healthcare professional conveys something to a lay patient. Such a scenario is highly asymmetric on account of the professional's expert knowledge and the patient's sensitive and vulnerable situation. This asymmetry in their relationship also prevails in a scenario when the lay recipient of the communication does not encounter the information disseminated by the physician/pharmacist directly but through the media or social media.

The media and social media are also involved in the process of health communication. Thus, in principle, they can be subject to specific regulations which account for the unique nature of this particular type of communication; examples include media laws and the regulations of information society services (e-commerce). These regulations reflect – or may reflect – the specific features of the underlying communication platform. The regulation of traditional mass communication platforms – newspapers, radios, televisions, news sites – as well as that of social media primarily focus on the issue of when and in how far the given platform is responsible for the contents they disseminate. While in traditional mass communication media assume responsibility for the contents they disseminate by virtue of the underlying editorial decisions, in the case of social media the platform operator assumes a responsibility for the contents disseminated on their platform by virtue of the fact that the platform provider classifies and filters these contents based on the policies it designed itself, which are enshrined in the terms and conditions of use and implemented with the help of algorithms.

The aspects of health communication that we examined here are primarily manifested in health and consumer protection regulations, both at the EU and the member state level. Some of the phenomena examined in this study are also subject to criminal law provisions. The particular rules that apply to various communication platforms are enshrined in media and e-commerce law.

## 3.2 Regulating professional health communication

The regulation of communication disseminated by physicians and pharmacists primarily concerns their direct communication with patients. There is also a less extensive corpus of legislation regulating the public communication performed by health professionals. Among the fundamental principles governing these areas, the Hungarian *Health Act*[13] states that everyone has the right to access information/knowledge that will allow them to be informed about the possibilities for preserving and improving their health and to render decisions concerning their health based on appropriate information (Article 5 (3)). Everyone is entitled to receive information on the relevant features of health services provided by healthcare providers; the availability of these services; how they can avail themselves of the latter; as well as the rights of patients and the possibilities for asserting these rights.

The communication of physicians and pharmacists is rather extensively regulated by sectoral legislation and the relevant professional codes of ethics. A key element of the underlying trust-based relationship is the information of patients, which is regulated in detail by both legal provisions and codes of ethics. Among other things, the *Code of Ethics of the Hungarian Medical Chamber* stipulates that information relayed by physicians to their patients must be 'true, objective and sincere' (Article II.5.3). Pursuant to the *Code of Ethics of the Hungarian Chamber of Pharmacists,* a pharmacist must respond with 'increased due diligence' to all ques-

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13    Act CLIV of 1997 on Health Issues.

tions a patient may have concerning a medication, other products or a health condition and the related symptoms (Article 8).

The *Code of Ethics of the Hungarian Medical Chamber* dedicates a distinct chapter (Chapter II.27) to the regulation of media appearances by physicians. According to the Code of Ethics, 'information disseminated to the public must be clear, factual and unbiased. Such information may neither trigger unfounded fears or unrest nor arouse unfounded hopes or expectations in society at large or in specific groups or individuals within society' (Chapter II.27 Section 2).

By contrast, the *Code of Ethics of the Hungarian Chamber of Pharmacists* does not include provisions concerning public communication on pharmaceutical drugs.

A physician or pharmacist who communicates in a way that runs afoul of the legal, ethical or professional standards of their respective professions may be guilty of professional misconduct resulting in the endangerment of others. When it comes to health communication, the effectiveness of the applicable general rules depends primarily on the operations of those who enforce the laws.

## 3.3 Commercial health communication

Most specialised restrictions concerning health communication are set in consumer protection regulations, and these pertain to both commercial practice and commercial communication. In addition to the comprehensive protections extended by the *Unfair Commercial Practices Directive* (UCP directive),[14] there are also numerous product-specific rules in place to govern health communication. The general objective of the UCP directive is to protect the free choice of consumers; it seeks to provide the legal conditions for a market and informational environment in which it is possible for a reasonably well-informed consumer who exercises due diligence to render the optimal decisions for themselves when purchasing a product or service. The consumer's decision is not free when their search for information is unfairly influenced by a corporation. According to the UCP directive, misleading or aggressive commercial practices qualify as unlawful, as does health communication that fails to comply with the requirement of professional due diligence. National oversight authorities which enforce European consumer protections rules can take action in the event of unfair commercial practices that

- attribute protective, preventive or curative effects to products;
- attribute medicinal effects to products that can be marketed as food;
- do not comply with the specific advertising guidelines for the product category in question; claims that suggest an unfounded protective, preventive or curative effect;

Apart from the general rules, the directive includes a special provision aimed specifically at health products. According to the directive's blacklist of typically misleading and aggressive commercial practices, a given item of communication is unlawful if it falsely claims that a product is able to cure illnesses, dysfunction or malformations (Point 17 of Annex I).

Special consumer protection rules apply to the distribution and commercial communication of foodstuffs, medicines, and medical equipment. The goal of the regulation is to provide for the safety of consumers and to ensure with detailed rules that when it comes to claims concerning nutrition, health and curative effects, the prevailing conditions allow consumers to make informed choices in assessing these claims.

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14   Directive 2005/29/EC of the European Parliament and of the Council of 11 May 2005 concerning unfair business-to-consumer commercial practices in the internal market and amending Council Directive 84/450/EEC, Directives 97/7/EC, 98/27/EC and 2002/65/EC of the European Parliament and of the Council and Regulation (EC) No 2006/2004 of the European Parliament and of the Council ('Unfair Commercial Practices Directive').

The regulation on nutrition and health claims made on foods is applicable to commercial food communications.[15] The Regulation formulates general principles for all nutrition and health claims, including the requirement that claims concerning nutrition and health may not be false, ambiguous, or misleading. It also lays down general and specific conditions for the use of nutrition and health claims. Among others, the use of nutrition and health claims shall only be permitted if the presence, absence or reduced content in a food or category of food of a nutrient or other substance in respect of which the claim is made has been shown to have a beneficial nutritional or physiological effect, as established by generally accepted scientific data (Article 5 (1) (a)).

European rules set special rules for food supplements. The directive 2002/46/EC[16] lays down rules on the ingredients of food supplements as well as rules concerning the distribution of products and product information. The directive further establishes a prohibition that the labelling, presentation and advertising must not attribute to food supplements the property of preventing, treating, or curing a human disease, or refer to such properties (Article 6).

The European Union has developed an even stricter and more detailed regulatory framework for the distribution of and commercial communication on medicine.[17] It establishes the rules concerning the sale, production, labelling, classification, distribution and advertising of medicinal products for human use in the EU.

The directive lays down prohibitions on the advertising of medicinal products. Thus, for example, it does not allow the advertising to the public of medicinal products that are only available on medical prescription. It also imposes positive and negative rules on the contents of advertising. For example, a positive rule is that all advertising of medicinal products to the public shall be set out in such a way that the product is clearly identified as a medicinal product (Article 89 a)). A negative rule, for example, is the provision in the directive saying that no advertising may suggest that the effects of taking the medicine are guaranteed, are unaccompanied by adverse reactions or are better than, or equivalent to, those of another treatment or medicinal product, or that the advertising of a medicinal product shall not contain, in improper, alarming or misleading terms, claims of recovery (Article 90).

In the area of consumer protection, the pandemic led to active law enforcement and increased control and inspection activities. In the framework of the European Consumer Protection Cooperation Network (CPC Network), the EU member states' consumer protection authorities performed coordinated and simultaneous inspections of products that were being promoted in connection with the COVID-19 pandemic in 2020 (European Commission, 2020a). In the process, the authorities involved also reviewed the activities of webshops and other online platforms, among others. In the case of merchants, they examined whether the various product advertisements aimed at meeting the increased demand generated by the virus for such products contained unfounded claims regarding the given product's efficacy in terms of combatting COVID-19. They also examined whether the information concerning the price of the product, the discounts offered, and the terms of shipping were clear and whether they used unfair methods to nudge consumers towards a purchase, for example by claiming that there was shortage of certain products or that the existing stocks would sell out quickly. At the online platforms (domestic and global) they selected for review, the authorities investi-

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15   Regulation (EC) No 1924/2006 on nutrition and health claims made on foods.
16   Directive 2002/46/EC of the European Parliament and of the Council of 10 June 2002 on the approximation of the laws of the Member States relating to food supplements.
17   Directive 2001/83/EC of the European Parliament and of the Council of 6 November 2001 on the Community code relating to medicinal products for human use.

gated those categories of products that were in some way connected to the pandemic, which allowed the authorities to assess the effectiveness of the proactively implemented measures taken by the platforms. Furthermore, the EU initiated active cooperation with the larger platforms in the interest of achieving closer cooperation between the online platforms and the CPC Network, and to induce the latter to take measures that put an end to the unfair commercial practices identified by the authorities (European Commission, 2020b).

The offence of fraud can be a special criminal law dimension of consumer protection. In the event of misleading health communication – for example, the attribution without proper evidence of curative effect to some substance or procedure – it is possible to establish the criminal offence of fraud if all elements of the given offence as it is defined in the law are met. In addition to forging medicines and health products, in the same context criminal law also penalises communication concerning the offer for sale and commercial distribution of such products.[18]

## 3.4 Health communication by laypersons

The main research question of the present study is what types of restrictions apply to non-commercial and non-professional health communication, that is, whether some type of general restrictions exist against health-related disinformation, or whether any such criteria could be designed in compliance with fundamental rights standards. Based on the Hungarian legal framework currently in force, we can assert that although such general restrictions do exist, they were not primarily designed with the goal of combatting health disinformation in mind. The offence defined in the Criminal Code as 'scaremongering' restricts the dissemination of false facts in specific contexts, including the spread of false health information. The offence as defined in the Criminal Code holds out criminal penalties for the dissemination of false claims at either the location where a public emergency is ongoing or during the period of so-called 'extraordinary legal orders' (a type of emergency law) proclaimed by the government.

According to the Criminal Code, the offence of scaremongering is committed by someone who posits or spreads claims regarding a public emergency that are either false or presented in a distorted manner and which are liable to alarm or agitate a large number of people either in the broader public or at the location where the emergency is ongoing. According to legal practice, a public emergency 'is an objective situation in which one or more persons – the exact number of which is either indeterminable at the time or whose number is large – or objects of significant value could be threatened' (BH1998. 304). In their analysis, Bencze and Ficsor point out that the meaning of 'the location of a public emergency' is not clearly defined (Bencze & Ficsor, 2020). Neither the law itself nor the existing case-law make unequivocally clear whether the location of a global pandemic is the entire country or merely the specific areas where an epidemic is raging within a national jurisdiction. Another source of uncertainty is where the 'location' of an online publication is, which was not published in the exact area where the emergency situation prevails but is nevertheless accessible at that location. In this context, Bencze and Ficsor point out that there is virtually no case-law on the criminal offence of scaremongering.

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18  The Council of Europe Convention on the counterfeiting of medical products and similar crimes involving threats to public health (MEDICRIME Convention). As part of the offence of counterfeiting medical products, the Hungarian Criminal Code also defines punishments for offering and selling fake medications and medical products.

Scaremongering is also realised in situations in which someone makes or spreads claims regarding a public emergency that are either false or presented in a distorted manner, and which are liable to either impede the effectiveness of the defensive measures taken to manage the emergency or to prevent them altogether. The definition of the offence raises numerous questions in terms of its legal application.

The concept of 'defensive measures' – the sum of all the measures taken to combat the emergency – allows for a relatively broad interpretation. The government can argue that during an emergency any legal, economic or communicative measures have a direct or indirect impact on the protective efforts to tackle the emergency. The 'effectiveness of the defence' is not defined either. That is why it is impossible to tell ahead of time which behaviour is liable to impede the defensive measures or induce them to fail. On the whole, the success of the emergency defence can only be evaluated in hindsight, once the emergency is over. In many cases it is far from self-evident what the short and long-term consequences of the defensive measures will be. Furthermore, the offence may be realised even in a situation in which the communication in question 'is liable to endanger the success' of the defensive measures. The reference to distortion of facts also makes it easier to impugn any public communication that runs counter to the official position on the emergency measures taken. Bodolai argues that conclusions and opinions based on actual and true facts can also provide grounds for legal action merely because these conclusions and opinions place the facts in a new context which runs counter to the official interpretation of the given facts (Bodolai, 2020).

In response to a petition filed by an individual, the Hungarian Constitutional Court has ruled that the new criminal law regulation concerning scaremongering is not unconstitutional.[19] According to the underlying complaint, the new legislation restricts the right to freedom of expression and proffers a completely unpredictable and broad scope for the arbitrary applications of the law.

The Constitutional Court held that the dissemination of scaremongering under the disputed regulation applies to a narrow range of communications: it prohibits the communication to the general public of knowingly false or distorted facts, but only if it is used at a time when a special legal order prevails in order to obstruct the protective measures taken to manage the emergency. However, the prohibition only applies to knowingly untrue or distorted statements of fact, not to critical opinions. Further, the regulation does not extend to situations when the alleged perpetrator was unaware that the communication in question contained false facts.

At the same time, in the interest of legal certainty, the Constitutional Court considered it necessary to reaffirm its interpretation that the offence as defined in the law does not unduly violate the freedom of opinion. This so-called constitutional requirement serves as the binding interpretation for all law enforcement bodies. The offence as defined in the law may only extend to the communication of facts which the perpetrator must have known to be either false or distorted at the time when they committed the act and which, in the context of the special legal order, was liable to endanger or derail the defensive measures. It is not a criminal offence to communicate facts that were disputed at the time of the offence and were only proven reliably false in hindsight.

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19   Decision of the Constitutional Court Nr. 15/2020. (VII. 8.).

## 3.5 Regulating channels of communication

The European regulation concerning legacy mass media and the various services associated with the information society do not impose any general restrictions on communications that are potentially harmful to human health. We did not find any general media law rules against misleading or false health communication. At the same time, the Audiovisual Media Services Directive (AVMSD) and the Directive on e-Commerce and certain legal aspects of information society services allow member states to restrict services emanating from other states insofar as the given service constitutes a public health risk. The AVMSD authorises member states to temporarily restrict the reception of audio-visual media services which violate the interests of public health or which constitute a severe and serious risk to the latter. Similarly to these media law rules, member states have the option of taking action against information society service providers in the interest of public health if the operations of the latter seriously and severely threaten public health.

In media regulations we only find provisions aimed at the protection of health in the area of commercial communication. These complement the general consumer protection rules and provide a special media law framework for any commercial communication appearing in the media. The AVMSD bars audio-visual commercial communications from encouraging behaviour that is prejudicial to health or safety. This prohibition allows states to act against misleading or false health communication appearing in commercial communication. The e-commerce directive does not contain such restrictions. In other words, apart from the general consumer protection regulations there are no other European legal requirements with regard to online communication.

## 3.6 Private regulation solutions by the platform providers

Infodemic has also posed a serious regulatory challenge to operators of social media platforms. As with all forms of misinformation, private regulations of platform operators have a significant regulatory role to play in relation to health disinformation (Balkin, 2018). The Facebook Community Standards do not contain specific rule for handling misleading health information, but the platform, according to its own information related to the pandemic, removes misleading health information that causes imminent physical harm.[20] Facebook has therefore begun to apply the rule set in the Violence and Criminal Behavior chapter of the Community Standards to prevent the spread of misleading information that could endanger health.[21]

According to Facebook's general approach to misinformation, Facebook does not remove false information, only reduce the distribution of these information. If fact-checking organizations commissioned by Facebook classify information as false, Facebook will present that information to users less often, i.e., the visibility of the information will be reduced. As a general rule, Facebook removes false information, if it violates another rule that provides for deletion,[22] e.g., rules against hate speech. In view of the public health emergency posed by COVID-19, an introductory text has been added to Facebook's Community Standards, in which Facebook introduced pandemic protection measures. As part of that, Facebook announced that it would remove misinformation from the platform that 'increases the risk of physical harm.'

20   https://about.fb.com/news/2020/03/combating-covid-19-misinformation/
21   https://www.facebook.com/communitystandards/credible_violence
22   https://about.fb.com/news/2018/05/hard-questions-false-news/

In the Newsroom on the Facebook's own activities, Facebook provides more detailed information about the content to be deleted.

For example, posts that make false claims about cures, treatments, the availability of essential services or the location and severity of the outbreak. According to Facebook's information they update the claims they remove, based on guidance from the WHO and other health authorities. For example, they recently started removing claims that physical distancing doesn't help prevent the spread of the coronavirus, or a post including the false claim that COVID-19 doesn't exist.[23]

From December 2020, after the first vaccinations against COVID-19 became available, Facebook announced that it would also delete false information about vaccinations that pose a direct threat to health. According to Facebook's information, they rely on health experts to assess that. Facebook removes, for example, false claims about the safety, efficacy, ingredients or side effects of the vaccines or false claims that COVID-19 vaccines contain microchips, or anything else that isn't on the official vaccine ingredient list. Furthermore, Facebook also removes conspiracy theories concerning COVID-19 vaccines that are known to be false, for instance, about specific populations being used without their consent to test the vaccine's safety.[24] In addition to removal, the social platform has introduced a number of other measures against misleading health communications.[25]

Representatives of big tech companies and the WHO have already begun to consult on the treatment of infodemic at the beginning of the epidemic (Farr & Rodriguez, 2020). The purpose of the cooperation is to ensure everyone has access to accurate information and to remove harmful content. Facebook has taken several steps to facilitate access to authentic, accurate information: they launched the COVID-19 Information Center, which is featured at the top of News Feed on Facebook and includes real-time updates from national health authorities and global organizations, such as the WHO.

Another measure made by Facebook is informing users who have met false health information. Users receive a notification that says Facebook removed a post they have interacted with for violating Facebook's policy against misinformation on COVID-19. Once users click on the notification, they will see a thumbnail of the post, and more information about where they saw it and how they engaged with it. The notification describes why the information was false and why Facebook removed it.[26]

Facebook flags information that is not deleted but labelled as false information by fact-checking organisations. Facebook distributes such false information on the platform with a label indicating their quality.[27]

In the area of commercial communications, too, Facebook has introduced restrictive measures, primarily on the grounds that people should not be able to take advantage of a health emergency for financial gain. Facebook prohibited people from making health or medical claims related to the coronavirus in product listings on commerce surfaces, including those listings that promise a product will prevent someone from contracting it.[28] In March, Facebook temporarily banned ads and commerce listings for medical face mask hand sanitizer to help

23   https://about.fb.com/news/2020/04/covid-19-misinfo-update/
24   https://about.fb.com/news/2020/12/coronavirus/
25   https://about.fb.com/news/2020/03/combating-covid-19-misinformation/
26   https://about.fb.com/news/2020/04/covid-19-misinfo-update/
27   https://about.fb.com/news/2020/03/combating-covid-19-misinformation/
28   https://about.fb.com/news/2020/12/coronavirus/#exploitative-tactics

protect against scams, inflated prices, and hoarding. The platform later eased strict advertising rules and allowed the advertising of hand sanitizers.[29]

In summary, Facebook's Community Standards alone do not provide clear guidance on what they consider to be misleading health information. Only a study of Facebook's information on content deletion reveals which misleading and false health information is prohibited in platform communications. This information also reveals which rule of the Community Standards is applied by Facebook when removing false health information. Decisions to remove content are based on the consideration of whether the health information could contribute to imminent physical harm. It is up to the decision of Facebook, but Facebook informs that false information, flagged by leading global and local health authorities, that could cause harm to people who believe it, will be removed.[30]

## Summary: The framework of future regulation for health communication

In summary, we did not find any normative framework to regulate health communication of the non-professional and non-commercial public variety, neither at the European level nor in the Hungarian legal system. Hungarian criminal law restricts health communication in certain special situations – the place where a public emergency is ongoing or when an emergency law situation is in effect –, but these restrictions are not focused exclusively on the dissemination of health information. Insofar as the given communication does not emanate from a professional and does not serve commercial purposes, there is no generally applicable legal restriction on the communication and dissemination of health communications with untrue content.

Communications in this category are regulated by restrictions in the user policies of social media platforms, determined by the platforms themselves. At the same time, however, the issue of transparency and social control over these rules and their implementation is far from resolved. Neither the user policies we investigated, nor the practices of the platform operators make unequivocally clear what kind of procedures or criteria they use to identify untrue health information. The framework of the cooperation between Facebook and the WHO is not transparent either.

In designing a potential future regulation, the following criteria should be taken into account:

(1) Changes in the communications environment allow a greater mass of health information disseminated by laypersons to reach the public than ever before. Such information reaches vast numbers of users, and some segments of these are users increasingly wrapped up in homogenising bubbles in which the credibility of untrue information cannot even be questioned. In the absence of proper data, we cannot tell with any degree of accuracy what segments and what proportion of users belong into the category of those who are especially exposed to untrue health information. What we can assert, however, is that from a constitutional perspective the risk is substantial.

Health information is always liable to threaten life and health. From a constitutional perspective, therefore, the freedom of expression squares off against the right to life and health. The right to life and health make certain restrictions of the freedom of expression necessary. Yet, this basic insight does not make clear what these restrictions might look like or what their scope ought to be. In such situations, too, the restrictions need to be proportional, the regula-

29  https://about.fb.com/news/2020/12/coronavirus/#banning-ads
30  https://about.fb.com/news/2020/12/coronavirus/#exploitative-tactics

tion should not be allowed to stifle public debates about health. Based on the jurisprudence of the ECtHR, the dissemination of untrue health claims that have been verifiably proven false are not protected by the freedom of expression. That does not at all imply that laypersons who disseminate such information in good faith but carelessly should necessarily be sanctioned. Nevertheless, the removal of such contents from public platforms cannot be construed as a disproportionate intervention.

(2) Based on the practice of the ECtHR, criticisms of the state's health policies enjoy increased protections. This makes the rethinking of the Hungarian regulation of scaremongering necessary, since the effective regulations hold out the prospect of criminal law punishments for a not clearly delineated category of criticisms directed at state policies and actions.

(3) Social media platforms are the primary loci for the public dissemination of health-related disinformation. The transparency of private internal regulations of platform operators needs to be enhanced considerably, and there ought to be room for reviewing their decisions rendered in the context of the aforementioned policies; this is a regulatory responsibility. The cooperation that emerged between providers and international and national public health agencies during the COVID-19 pandemic may prove to be a good starting point for developing the future legal framework for private regulations.

The most effective means of combating health disinformation are not legal prohibitions and sanctions, however. Instead, more proactive communication of international and national public health agencies could serve to counterbalance the spread of untrue or unreliable information. Even if such true items will not necessarily be considered as credible arguments by those groups of users who are most exposed to health disinformation, shoring up freedom of information in the area of health will inevitably reduce uncertainties regarding health information while it will significantly increase the chances of accessing reliable information. Providing the broadest possible scope of health-related freedom of information is a constitutional obligation incumbent on the state. This follows from both, the basic needs of the freedom of expression as well as the obligation of institutional protection stemming from the right to health.

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# The grand return of the troops: Militarization of COVID-19 and shifting military–society relations in Visegrad

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## Abstract

The aim of this paper is to fill the geographical gap in the literature about the militarization of COVID-19 through a comparative exploration of how the pandemic was handled in militarized ways in Hungary, Poland, and Slovakia. Drawing from official government and military statements, media articles, and expert interviews with defense intellectuals, we examine two interconnected areas – that of discourse and that of military domestic assistance. By viewing the developments through the lens of militarization and military-society relations scholarship, we argue that rather than serving as a 'portal' for civilian resilience, the pandemic constituted an unprecedented 'return of the troops' to Visegrad states and societies in terms of its size, scope, and duration, thus strengthening the pressure for re-militarization in the region that has been recorded in the last decade. The paper presents a number of analytical findings: first, it identifies the emerging gap between right-wing populist rhetoric that relied on warspeak and the human-centered communication of the armed forces; second, it reveals that military domestic assistance functioned as a military 'band aid' on systemic vulnerabilities, as well as incidentally converged with illiberal patterns of governance; third, it shows how the pandemic aided re-militarizing pressures, resulting in a significant boost to the defense sector, a positive public opinion about the armed forces, and military-society relations.

Keywords: COVID-19, militarization, military-society relations, Visegrad, illiberal politics

## Introduction

As the COVID-19 pandemic progressed globally, critical military scholars and analysts observed the international trend towards the militarization of governments' responses to the crisis, pointing to both the scale and nature of military involvement in civilian realms. As they noted, countries around the globe have turned to military personnel and resources to alleviate the pandemic; politicians often framed the cascading health crisis in militarized language; and military effectiveness partially overshadowed structural and civilian-based reforms and solutions to the crisis (Enloe, 2020a; Giroux & Filippakou, 2020; Kalkman, 2020). In more vulnerable contexts, the negative impacts of a militarized pandemic response were observed on civil rights and civilian control over the defense sector (Isacson, 2020). So far, in the international

analyses of the militarization of the pandemic, the perspective about and from Central Europa (CE) and Eastern Europe (CEE) has been missing, reflecting the general absence of critical military and security scholarship in the region. However, as this paper argues, the militarization of COVID-19 in CE has its own pressing significance and specificity.

In this region, the pandemic met states and societies in an 'interregnum' period marked by intensified external and internal pressure to increase their defense preparedness after decades of its deprioritization in line with post-Cold War trends of structural demilitarization. Although military domestic assistance is not unprecedented in the Visegrad region, the previous security challenges for which armies were engaged (e.g. Central European floods or international football championships) were not experienced by the entirety of society for a long period of time. Against this background, COVID-19 constituted a major, unprecedented crisis event for CE societies; one imbued with 'sufficient identity and coherence that the social collectivity recognizes [it] as discrete and important' (Berezin, 2012, p. 2). The pandemic also resulted in a 'militarization of everyday life' (Meyer & Visweswaran, 2016) that has not been recorded in the region since 1989 in this size, scope, and duration. In metaphorical terms, in pandemic-struck Visegrad, COVID-19 'became war, and the military became everything' (Brooks, 2016), with the health crisis being narrated in military terms, and the armed forces permeating the social realm in intensified ways, employed to 'fix' vulnerabilities generally addressed by civilian institutions.

The conceptual-theoretical background that undergirds this paper is the overlapping literature on military-society relations and militarization, understood as an increase in the 'penetration of social relations in general by military relations' (Shaw, 2013, p. 20). The aim of this paper is to fill in the regional gap in global literature on the militarization of COVID-19 through a comparative exploration of how the pandemic was handled in a militarized way in three Visegrad states: Hungary, Poland, and Slovakia. By applying a broader comparative perspective, understood as providing 'individual, structural, and cultural explanations for observed political phenomena' (Landman, 2000, p. 284), we identify similarities and differences in the developments in these countries. In order to explore how the military realm permeated the social one during the pandemic, we examined developments and published materials from the time of the first-announced COVID-19 cases in each country (February/March) until the end of November 2020. The points of country comparison were: 'war' frames and metaphors in governmental and military discourse, as well as the scope and form of military deployment. Due to the scarcity of publicly available information, as well as the lack of scholarship on militarization in the region, the paper relies on a combination of secondary sources (official communication from state and military bodies, defense policy documents, and media coverage) and interviews with defense experts.[1]

Through the analysis of collected data, the argument presented is of an analytical nature: as a major crisis event affecting societies as a whole, the pandemic has constituted an unprecedented 'return of the troops' to Visegrad states and societies in terms of its size, scope, and duration, and this militarization of COVID-19 has strengthened pre-existing pressure for remilitarization in the region. The paper is structured as follows: the first section contextualizes military developments during the pandemic by discussing military-society relations in post-1989 CE to the present. Section two compares the militarization of COVID-19 in the three Visegrad states on the discursive level, showing how governing politicians tended to rely on

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1    A total of eight interviews were conducted between September and December 2020; the experts themselves asked for their anonymization.

warspeak, while the armed forces communicated in more professional and human-centered ways. Section three explores the nature of military domestic assistance in the three countries, showing how it functioned as a military 'band aid' for systemic vulnerabilities, and an incidental tool of illiberal 'regime defense.' The concluding section discusses the implications of COVID-19 for military-society relations in the region as liable to strengthen the regional trend to militarization.

## 1. Central Europe in flux: structural demilitarization and emerging remilitarization

From the perspective of military-society relations, the pandemic arrived in the three Visegrad states at a time of transition – a period of slowly progressing change in the armed forces, and their position in states and societies. This shift has been one from post-Cold War structural demilitarization towards limited and regionally diverse patterns of re-militarization. Military-society relations are broadly understood in this paper as the sphere of interactions between the military and the society from which it springs (Forster et al., 2003). Militarization, in turn, is conceptualized in a broad, analytical way, as a 'step-by-step process by which something becomes controlled by, dependent on, or derives its value from the military as an institution or militaristic criteria' (Enloe, 2000, p. 281). This section zooms in on those broader, structural processes of demilitarization and re-militarization that provide the context in which the 'return of the troops' to CE during the pandemic should be understood.

### 1.1 Structural demilitarization after the Cold War

After 1989, scholars of militarism and military-society relations argued that a 'silent revolution' of demilitarization (Sheehan, 2008) had occurred in the region, with the waning of the classical militarism of the Cold-War era making way for a post-militarist model of military-society relations (Shaw, 1991; Forster et al., 2003). The post-militarist trend can be unpacked by identifying a number of common processes that occurred in post-1989 CE. First, the stable geopolitical environment after the fall of the Soviet Union, coupled with the accession of former Eastern bloc states to NATO and the EU, diminished the chance of a military conflict in Europe, yet raised novel global security risks to the forefront (Kuhlmann & Callaghan, 2000, p. 3). Second, this perception of weak military threats to national territory led to the de-prioritization of the military in favor of other areas of state reform and expenditure, especially in the context of the severe economic constraints of the early transition period. Consequently, armies in the region underwent cuts to their budgets, personnel, and bases. Third, CE armed forces embarked on a shift from a mass, conscript-based model towards the creation of smaller, flexible, expeditionary, and professional forces (Moskos et al., 2000). Fourth, following these reforms, CE societies became increasingly detached from their armies, with citizens' active participation in and direct interactions with military institutions becoming the exception rather than the norm, and the notion of (male) citizenship no longer contingent on military service. Finally, the transformation pushed armies to search for new sources of salience and legitimacy to justify their financial and social demands to the public, yet these efforts were uneven and met with some resistance across the region. Nevertheless, the 'old' roles of regime defense, nation building, and territorial defense have been significantly substituted by 'new' roles of military domestic assistance and military diplomacy (Forster et al., 2003). In the second decade of the twenty-first century, this steady and multi-faceted process of the demilitarization of CE states and societies has been disrupted by novel processes of militarization.

*1.2 Patterns of militarization*

Analysts have explained the ongoing re-militarization in CE as a response to 'objective' geopolitical challenges (Dempsey, 2017), a correlate of democratic swerving (Bergmann & Cicarelli, 2020; Lopes da Silva, 2020), and a consequence of growing insecurities stemming from the crisis of globalized neoliberalism (Grzebalska, 2020b). No single explanation is sufficient, but rather it is a combination of these factors that translate into the current remilitarizing trend in the region.

Due to a number of novel security challenges in the region – the war in Donbas, mass migration, climate change, and resurgent terrorism – NATO's strategy for its eastern flank shifted. NATO's combat presence in the region increased, formal pledges by allied countries to raise defense spending to 2 percent of GDP and accelerate army modernization were made, along with a strong focus on increasing their own defense capabilities in line with Article 3 of the NATO treaty (Dempsey, 2017). After 2015, Global Militarization Index reports indicate an increase in militarization in CE – a significant rise in military spending, armaments programs, and military personnel (Mutschler, 2016; Mutschler & Bales, 2020). What are not captured by these reports are the revived efforts to bring societies closer to defense through programs promoting military skills, traditions, and careers. Rather than being purely a top-down process, regional militarization has also proceeded on the grassroots level, with a regional resurgence of paramilitary and vigilante activism (Kandrík, 2020).

Poland has seen the most intense development of militarization among the countries under analysis. Following the war in Ukraine, public opinion polls showed an increased perception of military threat in society (CBOS, 2018, p. 8), while the government increased defense spending and military modernization, and also formed a new volunteer Territorial Defense Forces (TDF), ultimately set to amount to 53,000 soldiers. The Ministry of Defense (MOD) undertook efforts to boost recruitment and military preparedness through increasing the number of military-type classes in public schools, financing shooting ranges, and increased support for and cooperation with paramilitary civil society organizations (Grzebalska, 2020a). In 2020, all these efforts were centralized under a new MOD-led bureau. In Hungary, increased militarization efforts have been recorded following the *Zrínyi 2026 Program* that includes both army buildup and modernization, as well as the popularization of defense careers and national-military traditions in society. In recent years, the country has recorded 'more emphasis on defense and military issues' (Interview HU1), signified by developments such as the voluntary Defense Cadet program in public schools and defense summer camps for youth, the introduction of defense-based education classes in high schools, the financing of shooting ranges and National Defense Sports Centers across the country, as well as plans to build up to ten new military high schools by 2030. Slovakia has seen the lowest level of defense preparations due to the lack of political consensus about defense and security policy (Ulrich, 2003). After 2015, the country increased its military expenditure and inventory acquisition (Mutschler, 2016), and a new military program for preparing students for army careers was opened in 2019 in a vocational school in Bernolákovo. In 2020, the new government declared its plans to 'create conditions to satisfy citizens' interest in military issues' (Government of the SR, 2020), and prepared a new defense strategy. Meanwhile, the country has seen the rise of Slovak Conscripts, an unregistered paramilitary organization with a far-right orientation. In this context, experts expect the Slovak Armed Forces (SAF) to engage more with schools and youth, and to organize more recruitment events and awareness-raising campaigns (Interview SK2).

Processes of militarization have been met by significant economic and societal barriers. In Hungary, militarizing efforts have been constrained by strong anti-militarist societal sentiment and a relatively low level of trust in the Hungarian Armed Forces (HAF) (52 per cent according to IRI, 2017) due to their 'doubtful political reliability' as an institution that 'lost every war between 1487 and 1991' (Dunay, 2003, p. 76). In Slovakia, the army enjoys a high and stable level of public trust (72 per cent, Hajdu & Klingová, 2020) as a potent symbol of independent statehood, yet societal 'interest in […] military or national security affairs is low' and marked by significant political polarization concerning defense policy (Ulrich, 2003). In Poland, cultural militarism has remained strong due to historical legacies of independence struggles, yet widely shared trust in NATO and a professional army as the guarantor of security has aided structural demilitarization, while the internal employment of the army during state socialism created long-lasting suspicion of military assistance in internal security matters (Latawski, 2003).

With this background, it is perhaps surprising how integral, visible, and uncontested military permeation into society has been during the pandemic throughout the region. In the next two sections, we explore the militarization of the pandemic in Visegrad by zooming in on discourse and military employment.

## 2. Government in full armor, and an army with a caring face? Discursive aspects of militarization

The pandemic was discussed by politicians and media within different frames, among them solidarity, science, and particularly, 'war' (Ellerich-Groppe et al., 2020; Enloe, 2020b; Maďarová, et al., 2020). This warspeak served numerous goals: managing uncertainty, justifying radical restrictions, and mobilizing social solidarity and public support for statesmen in times of the pandemic (Laucht and Jackson, 2020; Peckham, 2020). In Visegrad, politicians turned to martial metaphors, and military institutions and personnel became newly visible in the discursive space after years of public disinterest and a low level of knowledge about the actual activities of the armed forces in the region (Forster et al., 2003). Moreover, the military started to build up a 'human' and 'caring' face, partially enabled by the war-like rhetoric of politicians who construed the pandemic as a battlefield.

### 2.1 'Let's go to battle': Government communication during the pandemic

The militarization of government communication could be traced on two levels – in the process of communication, and in metaphors and framing. In Poland and Hungary, government centralization of crisis communication came at the expense of transparency and pluralism. While in some European states politicians relied on expert virologists and non-government institutions to help inform the public about the situation, in Poland, crisis communication was almost exclusively undertaken by government officials (Interview PL1). An advisory Medical Committee to the PM was created only at the end of October, but was accompanied by medical staff employed by the Ministry of Health being the subject of an official ban on public statements (Nowosielska, 2020). In Hungary, the provision of information on the pandemic was restricted to the so-called Operational Group, and a report found that alternative sources of public information were often scrutinized as 'fake news' (Keller-Alant, 2020). In these two cases, the COVID-19 crisis became the opportunity for governments to strengthen previous illiberal interventions into media systems (Surowiec et al., 2019; Bátorfy & Urbán, 2019) and

to exercise control over the media and the process of communication, whereby ruling parties decide what the public should know.

In all countries, we observed the militarization of political rhetoric in the form of military metaphors, the celebration of 'frontline heroes,' and enemy-making. 'Let's go to battle,' proclaimed Slovak PM Igor Matovič, who took office amidst the pandemic (Mrva, 2020). Meanwhile, Hungarian PM Viktor Orbán justified lockdowns by professing that the country is 'at war and (...) operating on a military plan' (Kovács, 2020), while Polish Minister of Health Łukasz Szumowski compared his role to 'that of commander-in-chief during war' (Nycz, 2020). The framing of the pandemic as 'war' was used by governing politicians to justify the severity of the measures to the public, and to implicitly construct government officials as strong and capable leaders; the main 'protagonists' of the defense against the virus (Molnár et al., 2020). This was particularly important in the case of Poland and Slovakia, where government communication was criticized as chaotic and inconclusive, marked by internal contractions and confusing explanations of restrictions (Libura, 2020; TASR, 2020a). While government officials were the protagonists of the 'fight' against the virus, essential workers were often framed as heroic fighters on the coronavirus 'home front.' With the governments' reluctance to implement systemic reforms of underfunded and feminized healthcare systems as part of their anti-pandemic measures, warlike metaphors served to underline the need for the sacrifice of underpaid workers for the 'common good.'

Enemy-making was another marker of the militarization of political discourse during the pandemic, employed liberally to the virus, political opposition, and different social groups. Slovak PM Matovič constructed the 'enemy' not only of the virus, but also of commuters, people coming from abroad, and marginalized Roma communities (Maďarová et al., 2020). In Poland, PM Mateusz Morawiecki professed that 'the fight continues, the enemy is dangerous,' and described the 'enemy' as both an external one – the virus – and an internal one, represented by the opposition and its media who 'have thrown a spanner into the works' rather than 'offering composure and help' (PAP, 2020). The Hungarian PM continued his rhetoric of a 'struggle for spiritual sovereignty' that has made the term 'fight' an integral element of political discourse in the last decade (Interview HU2): 'All we can count on from [the Left] is backstabbing and backbiting, the undermining of national strength and solidarity, sniping at political leaders and experts leading the country's defense operation, snitching and betrayal in Brussels, sabotage and trickery' (Orbán, 2020).

Rather than being triggered by the pandemic, enemy-making and warspeak in political communication extended the broader nationalist-populist discourses of the ruling politicians who construct 'the people' as a referent object threatened by internal and external 'enemies' (Wojczewski, 2019). War-related metaphors provide a salient knowledge structure involving a fight between opposing and differentiated sides: the good 'us' and the evil 'them' (Flusberg et al., 2018). This militarized structure overlaps with the populist discursive practice developed in the countries under analysis associated with migration (Kazharski, 2018), gender and LGBT issues (Grzebalska & Pető, 2018), and even corruption (Pirro, 2015), being narrated in absolutist terms.

## 2.2 'Always ready, always close.' Military communication during the pandemic

Amidst the governments' discursive battles against the coronavirus and internal 'threats,' it was the armed forces that brought clarity and calmness to public discourse. In all three Visegrad countries, the pandemic strengthened communication channels between the military and

society, with the armed forces using both social and traditional media to share information about COVID-19, educate people about everyday security, and report on their engagement. In Slovakia, bridges between the army and the society post-1989 have been few (Ulrich, 2003, p. 62) and communication about COVID-19 resulted in a significant increase in the reach of the armed forces' social media (Interview SK1). Meanwhile, the Visegrad armed forces have also seen these reopened communication channels as a recruitment opportunity. Polish TDF used social media to appeal to potential recruits, sharing personal stories of individual soldiers and promoting a new online recruitment tool. In both Hungary and Poland, recruitment procedures were simplified and the armed forces reported an increase in applications (Dellanna, 2020; Kozubal, 2020).

Our analysis revealed the armed forces' communication as fact-based, story-based, and professional. While military slogans and terms such as 'fighting' or 'front' were used, the armed forces restrained from calling the pandemic a 'war,' talking instead about a pandemic crisis. As confirmed by a defense expert from Slovakia, in the context of a global health crisis, 'no military officer would use the terms that politicians have used' (Interview SK2). In Poland, official communication from TDF often deescalated the intensified rhetoric of the government, with military officials clarifying the nature and legal basis for military engagement that had caused controversy due to political statements. In Hungary, HAF materials largely 'omitted militant elements, striving for simplicity and clarity' (Interview HU2).

In all three countries, official military rhetoric was also considerably civilianized, underscoring the human, 'caring face' of the army and presenting the military as first responders who support society. A case in point is the official slogan of the Polish TDF ('always ready, always close') which underscores its dual nature as a group of citizen-soldiers who combine military and civil defense functions. TDF used the pandemic to showcase their civilianized character: 'Empathy is most important! All our activities we fill with care about ill individuals. We do everything so that their stress is as low as possible!' (TDF, 2020b). Similarly, official communication by the Slovak Armed Forces focused on the image of soldiers as model citizens representing our 'collective best selves' (Enloe, 2020a): 'We keep a human face – that is what our soldiers are doing daily in hospitals, at borders, and at home in civilian clothes. #wearepeople' (AF SR, 2020).

## 3. Army to the rescue: Patterns of military deployment in Visegrad

The military deployment during COVID-19 in the Visegrad region has been similar to the broader European tendencies, with soldiers providing assistance in spheres such as transport and logistics, the repatriation of citizens, border control, food and water distribution, public space disinfection, lockdown enforcement, and medical support (Laţici, 2020). Differences were recorded with regard to the use of the military in internal security tasks (Pepe & Lapo, 2020). Despite these international areas of convergence, military domestic assistance in Visegrad has its specificities. First, the scope and character of military deployment *vis-à-vis* the overall lower resilience of healthcare and care systems in the region suggests that, rather than merely complementing civilian institutions, the military has often served as a prosthesis of the latter. Second, the patterns of military deployment in Hungary and Poland in particular also revealed some areas of convergence between militarization and illiberal governance.

*3.1 Military assistance or a military 'band aid'?*

Publicly available data on the nature and scale of military involvement in the pandemic has been limited due to both military-operational reasons, and the broader non-transparency of governance. Complementing scarce information given in official communication with expert interviews, this section argues that, in all three countries, the armed forces were employed in anti-crisis operations early on after the outbreak of the pandemic, and as the crisis stretched the capabilities of civilian institutions, military engagement gradually increased both in terms of the number and hours of military personnel, as well as the scope and weight of tasks allocated to the military. What began as military assistance for complementing civilian institutions developed into a military 'band aid' – the continuous military presence in, or even military control over, key institutions and operations. As argued by one Hungarian expert, 'the military became a tool for the government to cover up the insufficiencies of the healthcare system' (Interview HU3).

In Hungary, the overall number of HAF personnel engaged in pandemic-related activities was not shared with the public, with only fragmentary data communicated by HAF (Interview HU2). As of November 2020, HAF Command announced that 1100 soldiers were supporting health care institutions, 60 were still participating in the hospital command system, 500 were patrolling the streets with the police, 2600 soldiers had participated in border protection since the beginning of the pandemic, and 2000 soldiers had undertaken disinfection-related tasks during the first wave of the pandemic alone, and more than a hundred of them had disinfected educational institutions during the fall break (MTI, 2020c). If these numbers are exhaustive, and the personnel employed in different tasks not overlapping, this amounts to 21 per cent of HAF personnel (6260 out of 29,700). By the end of November 2020, the MOD announced that 'twice as many soldiers' were engaged in pandemic-related efforts in the second wave than the first (Twice as many…, 2020). HAF also mobilized around 200 volunteer reservists in April alone to support disinfection-related tasks (MH HFKP, 2020). As the pandemic progressed, military involvement grew into a stable military presence in public spaces, and even the military command of some institutions. Following Government Decree 72/2020 of 28 March, military and police leaders were appointed to manage and control 51 out of 108 hospitals in the country, along with over a hundred 'vital' Hungarian companies, and their appointments continued beyond the state of emergency which ended in June 2020 (MTI, 2020b).

In Poland, the main military formation employed during the pandemic has been TDF. In the first month of their *Resilient Spring* operation, 50 per cent (12,000) of TDF personnel were deployed, rising to 70 per cent during the first wave of the pandemic (Zamorowska, 2020). During the *Continued Resilience* operation of the second wave, all TDF soldiers were summoned to appear at their local military enlistment agencies, and the formation switched to high intensity mode. As of October 2020, the MOD announced that at least 20,000 soldiers would engage in anti-pandemic activities, together with fourteen military hospitals and five military preventive medicine centers (MON, 2020a). TDF offered support in a number of areas: hospitals and medical services, social and psychological help for combatants and the elderly, local governments, the National Stockpiles Agency, law enforcement, border patrols, and airport control (Pietrzak, 2020a). As the pandemic turned critical, the formation progressed into a military 'fix' for the vulnerable public sector, substituting staff at nursing homes, hospitals, and orphanages, donating blood, delivering food to social welfare clients, and running a psychological helpline for the elderly. A case in point is the online app introduced by TDF to simplify the process through which local governments, public institutions, and charitable

organizations can apply for military assistance, thereby circumventing the usual bureaucratic channels. By October 2020, 11500 forms had been filed through the app by 2385 institutions (Pietrzak, 2020b).

In Slovakia, data indicate a clear pattern of increased military engagement. In March 2020, the MOD announced that up to 500 military personnel were ready to support border guards and the police during the state of emergency. During the Easter holidays, 1500 soldiers were deployed to support law enforcement during lockdown. As of October 2020, slightly over 50 per cent of SAF personnel were deployed for the countrywide testing of the population (out of 13,300 in total) and the government announced another round of countrywide testing which will utilize up to 8000 soldiers (TASR, 2020b; Zemanovič, 2020). Throughout the pandemic, military personnel helped enforce state quarantines, ensured the repatriation of Slovak citizens, provided assistance at hospitals, supported tracking of COVID-19 patients' contacts, transported medical supplies, and prepared a field hospital for patients in isolation. The army's pandemic engagement began with assisting civilian institutions and culminated in the military overseeing and conducting a countrywide operation dubbed *Joint Responsibility* that tested all citizens for COVID-19. The rationale behind entrusting the army with this task was the belief that the understaffed and underfunded public administration would not be able to do it. 'The Armed Forces are the only institution capable of handling such a demanding operation as testing the entire population,' summarized journalist Andrej Bán (2020).

The scope and depth of military engagement in the pandemic-struck Visegrad region must be understood in the context of its lower overall level of civilian resilience to health crises *vis-à-vis* Western Europe. In post-1989 CE, weak investment into healthcare and the public sector converged with efforts of Western governments to alleviate their own 'care gap' by attracting workforce from new EU Member States (Zacharenko, 2020). The three Visegrad countries are ranked low with regard to healthcare spending (6.2 per cent – PL, 6.4 per cent – HU, 6.9 per cent of GDP for HU; compare with the 8.8 per cent average for OECD; OECD, 2020). According to Human Rights Watch, low investment in healthcare in Hungary 'may have contributed to the spread of COVID-19, with about 25 per cent of total cases confirmed until mid-July contracted in hospitals' (HRW, 2020). The largest outflow of medical professionals among EU countries stems from the Visegrad region (Mara, 2020, p. 12). As a result, Poland has the lowest number of doctors per 1000 inhabitants in the EU (2.4), and Hungary and Slovakia have the EU average (3.4). In the face of these long-term medical personnel shortages, Slovak media informed that intensified pressure on the healthcare system could lead to its collapse (Katuška, 2021). These structural factors partially explain why the Visegrad states relied on extensive military assistance during the pandemic, seeing it as the only available 'band aid' for structural voids and vulnerabilities.

In a context of dire deficiencies, it is perhaps unsurprising that society viewed military assistance as necessary and beneficial. In a survey commissioned by the Polish MOD in April 2020, the majority of those polled had a positive view of military engagement during the pandemic, and 91 per cent declared that soldiers should help those in need (MON, 2020b). Likewise, in a survey published by the Slovak MOD 70 per cent of respondents claimed to appreciate soldiers' activities during the pandemic, and 81 per cent stated that Slovak Armed Forces are needed (MOSR, 2020). At the same time, some activities of the armed forces went beyond domestic military assistance, with potential illiberal patterns of military use being recorded in Poland and Hungary.

*3.2 Illiberal patterns of military deployment*

Prolific academic literature exists about the processes of democratic swerving in post-1989 CE (Polyakova et al., 2019), as well as the illiberal shift in post-2010 Hungary and post-2015 Poland as a transformation reliant on patronal politics, party state capture, and exclusionary identity politics (Sata & Karolewski, 2019, Enyedi, 2020). So far, the armed forces have been largely left out of these scholarly analyses, although several experts have raised attention to purges in the Polish military under PiS (Hooper, 2019), and the non-transparency of military procurement processes in Hungary (Inotai, 2020). This section zooms in on some controversial instances of military use during the pandemic in the Visegrad countries in the form of symbolic shows of government power and tools of government control in order to shed light on emergent illiberal patterns of militarization that vary in their form and scope.

In the three Visegrad states, military domestic assistance during COVID-19 has been enabled through constitutional law or newly adopted legislation. Military assistance was enacted in Hungary and Slovakia due to the constitutional state of emergency laws declared early on in the pandemic. In Poland, where the state of emergency was controversially not invoked, army deployment was enabled by The Crisis Management Act of 26 April 2007 and the COVID Act of 2 March 2020. No instances of military violence or repression were recorded in the three countries that were studied. Nevertheless, there were incidents of military use as symbolic shows of government power.

In Slovakia, questions about the symbolic nature of military deployment were raised during the quarantine of Roma settlements in the first weeks of the pandemic. Roma people living in overcrowded housing with a lack of infrastructure were repeatedly presented in public discourse as a threat to the majority population (Maďarová et al., 2020). Their previous experience with racism and violence from uniformed services contributed to their fear when soldiers, military vehicles, and helicopters appeared with no clear explanation from the authorities (CKO, 2020). A settlement in Gelnica was quarantined despite proof of only a single positive coronavirus case. Some settlements were locked down overnight, with quarantine announced in the evening, and the police and the military securing the areas in the morning. The media and politicians informed the public that soldiers were treating the Roma professionally and with respect. Nevertheless, the military presence was interpreted by many as a show of power, whereby Roma people became an object to be controlled and locked down, and the majority population reassured that the state is using all possible means to protect them (Maďarová et al., 2020).

In Poland, the second wave of the pandemic coincided with a government crisis and serious societal unrest.  In October 2020, mass spontaneous protests against the abortion ban erupted, some of which initially targeted Catholic churches, before a decision was made to switch to political institutions. Leaked reports revealed that PiS leader Jarosław Kaczyński wanted to use force against the protesters, but the chief of police declined (Kostrzewski, 2020). However, hundreds of military police were deployed around select churches during the largest protest in Warsaw, despite the MOD stating that soldiers would merely support pandemic operations. It was then that 200 retired generals and admirals from the armed forces and other uniformed services issued an open letter calling for the government to deescalate the crisis by dropping the ban, and reminding active-duty personnel that their role was to serve society and remain apolitical (List generałów, 2020). In pandemic-struck Hungary, civic protests were held over perceived threats to the autonomy of higher education after the University of Theatre and Film Arts was put under the management of a new board of directors. Following the

blockade of the university, a military colonel and former MOD chief of staff Gábor Szarka was appointed chancellor of the university.

In both Hungary and Poland, the pandemic also saw controversial military appointments to civilian institutions. In Hungary, military commanders with no medical or management experience were sent to hospitals and 'vital' private companies during the state of emergency – a decision criticized as another instance of an ongoing power grab (Inotai, 2020). A Hungarian former medical chief argued that 'hospital directors were not trusted, and thus soldiers and police officers were assigned to them' (Karáth, 2020). As argued by one expert, 'one of the tasks of hospital commanders is to control the information flow' (Interview HU3). In Poland, concern was raised over the appointment of a TDF chief of training, as well as a former paramilitary activist, to the Government Centre for Security responsible for crisis management. Given that military officials replaced a former officer of the Fire Service, the decision was seen by some experts as an instance of the militarization of civilian crisis management, as well as the further centralization of power by the government, which trusts TDF more than other institutions (Podolski, 2020).

After the Cold War, military sociologists observed the waning of (communist) regime defense, one of the major roles of the armed forces during state socialism, and the overall smooth transition of the Visegrad armed forces into the new political system, whereby governments restrained from using the military for controversial internal functions, and the armed forces themselves built legitimacy through new roles and an ethos of professionalism and apoliticism (Michta, 1997; Forster et al., 2003). During the pandemic, this image of the armed forces was accompanied by several controversial cases of military presence in the civilian realm, varying from the army being used as a symbolic show of state power during the quarantining of Roma settlements in Slovakia, through the military police being cast in the role of a symbolic defender of the government's illiberal reforms against protesters in Poland, to the use of the military as a tool of government control over civilian institutions in Hungary. In the latter two countries, the convergence between militarization and illiberal governance may serve as an early warning sign of the potential future pressures on the armed forces to symbolize and protect the illiberal ruling parties' political projects. However, the defense experts in Hungary and Poland that were interviewed argued that while ruling parties see the defense sector as a tool for strengthening their vision of statehood, 'this is not what military officials necessarily want' (Interview HU1).

**The troops are here to stay: Conclusions**

As a major crisis event affecting societies as a whole, the COVID-19 pandemic is seen as a pertinent case study from which to deduce the path of the politico-economic transformations of the near future. Here, some have framed the pandemic as a 'portal' – a gateway to a new world, nudging societies to leave behind the present model of politico-economic organization (Roy, 2020), while others have warned about the coronavirus crisis serving as a trigger for a new 'shock doctrine,' with controversial political solutions introduced amidst general confusion (Klein, 2020). This conundrum has also informed discussions on the future of the armed forces and their place in post-pandemic societies, with analyses both recording early signs of a military 'shock doctrine' (Lazare, 2020), and seeing a chance for political realignment away from militarization and towards civilian resilience (Sitaraman, 2020).

Entering these discussions from the context of the Visegrad region, this article contributes to filling a geographical gap in the literature. The paper has argued that rather than serving

as a 'portal' to a more civilianized society, this major health crisis has seen an unprecedented 'return of the troops,' and the militarization of COVID-19 has strengthened prior external and domestic pressures for militarization that have been observed in Hungary, Poland, and Slovakia in the last decade. The omnipresence of war frames in political discourse normalized the military permeation of civilian realms, and the wide deployment of soldiers in domestic assistance functions aided the forging of closer ties and interactions between society and the military. This newly strengthened position of the military in society was reflected in the reopening of communication channels through social and traditional media, support for military engagement in public opinion surveys, and the rise in army recruitment.

Amidst the pandemic, both Polish and Hungarian governments significantly increased their future defense budgets, referring to both prior modernization commitments and the post-pandemic recession (Palowski, 2020; MTI, 2020d), as well as simplifying army recruitment procedures. Hungarian officials used the pandemic to form new volunteer reserve forces. Set to reach 3000 personnel in 2020, the scheme was promoted by the government as a tool for creating jobs for those who had lost theirs during the pandemic (MTI, 2020a). In Slovakia, interest in the SAF has been at the highest level in a decade following the army's effective engagement in COVID-19 management (MOSR, 2021). At the same time, the trajectory of the region towards militarization stems from what has *not* been done. In none of the countries has the pandemic prompted systemic reforms of public services such as health care, or attempts to revive civilian-based formations of first responders such as civil defense. In fact, the concept and practice of civilian resilience is still gravely missing from discourse and policy in the region.

While the contribution of this paper is predominantly of an analytical nature, the findings suggest three theoretical arguments for further development in future scholarship. The first one relates to the neoliberal fuel for militarization, with the paper highlighting how cuts to the public sector in the region have created conditions of vulnerability that make militarist answers and solutions more appealing. The second one concerns some areas of convergence between militarization and illiberal governance in Hungary and Poland, with the article suggesting that the thus far understudied developments in the defense sector should be included in scholarly analyses of the illiberal transformation. The final argument relates to the dual nature of the process of militarization during COVID-19, with the paper observing how military permeation into the social realm has been accompanied by the civilianization of the armed forces themselves, both in terms of their discourse and roles.

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## Quoted Interviews

Interview SK1: defense expert, Slovakia, October 16, 2020.
Interview SK2: defense expert, Slovakia, November 25, 2020.
Interview HU1: defense expert, Hungary, September 16, 2020.
Interview HU2: defense expert, Hungary, November 15, 2020.
Interview HU3: former civil servant, Hungary, December 9, 2020.
Interview PL1: defense journalist, Poland, October 20, 2020.

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# The economic context of the COVID-19 pandemic in the Mediterranean countries: A comparative analysis

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## Abstract

The COVID-19 pandemic and the related political and economic crisis had serious negative effects on most Mediterranean countries. The paper aims to examine the measures introduced by the governments concerned to ease the crisis both from a quantitative and qualitative perspective. The impact of the activities of similar purpose of the institutions of the European Union are also the focus of the research, with emphasis on the state-aid framework of the European Commission aimed at supporting the economy, and the unfortunate speech of 12 March, 2020 of ECB president Christine Lagarde, which endangered the euro and caused an extreme increase in the sovereign spreads in most of the countries concerned, endangering their banking systems. The main expected results of the research are as follows. Based on the analysis of legislative measures and communications, an evaluation of the relevant actors (governments and EU institutions) will be established. This will be supplemented with the potential implications of the research for future decision-makers concerning how they can learn from how the crisis in these countries was (mis)treated.

**Keywords:** COVID-19; economic measures; Mediterranean countries; crisis

## 1. Introduction

The COVID-19 pandemic caused a crisis unprecedented in the twenty-first century. The nature of the disease made it inevitable that countries and regional integrations like the European Union would introduce serious measures in almost all fields of life, including measures restricting the free movement of people between countries and even between regions within countries, and lockdowns which led to the suspension of the normal operation of life and business.

In this article, the consequences of the aforementioned types of measures are examined in the case of seven Mediterranean countries (Croatia, France, Greece, Italy, Portugal, Slovenia, and Spain), with a focus on the economic measures and the underlying conditions that made the former necessary. These countries have much in common not only geographically but also in terms of the structure of their economies, which made their situations similar in many ways. The Mediterranean region (the cradle of modern civilization) is composed of 22 countries located around the coastal areas of the Mediterranean Sea, and covers portions of

three continents: Africa, Asia, and Europe (Molnár, 2019, p. 30). The seven countries that are examined in this article are integral parts of the continental European Union, positioned on the northern coastline of the Mediterranean Sea.

Since we are talking about seven countries which are all Member States of the European Union, and the EU took serious steps to help the former, we should mention the main points of the economic relief package generally and in the context of these countries. However, the unintentional but still harmful effects of what the EU also did in relation to the COVID-19 crisis cannot be ignored.

## 2. General overview of the Mediterranean countries during the COVID-19 outbreak

Before analysing the fiscal and economic measures implemented by national governments of the studied countries, giving a general overview of the current situation of these states is essential. This section describes the general tendencies and sheds light on the severity of the COVID-19 pandemic in the countries using different basic indicators. The data used here were accessed from open-source databases that were available online, with a focus on choosing the latest relevant data.

To have better insight into the COVID-19 pandemic, confirmed cases and cases of deaths should be further investigated (Our World in Data, 2020). Among the seven countries, the most confirmed cases of COVID-19 from a cumulative perspective as of 16 November 2020 occurred in France (2.04 million cases), followed by Spain (1.5 million cases) and Italy (1.21 million cases). However, the absolute number of cases is not the best indicator as the countries differ in terms of total population. The number of cumulative confirmed cases per million people as of 16 November 2020 demonstrates that Spain leads (32,015 cases), followed by France (30,244 cases), and then Slovenia (26,717 cases). From this perspective, Portugal is in fourth place with 22,131 cases, while Croatia is fifth with 20,831 cases. The number of deaths shows the success of the healthcare systems of the states under examination. The cumulative number of deaths as of 16 November ranks Italy in first place among the studied countries with 45,733 cases, followed by France (44,124 cases) and Spain (41,253 cases). It is better, however, to measure the number of deaths per million people for the reason indicated with respect to the number of confirmed cases. The cumulative number of deaths per one million people as of 16 November shows that Spain leads with 882 deaths, followed by Italy (756 deaths) and France (667 deaths). From these descriptive statistics we can see that the most serious situations caused by COVID-19 occurred in Spain, Italy, and France.

In order to obtain a broader comparative outlook about this region of the world, the following figures should be examined (Fig. 1.).

On the left side of the figure, the daily versus total confirmed COVID-19 cases can be found, and on the right the daily versus total confirmed deaths due to COVID-19 (Our World in Data, 2020). Studying these two figures, the date of the 'bending of the curve' and general tendencies, as well as the region's position, can be observed. It is important to note that while the Mediterranean region is among the leading countries in terms of confirmed cases, thanks to the relatively developed healthcare systems the region ranks lower in terms of the number of deaths. On the other hand, the growth of the second wave is clear on the graphs.

The severity of the health-related aspects of the pandemic is reflected in the above-listed data, the former which strongly affected the economic situation of these countries. The region's states differ based on their population size as well as the size of their national economies. The latest population data from 2019 are the following: France is the most populous
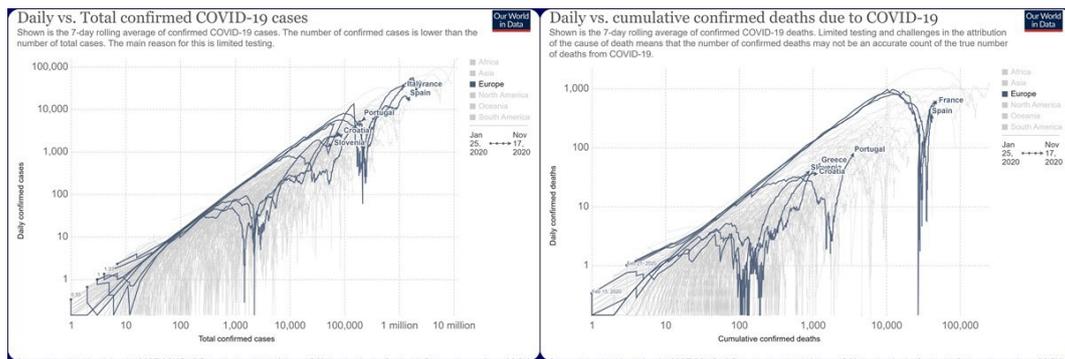
Figure 1: *Daily versus total confirmed COVID-19 cases, and daily versus total confirmed deaths due to COVID-19 (Source: Our World in Data)*

country (67.01 million people), followed by Italy (60.36 million people), Spain (46.94 million people), Greece (10.72 million people), Portugal (10.28 million people), Croatia (4.08 million people), and Slovenia (2.08 million people) (Eurostat, 2019). The size of national economies is measured by GDP, creating the following list in 2019: France was in a leading position (2425.708 billion EUR), followed by Italy (1787.664 billion EUR), Spain (1245.331 billion EUR), Portugal (212.3206 billion EUR), Greece (187.4565 billion EUR), Croatia (53.9367 billion EUR), and Slovenia (48.0066 billion EUR) (Eurostat, 2019). However, the data demonstrate a significant drop in real GDP for 2020, this being -10.8 per cent for Spain, -8.9 per cent for Italy, -8.2 per cent for Greece, -8 per cent for Croatia, -7.9 per cent for France, -7.6 per cent for Portugal, and -5.5 per cent for Slovenia (Eurostat, 2020). General government gross debt rose in every country. In this respect, Greece led with 205.6 per cent of gross debt in 2020, followed by Italy (155.8 per cent), Portugal (133.6 per cent), Spain (120 per cent), France (115.7 per cent), Croatia (88.7 per cent), and Slovenia (80.8 per cent) (AMECO, 2020). A significant decline in the import and export balance may be observed as well. With respect to the fall in imports, the leading
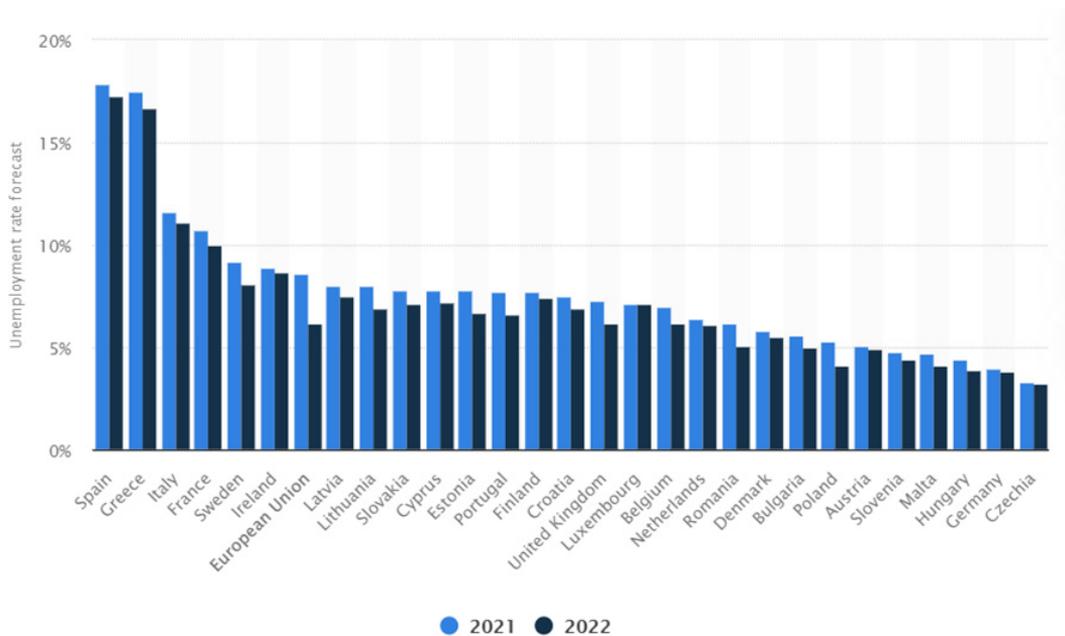


Figure 2: *Share of total unemployment by country (Source: Statista)*

countries are Spain and Greece with -23 per cent each, while concerning exports Greece faced the most extreme drop (-25 per cent) (AMECO, 2020).

Concerning the total unemployment rate for 2020, the study countries lead the list of European countries. With an extremely high 16.3 per cent Greece leads the list, followed by Spain (15.5 per cent), Italy (9.2 per cent), France (8 per cent), Croatia (7.5 per cent), Portugal (6.9 per cent), and Slovenia (5 per cent) (EUROSTAT, 2020). The unemployment rate rose quickly due to COVID-19, although most of the studied countries strengthened their job retention schemes. In April 2020, when lockdown measures to contain the spread of COVID-19 were in place in most euro area countries, 34 per cent of individuals in France, 30 per cent in Italy, and 21 per cent in Spain were engaged in short-time work (EUROSTAT, 2020). Concerning the unemployment forecast for 2021 and 2022 in Europe (Statista, 2020), the Mediterranean countries dominate the list. Spain leads with an estimated 17.9 per cent total unemployment rate for 2021, followed by Greece (17.5 per cent), Italy (11.6 per cent) and France (10.7 per cent). An exception in the region is Portugal is in twelfth place with 7.7 per cent (for reference, the average level of the European Union is 8.6 per cent; this is less than the average total unemployment expected in the Mediterranean region). For 2022 total unemployment is not expected to decrease significantly.

## 3. Methodology

The methodology used in the paper involved a mixed approach of quantitative and qualitative analyses. For the qualitative analysis, some of the policy papers and communications of the European Union or related actors were used.

For the quantitative analysis, besides the basic indicators presented in the general overview of the countries, certain databases freely available online should be mentioned. These are the COVID-19 Government Measures Dataset published by ACAPS, the Containment and Health Index published on the website of the Our World in Data, and the database of the EU Independent Fiscal Institutions along with the European Fiscal Monitor report published by the same organization in September 2020.

ACAPS's report (2020) on government maps the measures initially adopted by governments in response to the COVID-19 pandemic. The dataset registers every political measure taken, extended, or lifted in chronological order, along with the phase-out measures. The dataset is collected and uploaded in real-time by ACAPS analysts from the University of Copenhagen and University of Lund, while the scope of the dataset is global, including 192 countries. The information comes from open sources on the internet, where possible prioritizing official or governmental sources. The main taxonomy of the dataset is as follows: movement restrictions, public health measures, governance and socio-economic measures, social distancing, lockdowns. A limitation of the data is that it relies on open sources and is exposed to the various calculation methods of governments.

An aggregated index entitled the Containment and Health Index produced by the Oxford COVID-19 Government Response Tracker (OxCGRT), available on the Our World in Data website, was also involved. The index systematically collects information on several different common policy responses that governments have taken to respond to the pandemic using 18 indicators with global scope, using data from 180 countries. This includes indicators related to school closures, workplace closures, cancelling public events, restrictions on gatherings, public transport closures, public information campaigns, staying at home, restrictions on internal movement, international travel controls, testing policy, contract tracing, and face covering.

The index uses an ordinal scale that ranges between 0 and 100, where 100 indicates the strictest response policies.

The European Fiscal Monitor (2020) aims to compare fiscal responses within the scope of 24 EU Member States and the United Kingdom. It provides an overview of the economic impact, state of public finances, and fiscal measures adopted in response to COVID-19 based on volunteer cooperation on behalf of national independent fiscal institutions (IFIs). The latest report includes measures until early September 2020. Country-specific data is provided by the Fiscal Policy Commission (Croatia), the High Council of Public Finances (France), the Parliamentary Budget Office (Italy), the Fiscal Council (Greece) and the Parliamentary Budget Office (Greece), the Portuguese Public Finance Council (Portugal), the Institute of Macroeconomic Analysis and Development (Slovenia) and the Slovenian Fiscal Council, and the Independent Authority for Fiscal Responsibility (Spain).

Regarding the part of this article which examines the effects of the action taken by the EU – i.e. the measures introduced, and especially the communications of prominent leaders aimed at (or at least with the intention of) supporting the economies of the Member States and the European Union itself –, we introduce another approach; a qualitative methodology based on the concept of so-called 'soft-power'. As the creator of the aforementioned term, Nye referred to it thus in a first article: 'This second aspect of power – which occurs when one country gets other countries to want what it wants – might be called co-optive or soft power in contrast with the hard or command power of ordering others to do what it wants' (Nye, 1990, p. 166). The interpretation of hard power and soft power in case of the European Union manifests in the Normative Power Europe – Market Power Europe dichotomy. The latter refers to the importance of the Single Market as the material basis of the EU, which enables it to represent and propagate values and narratives towards other international actors as it does towards the Member States and other actors of the Single Market (Damro, 2013, pp. 682–684). Economic measures (especially incentives) and strategic communication are among the most typical soft power tools. (Nye, 2005, pp. 11–15), and so are strategic narratives (Roselle et al., 2014, pp. 70–71). From this perspective, it is of incredible and equal importance what kinds of economic measures are introduced by the EU and how the leaders of EU communicate in a crisis as deep as the Covid-19 pandemic, with its attendant consequences.

## 4. The role of national governments in alleviating the crisis

### 4.1 Types of government measures imposed in reaction to the pandemic

National governments have tried to handle the challenges generated by the worldwide pandemic. They have established crisis-response plans and implemented sets of measures to remain organized and put forward a common agenda at various levels of society. In this section, quantitative analysis is conducted on the governmental measures introduced in response to COVID-19 in the countries of the region.

In Table 1, a total of 1,367 measures are classified by their main purpose. The topology follows the classification of the ACAPS COVID-19 Government Measures Dataset. The measures are broken down into five categories. It is important to note that the different categories are of varying levels of importance in the countries' response plans. The category attracting most focus is public health measures, which is not surprising considering the severity of the COVID-19 from a health perspective, including the number of confirmed cases and number of deaths. It is also understandable that states faced and are still facing a more demanding situa-

Table 1: *Type of government measures by country (Source: authors' own table based on ACAPS data)*

| Type of government measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Governance and socioeconomic measures | 14 | 51 | 9 | 37 | 76 | 23 | 31 | 241 |
| Lockdown | 2 | 5 | 14 | 10 | 3 | 1 | 12 | 47 |
| Movement restrictions | 20 | 21 | 60 | 30 | 40 | 21 | 19 | 211 |
| Public health measures | 51 | 61 | 61 | 71 | 86 | 46 | 95 | 471 |
| Social distancing | 69 | 43 | 74 | 42 | 89 | 21 | 59 | 397 |
| Total | 156 | 181 | 218 | 190 | 294 | 112 | 216 | 1367 |

tion than ever in terms of challenges to healthcare systems and public attention to the health issues associated with the pandemic. The second category in terms of related measures related is social distancing, while the third is governance and socioeconomic measures. The two smallest categories from this perspective are movement-related restrictions and lockdowns.

Among the countries, Portugal is in leading position in terms of the number of measures that have been introduced. It is followed by Greece, Spain, Italy, France, Croatia, and finally, Slovenia. The country focus varies between the categories as well. Public health measures are at the forefront in France, Italy, Slovenia, and Spain, which three countries were heavily hit in terms of the number of both confirmed cases and deaths due to COVID-19. Social distancing is the cluster that most measures are associated with in Croatia, Greece, and Portugal.

Table 2: *Type of governance and socioeconomic measures by country*
*(Source: authors' own table based on ACAPS data)*

| Type of governance and socioeconomic measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Economic measures | 13 | 36 | 8 | 23 | 59 | 14 | 23 | 176 |
| Emergency administrative structures activated or established | 1 | 8 | 1 | 4 | 7 | 7 | 2 | 30 |
| Limit product imports/exports | | 1 | | 1 | | | | 2 |
| Military deployment | | 2 | | 7 | 1 | | 3 | 13 |
| State of emergency declared | | 4 | | 2 | 9 | 2 | 3 | 20 |
| Total | 14 | 51 | 9 | 37 | 76 | 23 | 31 | 241 |

As the paper has a strong focus on economic measures, it is worth analysing the governance and socioeconomic measures in detail in terms of their content. The ACAPS COVID-19 Government Measures Database breaks down these types of measures into five sub-categories.

A total of 241 measures have been introduced in the field of socioeconomic measures. Among the sub-categories, the dominance of economic measures may be observed (176 measures). This is followed by emergency administrative measures (30), state-of-emergency declarations (20), and military deployments (13). Economic measures have been at the forefront in every country and are clearly dominant. On the other hand, for the second most active category we see a variety of sub-clusters. Strong accent is placed on emergency administrative measures in Croatia, France, Portugal, and Slovenia, while military employment plays a significant role in Italy and Spain. These countries have used their military power to guarantee

## COVID-19: Containment and Health Index

This is a composite measure based on thirteen policy response indicators including school closures, workplace closures, travel bans, testing policy, contact tracing, face coverings, and vaccine policy rescaled to a value from 0 to 100 (100 = strictest). If policies vary at the subnational level, the index is shown as the response level of the strictest sub-region.
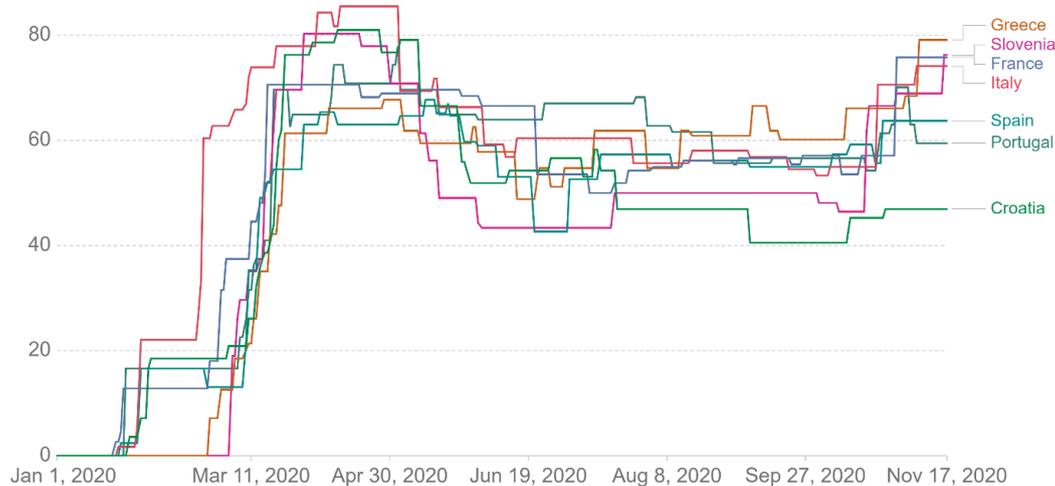


Source: Hale, Angrist, Goldszmidt, Kira, Petherick, Phillips, Webster, Cameron-Blake, Hallas, Majumdar, and Tatlow (2021). "A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker)." Nature Human Behaviour. – Last updated 13 June, 06:17 (London time)
OurWorldInData.org/coronavirus • CC BY

Figure 3: *Containment and Health Index during the COVID-19 pandemic (Source: Our World in Data)*

public order; what is more, military personnel are involved in testing procedures and supervising social distancing.

The Containment and Health Index chart (Our World in Data, 2020) reveals the variety of response strategies of the countries. To better interpret the data, it is important to note the date of the first confirmed case of COVID-19 in the sample countries. The pandemic appeared first in France on 24 January 2020, then in Spain (31 January), Italy (31 January), Croatia (25 February), Greece (26 February), Portugal (2 March), and finally in Slovenia (4 March). Based on their response strategy as measured by the index, Italy (2.08) and Spain (2.70) introduced measures at the beginning very smoothly. The response was harsher in Croatia (4.17), France (6.25), Greece (8.33), Portugal (19.44) and harshest in Slovenia (22.22). It was also strict in Portugal (19.44). Measures were introduced before the first confirmed case was declared in five of the examined countries. In Portugal and Croatia, this happened more than a month before; and in Italy and Spain one week before the first confirmed case. These preventive actions delayed the appearance of the first COVID-19-related case in these countries, especially in Portugal, where due to the strict measures COVID-19 appeared only in March 2020.

The response measures reached their peak in terms of stringency in various periods. Countries can be divided into two categories with respect to the peak period; namely, countries implementing their strictest measures in spring, or in autumn (as of 17 November 2020). Highest on the stringency scale is Italy, with a value of 91.32 between 12 April and 3 May 2020. Other countries that reached a high point in spring are Croatia with 86.11 points between 2 April and 26 April, Slovenia with 85.42 points between 30 March and 19 April, Portugal with 82.64 points on 3 May, and Spain with 76.39 points between 13 May and 16 May. Greece reached a peak between 7 November and 15 November (84.03), just like France between 30

October and 15 November (82.99). It is also interesting to highlight that while Italy had the highest scores, Spain peaked at 76.39 points. The general tendency was for an easing of measures during the summer in every country, followed by stricter limitations from October again. The worsening conditions due to COVID-19 are often referred to as the second wave of the pandemic.

### 4.2 The common challenges of the Mediterranean economies

In general, all national economies were hit hard by the coronavirus. In the European Union, the situation was somewhat special, since the free movement of workers (and, in general, the free movement of EU citizens), which is one of the four freedoms of the EU Single Market, is essential from the perspective of certain sectors of the economy of the Member States. Although almost all sectors were hit, two of them are extremely exposed to the free movement: these were tourism and, somewhat surprisingly, agriculture. Since free movement was limited by the travel bans and lockdowns of the Member States, negative consequences were inevitable.

*Tourism* is a large sector in the economy of the European Union in general. According to Eurostat, in 2016 every tenth enterprise (2.4 million) was operating in this sector, employing 9.5 per cent of the EU workforce (13.6 million workers) (Williams, 2021, p. 80). Most of the seven countries we examined suffered from the exposure of their national economies to the tourism sector.
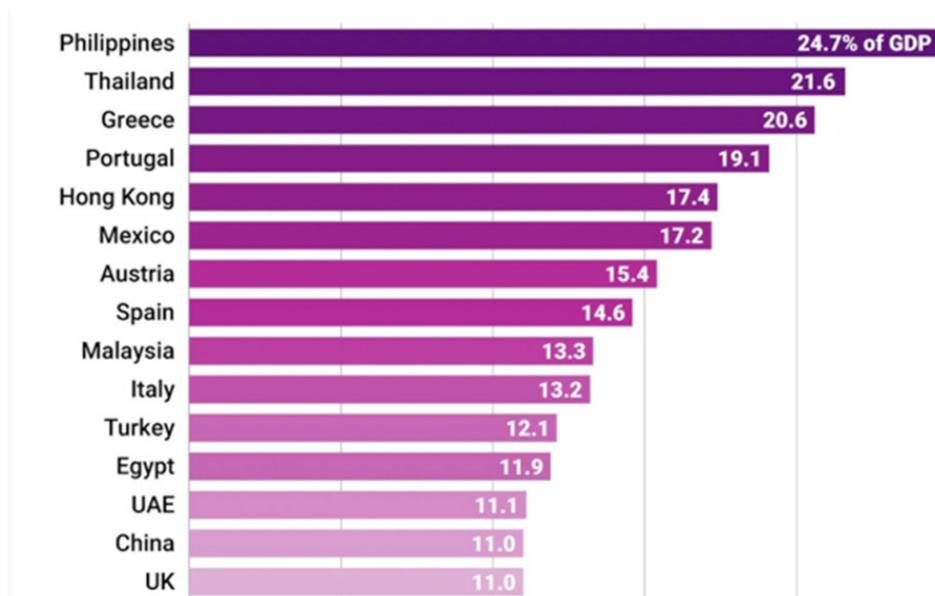


Figure 4: *List of countries most dependent on tourism (Source: World Travel and Tourism Council Data (2018) and World Bank (2018), quoted by Debinski and Turrisi, 2020)*

According to an analysis carried out in May 2020, all the countries – except for France – are ranked in the top 10 countries from the 50 largest economies globally that depend most on tourism as a proportion of GDP. Greece and Portugal are third and fourth, Spain is eighth

and Italy is tenth (Debinski & Turrisi, 2020). Also, Croatia and Slovenia depend a great deal on tourism, with approximately 10 per cent of GDP added by the tourism sector in both countries (Kovačević, 2020; Cvelbar & Ogorevc, 2020).

Perhaps the biggest related problem here – besides the direct effects of coronavirus – is the so-called undeclared economy and undeclared workers. Using a cross-sectoral approach it is estimated that undeclared workers constitute 11.9 per cent of the EU workforce, and the undeclared economy is responsible for 15.8 per cent of the GDP of the EU. Naturally, undeclared enterprises and firms operating with undeclared workers cannot benefit from programmes such as the Support to mitigate Unemployment Risks in Emergency (SURE), which was supported by the European Commission to the sum of 100 billion euros (Williams, 2021).

*Agriculture* is exposed to travel bans, restrictions, and lockdowns, since the movement of temporary labour, which is essential to this sector, almost always comes from foreign, poorer countries, or at least from other regions of the same country (Cortignani et al., 2020, p. 172). Even the agriculture of Germany depends on no less than 300,000 mainly Eastern-European seasonal workers at time of harvest. Therefore, it is not surprising that amid the first wave of the coronavirus in April 2020 the latter country sent planes to Romania to bring in workers in a safe way (Hurst, 2020).

Regarding the Mediterranean countries, Spain suffered such a shortage of agricultural workforce that 80,000 immigrants were recruited to support the sector. Spanish agriculture traditionally depends on migrants from Latin America and Africa. At the same time, Portugal regularized immigrants with pending residence permits (Cortignani et al., 2020, pp. 172–174). In Italy, temporary workers also support many farming activities; the former are mainly young immigrants engaged in working relationships characterized by extreme flexibility. Amid the restrictions, types of farms that heavily depend on temporary labour for certain crop operations, especially harvesting, faced appreciable decreases in income. Types of farms that operate with a lower level of profitability were also notably endangered, with serious implications for the social and environmental balance of the marginal areas in which they operate (Cortignani et al., 2020). The problems with the latter model are constant regardless of whether crises occur, although the Covid-19 crisis amplified the negative effects of these dysfunctionalities.

*4.3 Fiscal measures in the crisis management of the Mediterranean countries*

The EU Independent Fiscal Institutions database lists the measures countries have introduced to manage the crisis generated by the pandemic in the field of fiscal measures and policies. First, a quantitative overview of the measures is presented to create better insight into the type, duration, and policy objectives of these initiatives.

In Table 3, a total of 127 financial measures that were involved are broken down by type. These can be divided into six clusters. Based on the number of measures that were implemented, the 'expense' cluster was most numerous (52), followed by 'tax relief' (26), 'guarantee' (16) and 'loan' (15). Another 16 measures are 'other' types. Among the countries we examined, Spain introduced the highest number of such measures (59), followed by Greece (17) and Slovenia (17), Italy (13), Portugal (8), Croatia (7), and France (6). The national focus was on the category of 'expense' in France, Greece, Slovenia and Spain. Besides these countries, the expense category was also one of the leading ones in the remaining states, although in Italy 'guarantee'-type measures, while in Portugal 'loan' and 'tax-relief' types of measures were equally prominent. As an exception, we can see that regarding the number of measures Croatia paid attention to loans and tax relief (Table 4).

Table 3: *Types of financial measures by country (Source: authors' own table based on IFIs data)*

| Types of financial measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Expense | 1 | 3 | 9 | 4 | 2 | 12 | 21 | 52 |
| Guarantee | 1 | 1 | 3 | 4 | 1 | 2 | 4 | 16 |
| Investment | | | | 2 | | | | 2 |
| Loan | 2 | 1 | 2 | | 2 | | 8 | 15 |
| Tax relief | 2 | 1 | 3 | 3 | 2 | 3 | 12 | 26 |
| Other | 1 | | | | | 1 | 14 | 16 |
| Total | 7 | 6 | 17 | 13 | 8 | 17 | 59 | 127 |

Table 4: *Types of other financial measures by country (Source: authors' own table based on IFIs data)*

| Types of other measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Other categories | 6 | 6 | 17 | 11 | 8 | 17 | 39 | 104 |
| Loan moratorium | 1 | | | | | | | 1 |
| Regulatory measure | | | | | | | 15 | 15 |
| Suspension | | | | | | | 5 | 5 |
| Tax relief and transfers | | | | 2 | | | | 2 |
| Total | 7 | 6 | 17 | 13 | 8 | 17 | 59 | 127 |

The category of 'other' types of financial measures can be further divided into regulatory measures, suspensions, tax relief and transfers, loan moratoriums, and others. Among these sub-clusters, regulatory measures were the most numerous, including 15 measures. 'Other' types of measures include a total of eight measures, but only Croatia (1), Italy (2) and Spain (20) introduced them. In Spain, regulatory measures are clearly dominant with 15 such measures being used during the phase of crisis management. Different types of other measures are included in the 'other' sub-cluster of categories, accounting for a total of 104 measures in the seven countries.

Table 5 shows the duration of the measures. The classification identifies measures ranging from those restricted only to the crisis period to long-term measures with longer-than-five-year timeframes. Most of the measures, due to the specific emergency situations, focus on the crisis period (60), but a significant number of them are intended for the short-term period, lasting up to one year (47). Furthermore, seven measures have been introduced for the medium-term, one for the longer-term, and twelve have no definitive end date. Studying the duration from a national perspective, the preference is clearly for measures that extend for the crisis period and induce short-term resilience. Croatia (4), Greece (9), Portugal (6), and Slovenia (13) focus on the crisis period, while France (4), Italy (7), and Spain (25) defined a number of initiatives effective in the short term for up to one year (Table 6).

Financial measures serve various policy objectives, such as immediate crisis-response, economic recovery, adaptation to the new normal, and other objectives. Most measures are devoted to immediate crisis-response purposes (85), while those that promote economic recovery come in second place (22), followed by adaptation to the new normal (12), and other (8). From the perspective of countries, there is consensus about the need to allocate resources

Table 5: *Duration of financial measures by country (Source: authors' own table based on IFIs data)*

| Duration of the measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Crisis period | 4 | 1 | 9 | 4 | 6 | 13 | 23 | 60 |
| Long term (more than 5 years) | | | 1 | | | | | 1 |
| Medium term (up to 5 years) | | | 2 | 2 | 2 | | 1 | 7 |
| Open-ended | | 1 | 1 | | | | 10 | 12 |
| Short term (up to 1 year) | 3 | 4 | 4 | 7 | | 4 | 25 | 47 |
| Total | 7 | 6 | 17 | 13 | 8 | 17 | 59 | 127 |

Table 6 *Policy objective of financial measures by country (Source: authors' own table based on IFIs data)*

| Policy objective of the measures | Croatia | France | Greece | Italy | Portugal | Slovenia | Spain | Total |
|---|---|---|---|---|---|---|---|---|
| Economic recovery | | | 3 | 3 | | | 16 | 22 |
| Immediate crisis-response | 3 | 6 | 11 | 8 | 7 | 12 | 38 | 85 |
| Transition to the new-normal | | | 2 | 2 | | 3 | 5 | 12 |
| Other | 4 | | 1 | | 1 | 2 | | 8 |
| Total | 7 | 6 | 17 | 13 | 8 | 17 | 59 | 127 |

to immediate crisis-response measures, while other policy objectives are in the forefront in Croatia (4).

Turning to the budgetary perspective regarding the above-analysed fiscal measures, clear country profiles can be drawn. It is important to note, however, what the EU averages are. Concerning discretionary measures, the EU average spend on the latter was 6.4 per cent of GDP, while for liquidity measures the EU average was 11.7 per cent (European Fiscal Monitor, 2020).

According to the EUFIS report issued in September 2020, Croatia dedicated 2.5 per cent (of GDP) to discretionary measures, and 6.1 per cent (of GDP) on liquidity measures. The spending of both countries remained, however, below the EU average. A focus was placed on tax deferrals, costing 2.1 per cent of GDP, followed by employment support equivalent to 1.8 per cent of GDP, and loans also at 1.8 per cent of GDP (European Fiscal Monitor, 2020).

The role of France as a leading power in the region is undoubted. The High Council of Public Finances dedicated 2.3 per cent (of GDP) to discretionary measures, and a much higher 16.7 per cent (of GDP) on liquidity measures. Credit guarantees are at the forefront with 13 per cent of GDP, followed by employment-support measures accounting for 1.4 per cent of GDP. In connection with this, two measures should be emphasized. France extended the short-term unemployment benefits that were designed to help avoid the negative effects of unemployment and to compensate for revenue losses. The measure was introduced on 17 March as an immediate crisis-response tool with expected funds equivalent to 1.20 per cent of GDP. Another significant measure in France entered into force on 18 March for the short-term – maintaining firms' access to credit. The decision involved Bpifrance guaranteeing on behalf of the state loans granted to non-financial firms to a total of 300 billion euros, up to 25 per cent of the latter's turnover (European Fiscal Monitor, 2020).

Greece implemented both discretionary (4.2 per cent) and liquidity (3.3 per cent) measures at a lower level. The main financial measures were issuing loans (1.8 per cent of GDP) and providing income support (1.6 per cent of GDP), while forms of tax relief (1.3 per cent of GDP) and credit guarantees (1.1 per cent of GDP) were significant contributory types of measures

as well. In Greece, two measures were highly significant. One of them was a lump-sum cash benefit of 800 euros and coverage of social security contributions, which were aimed at compensating for revenue losses and mitigating demand-shock during the crisis-period (2.08 per cent of GDP). The other measure was a tax refund in advance (of the previous year's advance tax payment) to businesses, which served as a form of liquidity support primarily to assist in the transition to the new normal (1.12 per cent of GDP) (European Fiscal Monitor, 2020).

Italy's main fiscal measures were centred on state guarantees provided through SACE that supported liquidity and helped avoid unemployment as an immediate crisis response. Grants to the value of 200 billion euros were made to banks, enabling them to grant further loans (22.05 per cent of GDP). In addition to this, the state strengthened public support for exports through a co-insurance system involving 90 per cent insurance coverage funded by SACE. Another measure was designed to support any person dealing with the economic and social costs of the emergency: over 25 billion euros were allocated to support employment and guarantee income and decent living conditions by the Wage Guarantee Fund (1.49 per cent of GDP). Besides this, four billion euros were allocated to cover cancelling the advance payment of taxes by businesses – a measure designed to support liquidity (1.20 per cent of GDP).

Portugal placed liquidity measures at the forefront using 9.6 per cent of GDP, while the value of discretionary measures remained at 3.7 per cent. Among the fiscal measures, credit guarantees lead with 9.2 per cent of GDP, followed by income support with 1.5 per cent. The main fiscal measures from a budgetary perspective served the purpose of compensating for revenue losses and mitigating demand-shock, while supporting cash-flow management was also considered important. The postponement of VAT payments and withholding some other taxes addressed companies, supplemented by another measure in the form of treasury-guaranteed loans to support the economic activity of companies with cash-flow difficulties. This latter measure was implemented using a 13-billion-euro scheme approved by the European Commission to support the Portuguese economy related to the COVID-19 outbreak. A credit moratorium was also introduced for private mortgages and SMEs (European Fiscal Monitor, 2020).

Spain introduced a high level of liquidity measures (14.8 per cent of GDP) and discretionary measures (5.1 per cent of GDP). The main type of measures were credit guarantees (11.7 per cent of GDP) and employment support (2 per cent of GDP). The state provided an unemployment subsidy to employees who had been temporarily laid-off due to the pandemic (1.24 per cent of GDP). For companies affected by the virus, the state guaranteed extra bank loans to an expected value of 8.81 per cent of GDP (European Fiscal Monitor, 2020).

Slovenia introduced discretionary measures in proportions near the EU average, valued at 5.8 per cent (of GDP), while the scale of liquidity measures remained below the EU average at 7.2 per cent (of GDP). The dominance of credit guarantees can be observed in the share of 6.4 per cent of GDP dedicated to this form of support, followed by employment support worth 2.8 per cent of GDP and income support at 1.6 per cent of GDP (European Fiscal Monitor, 2020).

## 4.4 The most important measures introduced by the national governments

All seven countries we examined introduced significant measures to alleviate the crisis and to help the economy and its actors to recover and/or boost their performance despite the unfortunate conditions.

In the field of *taxation*, the new measures were aimed at easing reporting and payment obligations. The following collection of measures only exemplifies the most important measures in each country. In Spain, there was a general suspension of tax periods and deadline

extensions in many cases. During certain intervals (e.g. between 18 March 2020 and 30 April, 2020), tax-related enforcement operations against real-estate assets undergoing administrative collection proceedings were suspended. Corporate Income Tax- (CIT), Personal Income Tax- (PIT), and Value Added Tax- (VAT) related obligations were also eased (KPMG, 2020e). The tax regime in Portugal was amended in a way that the first instalments of payments of several taxes for 2020 were postponed, and significant amendments were enacted regarding the VAT system (KPMG, 2020d). In Italy, several decrees included measures intended to assist businesses by providing loan guarantees, the government assumption of non-market risks, and some forms of targeted tax relief. Many tax suspensions and deferrals were enacted, including the suspension of tax audits (KPMG, 2020c). In Greece, a list of affected enterprises (mainly in the sector of tourism, air and sea transportation, sports centres, gymnasiums, etc.) was introduced; the former were granted an exemption from paying 40 per cent of their rental cost for commercial premises for the months of July and August 2020 (KPMG, 2020b). In France, any company in difficulty as a result of the health crisis could postpone, without penalty, the payment of direct taxes due in March, April, May, and June 2020. Many other deferrals and new rules concerning settlement plans for tax payments were introduced (KPMG, 2020a). In Croatia, facilitatory measures were introduced in the fields of certain taxes (VAT for import goods to be shown as liabilities, vaccination for employees as form of non-taxable remuneration, etc.) and several opportunities for deferrals also became available within the tax system (KPMG, 2020f). In Slovenia, a so-called 'Corona Mega Package' came into force within a very short period of time after the outbreak of the coronavirus, which also made tax deferral possible and introduced other types of easing measures, with very similar priorities and characteristics to those in Croatia (KPMG, 2020g).

In the field of *employment and social security contributions*, the new measures generally aimed to enhance the social security and health and well-being of the workforce. For instance, in Greece, employers' right to unilaterally impose remote working was extended to 31 December 2020. In France, the exceptional bonus paid in 2020 to civil servants was exempted from income tax and social security contributions. The authors would like to highlight the job preservation measures of Croatia, which involved a generous system of grants to a wide spectrum of applicants across the whole national economy. *Legal-related measures* addressed issues such as the adjustment of rules of general assemblies to the coronavirus situation. In most of the sample countries, *economic stimulus measures* were also introduced to boost the economy. Slovenia decided to allocate one billion euros from only Slovenian sources to compensate for damage to the tourism- and export-oriented economy due to travel restrictions and lockdowns (KPMG, 2020a; KPMG, 2020b; KPMG, 2020c; KPMG, 2020d; KPMG, 2020e; KPMG, 2020f; KPMG, 2020g).

## 5. The role of the European Union in the easing and escalation of the crisis

*5.1 The impact of the COVID-19 crisis on the EU economy*

The European Commission, in one of its earliest communications on the subject – namely, the one of 13 March 2020 – defined the problem as follows.

> COVID-19, commonly known as the coronavirus, is a severe public health emergency for citizens, societies and economies. Having spread from China, the pandemic has now provoked infections in all Member States. While Italy is the most strongly affected, the number of cases is increasing
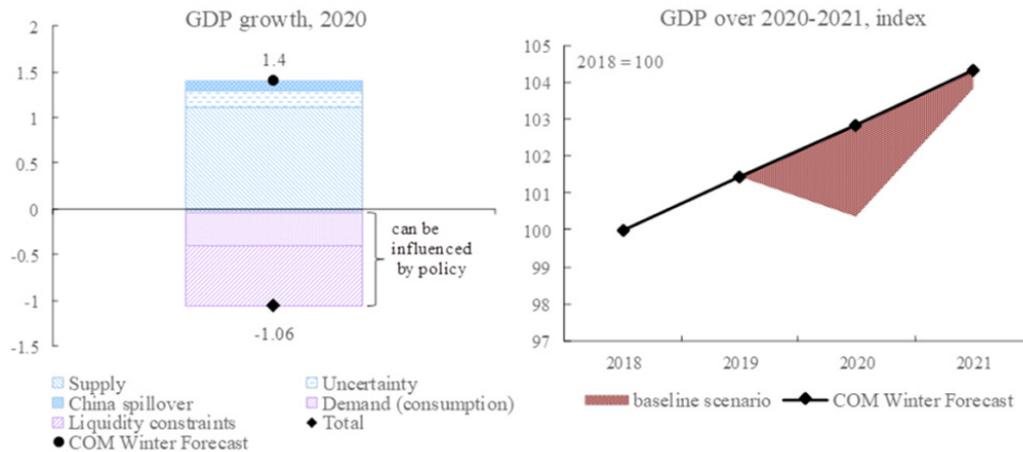
Figure 5: *Estimated impact of COVID-19 on European economies in 2020 (Source: European Commission, 2020b, p. 2)*

across Member States and the situation is evolving quickly. The pandemic is imposing a heavy burden on individuals and societies and putting health care systems under severe strain. We must respond together to slow down the contagion, strengthen [the] resilience of our health care systems to help those in need and [make] progress in research and development. (European Commission, 2020a, p. 1)

The abovementioned document is structured as follows, highlighting the following areas of concern in relation to which the intervention of the European Union is deemed necessary and intended.

- Socioeconomic consequences.
- Ensuring solidarity in the Single Market:
    - Supply of medical equipment;
    - Transport;
    - Tourism.
- Mobilising the EU budget and the European Investment Bank Group:
    - Liquidity measures: support for firms, sectors, and regions;
    - Alleviating the impact on employment;
- The Coronavirus Response Investment Initiative (CRII).
- State aid
- Using the full flexibility of the European Fiscal Framework.

(European Commission, 2020a)

The Annexes to the document emphasize the necessity of a common approach by Member States to combat the coronavirus crisis and its impacts, among other areas (European Commission, 2020b, pp. 3–4).

As mentioned in the Methodology chapter, the following analysis about the response of the European Union to the coronavirus, including the supporting measures and strategic communications, should be interpreted such that that these instruments are all manifestations of EU soft power, or in other words, Market Power Europe.

## 5.2 Measures introduced to enable support-related state aid

The competition law regime of the European Union is very strict, including the rules related to applying for the state aid provided by Member States. The purpose of state-aid rules is to free the Single Market from protectionism, and by this means enhance fair competition.

In accordance with Art. 107 (1) of the Treaty on the Functioning of the European Union (TFEU): 'Save as otherwise provided in the Treaties, any aid granted by a Member State or through State resources in any form whatsoever which distorts or threatens to distort competition by favouring certain undertakings or the production of certain goods shall, in so far as it affects trade between Member States, be incompatible with the internal market.' Paras (2) and (3) of Art. 107 list those cases in which state aid *shall be* or *may be* compatible with the internal market.

Pursuant to the coronavirus crisis, this field also required some new measures. As set out in a communication by the European Commission: 'The Commission also stepped up to make the EU budget more readily available, to make our State aid rules fully flexible and to trigger the Stability and Growth Pact's General Escape Clause for the first time ever. Along with measures taken by the European Central Bank, this EU response gives Member States unprecedented fiscal and financial firepower to help those that need it the most' (European Commission, 2020c, p. 1).

The most important amendments – not amendments of the Treaty on the Functioning of the EU (TFEU) of course, but new interpretations by the Commission, partially through the Rescue and Restructuring State Aid Guidelines – are as follows.

'In the overall effort of Member States to tackle the effects of the COVID-19 outbreak on their economies, this Communication sets out the possibilities Member States have under EU rules to ensure liquidity and access to finance for undertakings, especially SMEs that face a sudden shortage in this period in order to allow them to recover from the current situation. Member States may also design support measures in line with Block Exemption Regulations8 without the involvement of the Commission' (European Commission, 2020d, pp. 3–4).

On the basis of Art. 107 (2) (b) TFEU ('The following shall be compatible with the internal market: aid to make good the damage caused by natural disasters or exceptional occurrences'), 'Member States can also compensate undertakings in sectors that have been particularly hit by the outbreak (e.g. transport, tourism, culture, hospitality, and retail) and/or the organisers of cancelled events for damages suffered due to and directly caused by the outbreak' (European Commission, 2020d, pp. 4–5).

On the basis of Art. 107 (3) (c) TFEU ('The following may be considered to be compatible with the internal market: aid to facilitate the development of certain economic activities or of certain economic areas, where such aid does not adversely affect trading conditions to an extent contrary to the common interest') and as further specified in the Rescue and Restructuring State aid Guidelines, 'Member States can notify to the Commission aid schemes to meet acute liquidity needs and support undertakings facing financial difficulties, also due to or aggravated by the COVID-19 outbreak' (European Commission, 2020d, p. 4).

Art. 107 (3) (b) TFEU ('The following may be considered to be compatible with the internal market: aid to promote the execution of an important project of common European interest or to remedy a serious disturbance in the economy of a Member State') shall be interpreted in a way which enables Member States to provide temporary state aid in line with a sets of additional requirements. (It is to be noted that the requirements slightly differ in case of primary agriculture, fisheries, and the aquaculture sector.) Several different forms of state aid are

specified as permissible according to the exception listed above, such as public guarantees on loans; aid for COVID-19 relevant research and development; and wage subsidies for employees to avoid lay-offs during the COVID-19 outbreak (for a detailed description see European Commission, 2020d, pp. 5–32).

### 5.3 The Recovery Plan for Europe and the Coronavirus Response Investment Initiative

'To help repair the economic and social damage caused by the coronavirus pandemic, the European Commission, the European Parliament, and EU leaders have agreed on a Recovery Plan that will lead the way out of the crisis and lay the foundations for a modern and more sustainable Europe. A total of €1.8 trillion will help rebuild a post-COVID-19 Europe, which is greener, more digital, and more resilient. On 10 November 2020, an agreement was reached between the European Parliament and EU countries in the Council on the next long-term EU budget and NextGenerationEU. This agreement will reinforce specific programmes under the long-term budget for 2021-2027 by a total of €15 billion' (European Commission, 2020e).

The Coronavirus Response Investment Initiative (CRII) was initiated at the very beginning of the crisis; it is mentioned in the Commission's communication of 13 March, 2020, along with other fiscal proposals, such as the extension of the scope of the EU Solidarity Fund, and the mobilisation of the European Globalisation Adjustment Fund (European Commission, 2020a, pp. 7–8). Within the framework of cohesion policy, CRII and CRII+, along with the REACT-EU package, was implemented, and several Member States received support through these (European Commission, 2020f).

Regarding the Mediterranean countries we examined, 30 million euros from the European Regional Development Fund (ERDF) were redirected to help two Italian regions, Emilia Romagna and Tuscany, with the coronavirus crisis. The two regions are the first to take advantage of the flexibilities provided under the CRII. In France, the European Regional Development Fund supported the purchase of equipment for health infrastructure (masks and respirators) and provided economic support to SMEs. Furthermore, the European Commission has approved the modification of thirteen 2014–2020 Regional Operational Programmes and two national Operational Programmes in Greece. These modifications make €1.14 billion available to address the effects of the coronavirus crisis in the Greek economy through the funding of initiatives for supporting entrepreneurship (European Commission, 2020f).

### 5.4 The communication failure of Christine Lagarde

When it comes to handling crises, strategic communication is a key feature of the crisis management toolbox of the European Central Bank (ECB), and since the so-called *'bazooka speech'* of former ECB president Mario Draghi, we know that a powerful statement from a charismatic leader can influence the financial markets to a greater degree than previously expected.

The most influential speech that Mario Draghi ever gave was a speech on 26 July, 2012 (the *'bazooka speech'),* which according to many stopped in its track the euro crisis that had been raging for three years. He said: 'Within our mandate, the ECB is ready to do whatever it takes to preserve the euro. And believe me, it will be enough'. Until that time, the ECB was focusing on price stability, but with this sentence the ECB put itself in the shoes of a powerful actor. The remarkable thing is that it seems to have worked (Verdun, 2017, p. 215).

In the case of the COVID-19 crisis, on 3 March, 2020 (at the very beginning of the escalation of the crisis in Europe), a significant speech was given by the ECB president Christine
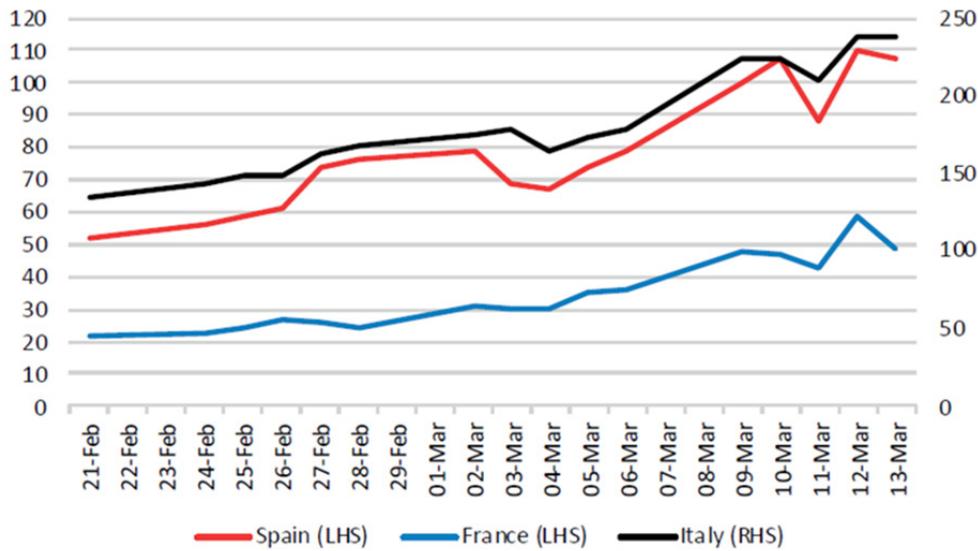
Figure 6: S*overeign spreads in Spain, France, and Italy (Source: Panizza, 2020 based on ECB online data)*

Lagarde, which is now called the *'anti-bazooka speech'*, as its impact was of almost the same magnitude as the abovementioned speech of Draghi, only in completely the reverse direction, especially as regards the Mediterranean countries. Several authors argue that the ECB president did great harm to this group of EU Member States, which could have been even worse if certain other EU actors had not managed to calm the markets (Fig. 6).

In her speech, Lagarde made it plain that was not the duty of the ECB to ease Italy's financial troubles: 'There are other tools and other actors to deal with these issues'. Rapid financial market breakdown followed. The President of the EU Commission, Ursula von der Leyen, tried to make amends by affirming that the EU was ready to help Italy as much as possible (Raffaetà, 2020, p. 2). Beside Italy, Spain and France also found themselves in a difficult situation, as Lagarde said that 'the ECB is not here to close [sovereign] spreads'. The Italian sovereign spread grew by nearly 100 basis points after the virus outbreak and reacted badly to Lagarde's aforementioned comment. The outbreak of the virus and Lagarde's comments were also followed by an increase in the Spanish and French sovereign spreads (Panizza, 2020, p. 259). In Italy, the position of the traditionally undercapitalised and therefore vulnerable Italian banking system also deteriorated because of the increase in the sovereign spread (Panizza, 2020, p. 259).

The opposite message to markets would have been required from euro area policymakers, who should have made it clear that the ECB would provide unlimited liquidity to governments under temporary financial stress, emphasizing that: 1) the European Stability Mechanism (ESM), the euro area's bail-out fund, would be open to all Member States, and that, 2) the ECB was ready to use its Outright Monetary Transactions (OMT) programme of unlimited government bond purchases if a government needed it (Odendahl & Springford, 2020, pp. 148–149).

The day was saved, on the one hand, by the president of the European Commission, and on the other by a blog entry by the ECB's chief economist Philip Lane, while Lagarde also corrected herself in a subsequent interview (Beck, 2020, p. 181). However, at the end of the day, the conclusion still remains that Lagarde is not as competent as someone in her position should be, especially in comparison with von der Leyen (Garicano, 2020; Alesina & Giavazzi, 2020).

## 6. Conclusions

The first conclusion to be drawn is the severity of the COVID-19 pandemic in terms of impacts on the health, economy, and politics of the Mediterranean countries. The region's states have been hit hard by the pandemic, and are among the states most affected by the economic crisis as well. The paper investigated the economic resilience of Croatia, France, Italy, Greece, Portugal, Slovenia, and Spain both from a quantitative and qualitative perspective.

A great share of the GDP of these countries is generated by tourism, thus travel restrictions and bans and lockdowns caused great damage. From the perspective of agriculture, seasonal workers are essential; consequently, the aforementioned restrictions hit that sector hard as well. For these reasons, the examined countries are greatly exposed to any restrictions on the free movement of people. The respective governments tried to introduce inventive ways to ensure the necessary workforce.

Government measures show different response strategies based on the Containment and Health Index. Based on the stringency of introductory measures, the harshest preventive responses were implemented by Slovenia and Portugal, and these contributed to the delay in the first confirmed case of COVID-19 in these countries. With respect to the strictest measures overall, Italy had the highest value on the index. Measures were introduced a month before the first confirmed case in Portugal and Croatia, and in Italy and in Spain a week before. Looking at the level of stringency, Croatia, Italy, Portugal, Slovenia, and Spain reached a peak in spring 2020 (as of November 2020), while France and Greece introduced stricter measures in Autumn 2020.

Results demonstrate that governance and socio-economic measures have been among the leading measures, besides public health and social-distancing measures. Public health measures have been at the forefront due to the extremely high number of confirmed cases and deaths due to COVID-19, including in France, Italy, Slovenia, and Spain, while Croatia, Greece, and Portugal emphasized social distancing to keep the number of cases as low as possible. Among the economic measures, emergency administrative measures dominate the response plans of the cluster of Croatia, France, Slovenia, and Portugal, while military deployment occurred in Italy and Spain. Turning to fiscal measures, a clear emphasis on assistance with expenses is found in France, Greece, Slovenia, and Spain, while guarantee-type measures were implemented mostly in Italy, and loans and tax relief in Portugal and Croatia. Based on the duration of the measures, the countries we examined have been forced to focus on immediate and short-term resilience – especially Greece, which has been facing economic crises for years. States mainly focused on measures for supporting liquidity. In alignment with this, resources have been allocated for immediate crisis-response measures, while economic recovery is stressed in Spain.

The European Union acted relatively quickly, as is demonstrated by the communications it has issued since the earliest phase of the European pandemic in around March 2020. The economic relief packages that were introduced were composed of measures of a fiscal nature, ranging from virtual financial help to the easing of the otherwise strict state-aid rules associated with EU law. As may be seen now, these measures have generally been successful, and in the seven countries contributed to damage control. However, the speech of ECB president Christine Lagarde of 12 March, 2020 was not a success story at all. Her careless choice of words and poor messaging caused the sovereign spreads of France, Italy and Spain to rise immediately, and in Italy, where the banking system is traditionally undercapitalized, other problems occurred as well. Fortunately, these effects were mitigated within days by correcting remarks.

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Bori Simonovits, Boglárka Zách & Csenge Kondorosy

# Participation, trust, and risks associated with peer-to-peer accommodation platforms: How did the COVID-19 crisis affect Airbnb Budapest in 2020?

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## Abstract

Our research was aimed at exploring the different layers of trust with regard to Airbnb services, as well as the practices of discrimination on the platform. The fieldwork was carried out in the first half of 2020, partly before and partly after the COVID-19 related interventions, which significantly affected life in Budapest from mid-March 2020 onwards. A total of 21 semi-structured interviews were carried out, supplemented with online discourse analysis.

Our empirical analysis revealed that most of our interviewees displayed positive attitudes towards Airbnb, but our online discourse analysis showed that there are rather mixed attitudes towards the company. Considering the platform from an employment perspective, certain elements of precarious working conditions were identified. When it comes to different layers of trust, we point out that interpersonal trust between guests and hosts is crucial, resulting in positive experiences for hosts in many ways. We found social trust in Airbnb to be more ambiguous, as some interviewees claimed to have concerns with regard to its effect on the housing market. Finally, distributed trust on the platform seemed significant, as ratings often serve as a means of predicting guests' trustworthiness.

Most of the hosts we interviewed were aware of the fact that discrimination is not tolerated at all by the platform, so it is not surprising that we could hardly identify any cases of overt discrimination; however, latent forms of discrimination and negative attitudes as well as stereotypes that were formed by the hosts in relation to numerous nationalities and minorities were explored in our empirical research.

**Keywords**: online trust, online risk, digital discrimination, Airbnb Budapest, COVID-19 crisis

## Introduction

The number of sharing economy platforms is rapidly growing worldwide, especially peer-to-peer (P2P) online marketplaces that operate in the travel and tourism industry. In line with this, there has also been growing scientific interest in the field of the sharing economy and

collaborative consumption platforms. On the one hand, some scholars understand these peer-to-peer platforms as a positive paradigm change away from conventional economic business models that has the potential to democratize socio-economic relations (Belk, 2010). Furthermore, according to Codagnone et al. (2016), consumer welfare has increased due to related service delivery capacity and lower prices.

On the other hand, another line of argumentation highlights the potential 'neoliberal nightmare' of the sharing economy (Martin, 2016), and also how disadvantaged people are excluded from sharing economy activities (Schor, 2017). A further critique is that the sharing economy has nothing to do with sharing (Slee, 2015; Scholz, 2016) – e.g. as Airbnb is basically a short-term renting platform, and Uber operates as an unregulated taxi company. Certain scholars use the term 'sharewashing,' meaning a specific marketing strategy of promoting business based on the idea of sharing, rather than on profit-oriented principles (Tu, 2017; Schormair, 2019).

Creating social links and building trust play crucial roles on collaborative consumption platforms. Trust has received much attention in different disciplines of social science, with a focus on the role of trust in a new era of radical transformation due to emerging digital technologies that are changing every facet of our everyday lives. Some sharing platforms, especially those that are labelled 'peer-to-peer,' such as ridesharing or home-sharing platforms, are providers of risky, 'high-stakes' offline experiences, thus making trust between users a crucial resource. Empirical studies that have focused on P2P marketplaces operating in the field of tourism and travel have also mushroomed in past years. Related to our research topics of online trust, potential risks, and the prevalence of discrimination, the most relevant papers about Airbnb and other home-sharing platforms are as follows: Edelman et al. (2016); Ert et al. (2016); Király & Dén Nagy (2014); Lui (2012); and Zervas et al. (2017).

Our current paper[1] aims to contribute to the discussion on trust by providing a comprehensive overview of the role of different layers of trust in Airbnb services, based on a qualitative case study carried out in Budapest in 2020. Beyond the role of trust, we aim to explore the working mechanisms of online risk and potential sources of discrimination using qualitative tools, as only limited research-based evidence is available about this issue. Farmaki and Kladou (2020) have pointed out that discrimination on P2P accommodation platforms has received sporadic academic attention.

Regarding our research context, tourism and accommodation services have been among the most substantial economic sectors in Hungary. The number of accommodation services (or short-term rentals) in Budapest has seen steady growth since 2011. A significant role in this recent development has been played by the arrival of Airbnb, concentrated in the inner city of Budapest. As of 2019, Airbnb was listing more than 10,000 rental outlets (apartments or rooms) in Budapest, mostly in the inner city, which is a 70 percent increase over three years (the number of Airbnb listings was 6,300 in 2016) (Forbes, 2019). For previous research on the touristic and economic aspects of Airbnb in inner Budapest, see the work of Olt and his colleagues (2018; 2019).

Airbnb entered the landscape as an international company in Hungary and does not have a locally registered company in the country. It seems that the market entry was smooth, as, in contrast to the local transport sector, no regulation required Airbnb to be registered in Hungary.

According to the current Hungarian regulation, it is only the real estate owners and renters who are responsible for complying with taxation rules and other regulations. At the same time, only local renters, other accommodation service providers establish contractual relationships with Airbnb headquarters. From its end, Airbnb generally requires users to fulfil local decrees and legislative requirements, without specifying what these are. (Meszmann, 2018, p. 11)

Our methodological approach is basically qualitative: along with textual analysis of online platforms and portals, we conducted semi-structured interviews with different Airbnb stakeholders. As our research was carried out in the first half of 2020, we had to cope with the COVID-19 related interventions that affected Budapest significantly in mid-March 2020. Generally, platforms working within the segments of travel and tourism, and especially Airbnb, proved to be very vulnerable to the global pandemic, thus our research has special significance in this respect (Farmaki et al., 2020).

The paper is structured in the following way: after an introduction (Section 1), the conceptual framework of the sharing economy is summarized (Section 2), followed by a presentation of the theoretical background and previous research in the field (Section 3). This is followed by a description of the research methods (Section 4). In Section 5, the results of our research are presented, and in Section 6 a short summary is given. Finally, conclusions are drawn, including a short discussion of results (Section 7).

## 2. Conceptual framework

We understand Airbnb services within the framework of *collaborative consumption*, or in more practical terms, as a special *peer-to-peer (P2P) accommodation* platform. As collaborative consumption platforms are rapidly growing worldwide, the model they represent is developing in a rather hectic manner (EPRS, 2017). The blurring distinctions between *public* and *private*, as well as information asymmetry, raise multiple concerns. These blurring distinctions entail mainly regulation-related problems, whereas information asymmetry might also lead to moral hazard, according to Cohen and Sundararajan (2017). Moral hazard includes risks such as customers receiving lower equality services, the potentially lower level of effort of the service provider (e.g. less responsible, less punctual hosts) compared to services provided by the regular economy (e.g. home sharing vs. regular hotel services).

Contrasted with conventional economic business models – in which service providers offer their services to their
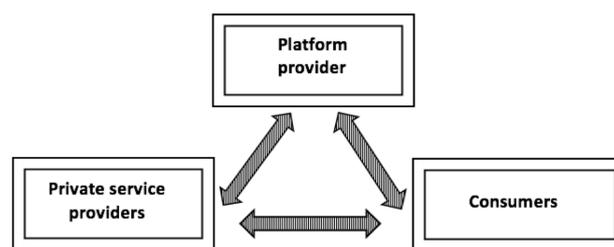


Figure 1: *Relations in a peer-to-peer economic business model*
Source: EPRS (2017, p.26)

customers – in the peer-to-peer economy, the relationship between service providers and consumers is different: the individual consumer interacts with both the platform provider and with an individual who is typically referred to as a *service provider* (Figure 1).

The different models created by the sharing economy can raise some legal and ethical (labor-related) concerns. Vaskelainen and Tura (2018) carried out an extended mapping of problems associated with the sharing economy. As a result of their analysis, various concerns were identified related to safety, discrimination, unfair competition, and worker classification.

As in many other European countries, the regulation of collaborative consumption platforms seems to be a recurring issue in Hungary as well. Social dialogue in general, even in the traditional economic sectors, is weak, and thus it is also missing from the various sub-sectors of the Hungarian sharing economy. The lack of labor market protection of platform workers and sharing-economy-service-providing individuals is among the most important consequences of the insufficient regulations. Examples of issues with Airbnb (e.g. underpaid cleaners) and Uber (e.g. exhausted drivers because of long shifts) illustrate the above concerns best.
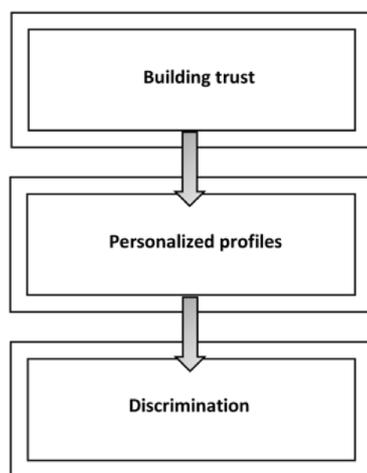


Figure 2: *The process of building trust and potential consequences in business models of the P2P economy*
*Source: Authors' construction*

On many online platforms, racial and any other kinds of discrimination are prohibited either by anti-discrimination policies or by rules of conduct that articulate desirable behavior. Airbnb not only uses anti-discriminatory regulation, but has also introduced a so-called Open Doors policy since 2016 – meaning that since that time Airbnb has provided booking assistance to those who feel they have been discriminated against (McMahon, 2016). However, discrimination still exists in practice, as built-in selection mechanisms result in unintended consequences such as discriminating against platform users associated with certain groups or minorities (practically speaking, both hosts and guests can select whom they want to share their home with, although it is getting more difficult to refuse a guest on Airbnb). Despite this, creating and maintaining trust is crucial in peer-to-peer online platforms because the verification of the identities, intentions, and capabilities of service providers is essential in these interactions. Such a dilemma can be solved through employing certain incentives and practical measures (Figure 2).

Consequently, the questions that are raised are manifold; related research questions are specified in the next section.

## 3. Background and previous research in the field

### 3.1 Trust and risk associated with collaborative consumption platforms

Trust has received much attention in various disciplines of the social sciences, with a focus on the role of trust in a new era of radical transformation due to emerging digital technologies that are changing every facet of our everyday lives.

According to Sztompka (1999), trust can be seen as a gradually extending circle. It starts on a personal level, where trust can be seen as a personality trait that derives from successful socialization. The interpersonal level starts with the family and the most intimate face-to-face relationships, and widens into social trust in absent others, like representatives of institutions,

and social objects. These types of trust (personal, interpersonal, and social) are embedded in a cultural context. Putnam (2000) uses a different approach, as he distinguishes two types of trust: *thin* and *thick* trust. While the latter is associated with local communities, and is embedded in frequent social relations, thin trust, which is also based on expectations of reciprocity, extends 'the radius of trust beyond the roster of people whom we can know personally' (Putnam, 2000, p. 159). In premodern, local societies, *interpersonal trust* was the only type of trust, but the need to manage the increasing populations of industrial societies gave rise to institutions, which created another, more abstract type of trust: *thin trust*. Thin trust makes it possible for people to extend their radius of trust, so when it comes to today's digitalized society – which can be interpreted as a network society (Castells, 2000) – a new form of trust emerges. *Distributed trust* 'flows laterally between individuals, enabled by networks, platforms and systems' (Botsman, 2017, p. 258). It is associated with an immense advantage: since distributed trust meets the requirements of today's information and digital-network-based society, it can be seen as the contemporary equivalent of premodern face-to-face trust. Due to its network nature, distributed trust is heavily based on the ratings of guests and hosts on platforms such as that of Airbnb (Botsman, 2017).

Based on the categorization of Sztompka's and Botsman's approach, we assess trust in a complex way: (i) as the *personality traits* of the interviewed hosts, (ii) as *interpersonal trust* between hosts and guests, (iii) as the *social trust* of hosts in Airbnb and its representatives embodied by people working in its customer service, and finally, (iv) as *distributed trust* in the platform and its ratings.

Digital (or online) trust is a required and essential resource for sharing platforms. Furthermore, 'by 2020, trust has clearly become the currency of the online space. Trust is also the real essence of [the] sharing economy' (Szűts & Yoo, 2020, p. 30). This means that 'trustworthiness, not only trust is the key ingredient' (Putnam, 2000, p. 175). In online interactions, trust has to be approached differently, as the level of agents' trustworthiness is not known (Chen & Fadlalla, 2009, p. 87). Due to the factor of anonymity, there is hardly any trust when there is no information available about the individuals you plan to share an offline experience with (Cui et al., 2017). It seems that this lack of information is one of the main reasons the ratings of Airbnb hosts and guests have such significance. It may be presumed that trustworthiness is one of the most important assets of hosts, since reviews have a crucial role in the number of bookings. The perception of guests as trustworthy is also important, as the confirmation of their bookings depends on that feature to a large extent.

Trust is strongly tied to risk, which can be defined as the gap between the known and the unknown (Botsman, 2017, pp. 27–30). When it comes to collaborative consumption, risks are not only personal but economic. Based on this, trust can be viewed as a risk-reducing strategy (Giddens, 1997, p. 35; Sztompka, 1999, p. 29). According to some theorists, 'unknown and unintended consequences [have] come to be a dominant force in history and society' (Beck, 1992, p. 22). Beck argues that risk shapes society both on a structural and on a discursive level. As it seems that risk is a central force in our societies, risk reduction – via building trust – has become a central issue. When it comes to Airbnb, a potential lack of information creates an information gap, which results in an increase in the level of risk for both hosts and guests. Stereotype-based selection strategies may serve as a means of overcoming the situation of a lack of information.

Finally, privacy concerns are a highly relevant subject in a discussion about trust and the personal information of consumers (Chen & Fadlalla, 2009, p. 85). Collaborative consumption platforms create a unique form of social capital that relies on both positive and negative

exchanges (Codagnone et al., 2016). The role of 'visual-based trust' in online transactions (Ert et al., 2016), demographic information (Cui et al., 2017), and the prior experiences of others (e.g. rating systems for ridesharing platforms) need to be taken into account to be able to analyze the characteristics of collaborative consumption platforms

## 3.2 Trust, risks, and discrimination: a vicious circle

Some sharing platforms, especially those that are labelled with the term 'peer-to-peer,' such as ride- or home-sharing platforms, are providers of risky, 'high-stakes' offline experiences, thus making trust between users a crucial resource. To create and maintain online trust, collaborative consumption platforms incorporate review and reputation systems, as well as the pervasive use of personal photos of the service providers, which serve as a form of identity verification.

There is growing research evidence that the abovementioned sorts of information play a key role in establishing online trust (Liu, 2012; Király & Dén Nagy, 2014; Ert et al., 2016). However, publicly available profiles on sharing platforms (often linked to the Facebook or LinkedIn profiles of users) not only facilitate online trust but can also provide a space for racial and gender-based discrimination (Edelman & Luca, 2014; Edelman et al., 2016; Ge et al., 2016; Simonovits et al., 2018).

Ert and his colleagues (2016) examined the role of photos of hosts on guests' perceptions of trustworthiness on Airbnb by empirically analyzing online platform data. The latter (2016) found that the effects of the hosts' photos – which serve to establish visual-based trust – had more influence on trust than reviews left by other users.[2] Ert and his colleagues also found that hosts that are perceived by users as more trustworthy charge more for their accommodation than their less trustworthy counterparts. Female hosts were preferred over male hosts. The interplay between trust and reputation merits examination, as trust can be fostered by reputation in the form of ratings, but is mediated by other factors such as visual-based trust. Additionally, when starting using a collaborative consumption platform, users do not have a reputation on which they can build trust, and a photo serves as the first mechanism.

Focusing on Hungary, qualitative research has been conducted in this field by Dén-Nagy and Király (2014). The authors posit that those who join sharing networks are likely to have an above-average propensity to trust at the personality level. The researchers found that the range of associated risks were generally thought to be small, and centered more on risks to emotional wellbeing such as the risk of encountering an awkward situation. Risks of safety to person and property were mentioned with less frequency.

Beyond the role of trust and risk in the sharing economy, the role of discrimination merits exploration as well. Cui and her colleagues (2017) created fictitious guest accounts on Airbnb and sent requests for accommodation to approximately 1500 hosts. The researchers found that, when compared with requests from white-sounding names, requests from guests whose names signaled they were African American were 19.2 per cent less likely to be accepted. In line with the emphasis placed on reviews in the associated literature, reviews significantly reduced the likelihood of rejection. The authors claim that this is an example of statistical discrimination, in which first judgments are made based on the appraisal of the racial group, but evaluators are amenable to changing their judgments based on new information.

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2    In general, there is little variance in Airbnb review scores based on an analysis of five large European cities that revealed the average rating to be between 4.5 and 5 stars (Ert et al., 2016).

More recently, Farmaki and Kladou (2020) used qualitative research techniques to explore various forms and grounds for digital discrimination on Airbnb. In their analytical approach, they viewed Airbnb hosts as the 'gatekeepers' who decide whether to select or reject prospective guests. The thematic analysis of the interviews (carried out with 41 Airbnb hosts throughout Europe) revealed that 'despite Airbnb's anti-discrimination policy, many hosts continue to "select" their guests, illustrating that they choose to bypass the instant booking option' (p.184). On the other hand, the researchers argue that 'there is the possibility of discrimination alleviation after positive encounters between hosts and guests' (p.184). The authors also pointed out that new P2P platforms (e.g. Muzbnb, the Muslim-friendly Airbnb) have emerged in response to the discriminatory practices associated with Airbnb.

## 4. Data and methods

### 4.1 Methodological approach

Our methodological approach is basically qualitative (semi-structured interviews with different stakeholders) – however, we supplemented our study with quantitative media analysis (using Sentione, a social listening piece of software) that analyzed online discussions by platform workers and hosts. The pool of interviewees was those who *operate and work in* this business, covering various actors participating as hosts (either investors or those actually working in the Airbnb business), and as formal and informal employees or workers – i.e. managers or assistants (those who let in guests, cleaners, etc.).

From a methodological perspective, our study can also be understood as *a natural experiment.* As the fieldwork was carried out in the first half of 2020, we had to cope with COVID-19 related interventions, which significantly affected life in Budapest from mid-March 2020 onwards. After the lockdown of the capital went into effect, we were at first unsure whether we should suspend our data collection efforts, but we decided to continue with an extended version of the interview guide that reflected on the effects of the COVID-19 crisis, which has obviously had an enormous impact on the Airbnb sector. From April to June 2020 we returned to the interviewees with a shorter 'follow-up' interview, and asked them about the perceived effects of the COVID-19 crisis on the Airbnb sector in Budapest. As a result, a total of 21 semi-structured interviews were conducted in the first half of 2020, partly before and partly after mid-March.

### 4.2 Research questions

In our analysis we distinguished between primary and secondary research questions, as the effects of the COVID-19 crisis came into focus in our research only later. It is also worth mentioning here that the current paper is a part of a comprehensive study on Airbnb Budapest, and that the interview also covered additional topics designed to help explore further research questions.[3] For parallel research on the survival strategies of Airbnb stakeholders in relation to the COVID-19 crisis, see Olt et al. (ongoing).

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3    Why do people working in the Airbnb business choose this type of atypical work? What are the pros and cons of 'on-demand' or flexible working conditions, and are the former always 'on standby'? What are their working conditions in terms of flexibility, working hours, etc.? What are the social- and personal-level benefits of participating in this business in terms of networking, socializing, learning languages and about new cultures, and acquiring other new skills, such as flexibility, communication, and how to build one's own small business, etc.?

The primary research questions are:

RQ1: Who are the main stakeholders in this specific sector, and what is their motivation for participating in the Airbnb business?

RQ2: How do different types of trust work on Airbnb?

RQ3: What kinds of risks are perceived by the hosts? Is discrimination a potential consequence of the above-described risks? If so, what kinds of discrimination are prevalent on the Airbnb platform in terms of race, nationality, age, and gender?

The secondary research questions:

RQ4: How has the COVID-19 crisis affected the different layers of online trust?

RQ5: How has the COVID-19 crisis affected different forms of risk in the Airbnb sector in Budapest? and,

RQ6: How did the COVID-19 crisis affect the former's working conditions and working hours throughout the first half of 2020?

## 4.3 Sampling

We used the following sampling strategy: a small pool of initial informants was identified through the social networks of our research team. We applied snowball sampling to identify further interviewees. To expand our recruitment strategy, our staff joined specific Facebook groups[4] and posted ads to find further informants, such as hosts and managers located in Budapest. As we focused our attention on those who actually *work* in this sector, we modified Airbnb's categorization[5] to a certain extent and completed the pool of interviewees with helpers – as, for our research purpose, we were interested in the views of those who actively take part in the Airbnb business. Finally, we identified the following types of interviewees (aiming to achieve a fair balance of the different types of stakeholders, gender, and age groups working in the Airbnb business).

1. Hosts, co-hosts, and managers: those who *own or manage a property* or who *assist* hosts with managing their listings and guests. They usually have access to an Airbnb account, communicate with guests, and have a broad overview of the platform (16 interviews).

2. Helpers: mostly students or other part-time workers who let in guests, as well as people who clean and possibly run smaller errands associated with rental units (e.g. buy small items) (5 interviews).

To sum up, two-thirds of the interviews were undertaken with (i) hosts, co-hosts, and managers and one-third with (ii) helpers.

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4   Spring 2020 we joined a group called 'Airbnb Budapest & Hungary forum of hosts' which has over 5,600 members.

5   Airbnb identifies the following three types of hosts that can manage a reservation. (i) Listing owner: The person who lists the space on their Airbnb account. This is usually the person who owns or lives on the property. If the primary host is also the listing owner, guest ratings and reviews will appear on their profile and will affect their Superhost status; (ii) Co-host: Someone, usually a friend or family member, who helps the host manage their listing and guests. Guest ratings and reviews do not appear on the co-host's profile or affect their Superhost status; (iii) Hosting team: A hosting team may be a business or team of people that manages places to stay on behalf of the listing owner. They may do everything from setting pricing to meeting guests at check-in to scheduling property maintenance. source: https://www.airbnb.com/help/article/1536/what-is-a-primary-host

Our sample consisted of Airbnb stakeholders of both genders (13 female interviewees, 8 male interviewees) between the ages of 20 and 64 years; sample size was not determined exactly in advance; our aim was to collect the proper amount and variety of information from the different stakeholders. The length of the interviews ranged from 38 minutes to 116 minutes with an average of 60 minutes. Most of the interviewees use the Airbnb platform as guests besides working for the company (further information about the interviewees may be found in Annex A Table A3).

### 4.4 Types of interviews

As we had multiple interview types (simple, follow-up, and extended), we used multiple guidelines as well. As with our initial research, all guidelines contained questions related to participation, trust, risks, and potential sources of discrimination prevalent in the Airbnb business. Beyond that, interviewees were asked about their experiences and working conditions as well as about their general opinion about Airbnb as a company.

Analysis of the interviews was based on the so-called template approach (Crabtree–Miller 1999), and for data analysis we used the NVivo qualitative data analysis software. The templates, with numerous and relatively long direct quotations, were written in Hungarian, while short summaries were also compiled in English. We created several codes according to the different topics of the interviews, and then coded extracts using the following words: trust, discrimination, differentiation regulation, culture, nationality, corona, and epidemic.[6] Thematic analysis is a poorly demarcated and rarely acknowledged – yet widely used –qualitative analytical method (Boyatzis, 1998; Roulston, 2001). The advantage of this method is primarily its flexibility. Braun and Clarke (2006) differentiate several steps for making qualitative research as transparent as possible. In line with the recommended steps defined by the former, (1) after familiarizing ourselves with the interviews, (2) we generated the initial codes. Then (3) we searched for the themes with the help of these codes, and (4) we reviewed them. The next step was (5) defining and naming the different themes, and finally (6) we compiled the report.

The various themes were created in accordance with the recorded keywords and the related concepts. We looked through often-mentioned elements and their synonyms and rarely expressed opinions as well, and tried to compare them within the variety of themes. We also completed our analysis with citations in order to make our results more tangible. For further details on the process of our analytical process, see Annex B.

### 4.5 Analysis of online narratives

Using interviews as a main source of information is favorable in many regards. However, it can be beneficial to complement the interview analysis and its rather narrow focus. In order to provide a narrative background to the interview analysis, we undertook a short analysis of online narratives regarding Covid-19 and Airbnb. For this we used the social listening tool SentiOne.[7] In line with its default settings, SentiOne searches for texts containing the given keywords on the entire internet, focusing on user-generated content from all kinds of

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6    To code the extracts, we used the Hungarian interview summaries, and only the results of the coding were translated.

7    SentiOne is a keyword-based piece of social listening software which "monitors all kinds of statements, comments, and articles posted publicly all over the internet" (SentiOne.com) regardless of narrowing factors like country of origin or nationality.

websites and in social media.[8] However, as our aim was to broadly illustrate some aspects of the Hungarian discourse that serve as the background for the interview analysis, we only searched for keywords in Hungarian.[9,10] It is important to note that because of the anonymity of the internet we were not able to ascertain what the position of the people making the statements was (host, guest, or non-related to Airbnb) in the examined texts.

However, we made a distinction between articles and other types of statements from private persons – which we call opinion-type texts – in order to increase reliability. Using SentiOne, we gathered 741 texts out of which we examined 625 articles and 116 opinion-type texts. Our focus was on the latter, as our aim was to identify further examples about different narratives. Opinion-type texts are mainly from social media posts, although comments on articles and discussions on forums were also significant (see Figure B2 and B3). Online analysis is able to reach more people and identify selection mechanisms, while other potentially influencing factors (e.g. willingness to interview, perceived expectations, and preconceptions of interviewees) have little to no effect. Therefore, despite the inconvenience of online anonymity, we aimed to grasp different interpretations about Airbnb during the pandemic. The intention was to give some hints about the narratives that exist in the Hungarian online space, thus our short online analysis should be treated more as a cursory outline of some of the aspects of narratives that occur online about the Covid-19 pandemic and Airbnb. Further details and examples are embedded in the interview analysis that serves as a supplement.

## 5. Results

Below, we present our results based on the interviews and the online discourse analysis. First we summarize the general discussions about Airbnb, mostly based on the online discourse analysis. Then we discuss participants' motivation for joining Airbnb, and the working conditions at Airbnb Budapest, primarily based on the interviews. This is followed by a complex analysis of our core issues: the different layers of perceived trust; and risks in relation to potentially discriminatory selection mechanisms. Finally, we reflect on the effects of the COVID-19 crisis based on our interviews.

### 5.1 General discourses on Airbnb

Using the most frequently mentioned elements, which were thematized as concepts related to money, trust, industry, people, and type of work, we made a so-called thematic tree (see Annex B Figure B1). Keywords were chosen based on the topics in the interviews and frequently mentioned elements related to participants' sources of motivation and visions of their work. In Figure B1, we can see the main themes found in the interviewees' answers.

We also examined some general aspects: based on our online complementary analysis, the frequency of mentions of the two examined keywords (Airbnb and Covid) was higher, indicating that the discourse was more intensive during the early stage of the pandemic that affected Europe in the spring of 2020. This may be related to the novelty of the situation and the issues

8    'When crawling websites, SentiOne tries to gather as much data as possible for further analysis. SentiOne monitors domains that include user generated content like blogs, forums, news and review sites. (…) SentiOne gathers data from various social media sites by their official APIs' (SentiOne.com).

9    We searched for texts which contained the keywords 'Airbnb' and 'Coronavirus,' plus its synonyms and conjugated forms in Hungarian (virus, covid, Covid-19, pandemic), resulting in 741 mentions. We also searched for 'Airbnb' and 'risk' and its conjugated forms, also in Hungarian, resulting in 249 mentions.

10   We gathered texts from 9 March to 31 December.

only then emerging regarding its consequences. We identified a peak between 6 and 13 July[11] (see Figure B4 and B5). Looking at the keyword cloud based on SentiOne's algorithm,[12] we can see the most frequent associations regarding the pandemic (see Figure B6). With some limitations, we can see some aspects of the Hungarian discourse about the Covid-19 crisis with regard to Airbnb. Based on the keywords, the online discussion is related (i) to the new situation (*pandemic, virus, coronavirus, effect*), (ii) to the economy (*economy, price, market*), to tourism (*travelling, tourism*) and, (iii) to rentals (*flat, renting, policy*).

Participants displayed various attitudes towards Airbnb. Elements filled with positive emotion that were often mentioned included *money*, and *meeting new people and getting to know many cultures: 'This way, the world comes to my place, I don't have to travel'* (female, 58, host). Airbnb's future was seen positively because of its potential for strengthening trust between people *('I think that the model of a sharing economy that is based on trust is spreading to more and more spheres of life. I think that in a heavily globalized world like this, we can get very close to each other and we can really see into each other's lives. I think that maybe it can also help this country a little – where people are so distrustful, distant, and uninformed that they really are able to be afraid of anything, which is dreadful to me'* (female, 55, host). Demand for Airbnb is seen to be growing.

## 5.2 Motivations for joining Airbnb

The topic-related items show the main reasons for joining Airbnb. Elements often mentioned by participants include *'[The biggest motivation is] feedback. Hospitality itself. There is no greater pleasure than when I see through the camera that the guests have arrived, that they're jumping and screaming. And then right away that 'we've checked in and we like it very much and we're happy.' And when they leave, they don't just review it as 'okay,' but usually write a recommendation of 8-10 lines'* (host, female, 55 yrs.). Almost all interviewees mentioned earning money as an obvious reason for joining Airbnb. A significant number of the participants appreciated the ability to be flexible, and the not overly challenging means of earning an income. *'It's really flexible, we don't have to work every day for eight hours'* (host, female, 23 yrs.). Others highlighted that their main motivation for the work is providing a nice experience and comfort to guests: *'My philosophy is, as I told you at the beginning, that it is important that the guests feel good here, that I do everything for it to make it good and for them to return later'* (host, male, 42 yrs.).

In most cases, people working for Airbnb speak languages in addition to Hungarian and they are open-minded enough to enjoy meeting new people and getting to know different cultures. *'This way, the world comes to my place, I don't have to travel'* (host, female, 58 yrs.). Another positively considered element was *getting to know new people*. Unique reasons for joining were *the professionality of the company* and *making profit on one's real estate*. To sum up, most participants are satisfied with their jobs because of the enjoyment this activity creates *('I'm so happy about Airbnb… so the main reason I'm doing it is because it brings so much joy';* female, 44, host), mainly because of its flexible nature and because it presents them with the opportunity to be part of something international.

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11   The peak was mainly caused by the immense amount of similar articles regarding the National Consultation about Covid-19 and the related regulations in a broad sense (e.g. obligatory mask-wearing, and social distancing). These articles make up 80 per cent of all mentions in that period.
12   A keyword cloud 'shows words that are most frequently used in the context of your project' (SentiOne.com).

However, based on the online analysis, risk is seen to be an inherent part of investing in general, and investing in the housing market in particular, but the risk can be seen as unavoidable element involved in profit making.[13] Participants had highly positive expectations before starting to work for Airbnb, and they did not mention any bad experiences they had heard about before joining the company: *'It's easy, you don't have to work for it too much. An easy source of income. Your flat works constantly. It 'brings back' [returns] its cost within 10 years'* (host, female, 40 yrs.).[14]

## 5.3 Working conditions at Airbnb Budapest

Lots of people like working in the Airbnb business because of the good working conditions, although some participants claimed to have experienced difficulties. *'Things can't be planned, reservations are very frequent, and they check in at various times before arrival'* (host, female, 45 yrs.). People also mentioned that they do not need to put much effort into successfully managing their job-related tasks. Most of the interviewees also appreciated the amount of pay they receive for the work and time they invest. Both flexibility and inflexibility were mentioned several times in response to questions related to work and working conditions. Some people said that they enjoy the activity and like the predictability of the job, while others had more negative opinions.

People mentioned working overtime when there is a lack of personnel on their team. People also mentioned that regular overtime had a negative effect on their private life. *'If you work in the same position as I did, you can't afford to have a social life, because of the working hours'* (primary co-host, male, 19 yrs.). The assessment of the job depended to a large extent on the position of the interviewees. Dissatisfaction was mentioned more often by people working in higher positions who often had to invest more time and effort into doing their job properly. Rarely mentioned elements included getting to know the functioning of the organization better, and managing discounts and recurring problems with guests. People expressed mild dissonance between being satisfied with their job and the moral dilemma posed by rising prices in the long-term rental market caused by the appearance of Airbnb.

Based on online comments, two rather extreme interpretations emerge about Airbnb. On the one hand, Airbnb is seen as a market participant that pursues its own interests, which can have negative effects (high housing prices, a crowded and noisy city center, hard living conditions,[15] even a 'housing crisis').[16] In line with this point of view, Airbnb is seen to be 'guilty' of many things. The other view is that Airbnb should not be faulted.[17] On the contrary,

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13   *'Somebody wrote that there is more profit on Airbnb. Yes. More work, but with bigger risk'* (Online comment on Facebook).

14   https://www.airbnb.com/help/article/1523/general-questions-about-the-airbnb-community-commitment?_set_bev_on_new_domain=1587274531_M2QzN2UzMzYyMmNk&locale=en

15   'The city centre became hard to live in, especially those houses where there are constant comings and goings and noise because of the many Airbnb flats, probably also a bar on the ground floor. And yes, Airbnb contributed greatly to cheap alcohol-tourism, along with low-cost airlines' (online comment from Facebook).

16   'The housing market (has been) problematic throughout the whole world thanks to rising prices largely caused by Airbnb. A significant number of short-term Airbnbs weren't available on the long-term market and prices increased more and more' (online comment on a forum).

17   'Obviously, if only the city center has become more expensive, this isn't a housing crisis, because it's not necessary for everyone to live there. So Airbnb can be responsible only for a housing crisis in the city center, because it cannot be responsible where it isn't present… no?' (online comment from Facebook).

it does good as it provides many people with jobs.[18],[19] Finally regarding the online discourse analysis, it is worth noting that even though we are not able to tell who the commenters were, it seems that this conflict involves locals vs. hosts rather than hosts vs. guests.

*5.4 Layers of trust, risks, and potentially discriminatory selection mechanisms*

When evaluating trust and risks, and potential sources of discrimination, participants differentiate between *interpersonal* trust between guests and hosts on the Airbnb platform, and *institutional trust* in the platform itself. *'I think trusting in foreigners can involve a kind of social mission. It can also promote social peace. The more companies like this exist, the better the situation would be'* (host, female, 64 yrs.).

When choosing a guest or a host, most people prefer to check the ratings of the place, or whether the user puts emphasis on creating online trust. *'If somebody doesn't use a profile picture, it means he or she has secrets. The host tries to build trust with the profile picture, they try to show that they are travelers as well. As a photographer, I took photos of many apartments and took photos of the owners as well'* (host, female, 40 yrs.). On the other hand, as online trust is generated without the hosts and the guests personally knowing each other in advance, it must happen only by making conclusions based on relatively little information. *'It is important to know that Airbnb as a platform doesn't show the ages of the guests, nor their ethnicity, so we can't make conclusions regarding gender and age, but we may have expectations with regard to their nationality. And I am opposed to making predictions or generalizations based on someone's nationality'* (host, male, 38 yrs.). On the other hand, certain hosts overtly expressed that they prefer European guests.

Related to the above-mentioned Airbnb policy, below we show two controversial arguments; both of the interviewed hosts argued that they were willing to accept all types of guests, but in the very same sentence it turned out that they do not like, or even do not accept, certain nationalities. '*I accept all guests; there aren't any groups that I do not. However, Arabic guests I do not like to work with, as they are full of self-conceit and I have had a very bad experience with them, which I do not want to speak about*' (male, 22, host). Another host who dislikes Romanian guests stated that: '*...I accept everyone, except for the Romanians, I do not like them, basically*' (male, host, 42).

If hosts were able to choose who to lease their apartments to, many of them would prefer not to host people from Eastern European and Asian countries because of bad experiences with them. Most of the interviewees mentioned cultural and historical differences that can cause difficulties. Stereotypes also emerged in a few cases. They involved young British people, people from South Korea, and those from Arab countries, but also guests arriving from France, the US, or Romania.

Stereotyping related to gender and sexual identity were also discovered. *'There are some nationalities I'd have some concern with, but my conscience will not let me discriminate against them. Because we had nice guests from these groups too, and we didn't have any problems. I say that with some nationalities there is a risk that you will find something you really don't want to [when cleaning flats]. But that's it: this risk has to be taken'* (host, female, 55 yrs.). Similarly, the

18   'Making it impossible for Airbnb won't hurt investors but the economy of the city center, which is built on that industry, from key managers through cleaners to local cooks and bartenders' (online comment on article).
19   'Managing more houses requires more people; we are making a living from this. There are many who do this similarly to us, but they can't do almost everything on their own, so they give jobs to other people, provide livelihoods for other families' (online comment on forum).

stereotype of young party people also appeared in the comments of private persons.[20] Bigger groups are also not always welcome, especially those who come to Budapest to celebrate stag parties: '*It is totally understandable if someone wants to select their guests. Those who come to party generally ruin the flats. We were not happy to accept guests who come here for stag parties as we had double the work after them*' (female, 23, host) In a broader sense, this is connected to problems between locals and so-called 'party-tourists.'

Being able to freely choose who to rent out apartments to was connected with evasive answers. The usual answers were connected to Airbnb regulations and personal experiences and opinions concerning positive and negative aspects of the situation. In some cases, regulations are not taken completely seriously. '*I don't know if it can be regulated, but I suppose not. I heard about a method that is applied by some hosts. Instead of lowering the prices too much, they try to find a range that is a bit above the average. With the help of this method they can avoid the presence of people who come from the worst social situation*' (host, female, 64 yrs.). This connection between low prices and unwanted guests also appeared in the online analysis.[21] This suggests the existence of a grey area where selecting one's guests is possible.

Most of our informants agreed that problems are not caused by direct discrimination but that perceived difficulties may rather be due to certain cultural differences. '*Since this is a business, everyone is welcome who wants to be here, is able to pay, and is a normal person. Neither others nor I make a distinction between guests, but my 14 years of experience has made me cautious with people from certain countries*' (host, female, 64 yrs.). People from the East were mentioned as persons who may be associated with problems. Gender and national stereotypes were also mentioned by a few of the participants (e.g. 'guests from India leave a lot of hair in the bath,' 'Russians arrive with big bags full of food bought right after arrival,' 'guests from Scandinavian countries are always on time,' 'travelers from Southern European countries do not speak English well,' 'two girls together are always worse in general, girls are extremely untidy. The best guests are gay boys').

The number of participants who thought that profile information is reliable is almost equal to those who consider it more or less reliable. Negative experiences were mentioned in connection with the condition of apartments, and because of false expectations. The behavior of hosts and guests was also mentioned as an issue.

About one-third of participants did not know about Airbnb's antidiscrimination policy, which has been in effect since 2016. '*Obviously, as a host, it's good to know [what is written in the 2016 antidiscrimination regulation], but I violated it quickly, as basically I'm trying to avoid these overly liberal things*' (host, male, 42 yrs.). Some of the interviewees said that they have concerns about this regulation because it is easy to find a way to ignore it. Some argued that letting someone into their personal sphere is such a private decision that hosts need to have space to decide.

Those interviewees who manage numerous apartments claim that it is not worth discriminating as hosts, as if a host cancels a guest the rating for the given flat is lowered. '*Theoretically you have the right to cancel any guest's booking, but if you indicate that you have cancelled because the guest is Black or Jewish… Airbnb will probably cancel your account*' (primary co-host, male, 19 yrs.). Another host argues that '*as a host I cannot decide who to welcome, and*

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20 'Well… when there are no more drunk youngsters from Western countries arriving on budget flights, staying in Airbnbs, getting drunk in the city center, and spending their remaining time with cheap girls – there won't be tourism' (online comment from Facebook).

21 '*[As owners] we* didn't want problems for us or our neighbors, so we didn't suppress prices or rent out the flat to the first person who was interested' (online comment on forum).

*I haven't refused anyone so far'* (host, female, 29 yrs.). But there are diverse views about this as well: '*On the one hand, you should be able to rent out your flat to whomever you want, and trust him or her; on the other hand, in my view, there is a risk of racism in this freedom.*' Furthermore, one of the interviewees claimed that in some cases young African American guests claimed that they were discriminated against by their Hungarian hosts. '*They tried to use the "black card" in order to get an advantage*' (male, primary co-host, 19 yrs.).

Although the guideline consisted of questions directly related to discrimination, participants made reference to hidden forms of discrimination many times. '*We can make conclusions according to the style of the written e-mails which are sent by the guests. To sum up, I like European people better*' (host, female, 58 yrs.). Some of the interviewees mentioned guests' financial situation as a means of predicting their behavior: '*Unfortunately, people who don't have much money are undemanding. What's more, they are more likely to give negative feedback...*' (female, host, 55).

## 5.5 The perceived effects of the COVID-19 crisis

Before the COVID-19 crisis, participants had complex opinions regarding the future of the Airbnb sector. Some of them thought that it might have a negative impact on other types of accommodation, and stricter regulations are needed to make competition between Airbnb and its rivals fairer. The COVID-19 pandemic presented Airbnb with an unexpected situation, so it had to come up with solutions for protecting the company, its workers, and its guests. Interviewees had several reasons to be concerned. As soon as the virus spread throughout Europe, people started to cancel their bookings, in line with government regulations. '*April and May are zero [there are no bookings at all]...*' (helper, female, 29 yrs.). By mid-March, most of the bookings had been cancelled for a three-to-six-month period, and, in line with the company's new regulations, guests received refunds. What remained were mostly bookings by Hungarian citizens who had to travel because of work or family events. There was no communication between hosts and guests except for the fact of the cancellations, although some of the guests indicated their intention to return after tourism had returned to normal. '*I reckon it's utterly unpredictable*' (hosting team, female, 46 yrs.).

Strategies for coping with the difficulties were manifold: some of the apartments were offered to people working in healthcare, while others considering leasing apartments to university students. Some of the hosts decided to do timely renovations. A significant number of people who work with Airbnb no longer have regular jobs, so they had to find alternative solutions for making a living, or use their savings until the restrictions ended. '*People whose job was letting in guests were asked to have a conversation with the boss concerning the situation. The company has stopped functioning, and he said that he counted on us returning when this whole thing is over*' (helper, male, 22 yrs.). The usual reaction was waiting for the situation to improve. Another option is long-term renting, but this is associated with its own risks.[22] A number of participants think that the epidemic will have a long-term negative effect on tourism for economic and health-related reasons, in contrast to those who think that because of the restrictions there will be a greater desire for travelling afterwards.

Based on the online discourse of private individuals, some of them think that even if tourism returns there will be long-term consequences that will make tourism different from what

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22　'Owners aren't interested in long-term renting, especially not cheaply, because after doing this they can hardly get rid of tenants who have the right of tenancy. It is better and also associated with less risk to keep the flat empty: this way the costs are also lower' (online comment from Facebook).

it was before.[23, 24] Almost every participant had heard about Airbnb's COVID-19 regulations[25] since the situation had affected every position. Some of the interviewees think that Airbnb's COVID-19 regulations are not fair to hosts because they could no longer make any money and that they should get some form of reimbursement, while many other participants say that Airbnb is not their primary source of income. Those who were able to afford it paid some money to their workers, and a small number of interviewees even took out a loan to cover their expenses.

During the pandemic, largely because of the closed borders, almost none of the Airbnb hosts were able to provide their services the way they did before coronavirus. It seems that the two main options were either giving up on their Airbnb activities, or finding alternative ways to utilize their apartments. Empty apartments offered a wide range of possibilities. One remarkable example seems to have been motivated by solidarity and pure pro-social behavior: on March 14 a Facebook group was created called the *Budapest Airbnb Community for Healthcare Workers*. It aimed to meet the new demand for empty apartments. Since healthcare workers were faced not only with long working hours and working with infected people but also commuting, the amount of time they spent travelling between work and home multiplied. It seems that the following idea led to the formation of the group: *'In this situation caused by the pandemic, we want to help hospital workers not to worry about the health of their family members by making it possible for them to move away from their loved ones for the next few weeks. Members of the Airbnb community of Budapest have therefore decided to provide healthcare workers who are in direct contact with Covid patients in hospitals with free apartments'* (Budapest Airbnb Community for Healthcare Workers group description).

## 6. Summary

In our research we mainly used qualitative methods to explore the main patterns of motivation, trust, risk, and selection mechanisms associated with Airbnb. The thematic approach (based on Braun and Clarke's method; 2006) was supplemented with online discourse analysis to obtain a broader view of the discussions, especially concerning the multiple effects of the COVID-19 crisis that affected Europe from mid-March 2020 onwards.

The qualitative analysis revealed that Airbnb is perceived to be a popular form of peer-to-peer accommodation platform prevalently associated with flexible forms of working conditions. Our recruitment strategy identified the main stakeholders; namely *owners*, *hosts*, *co-hosts and managers*, and *helpers*. As far as sources of motivation are concerned, we identified earning a profit to be the primary motivating factor, but meeting new people and getting to know different cultures were also mentioned by many of our interviewees.

In Hungary, as well as in most European countries (Farmaki et al. 2020), the COVID-19 crisis and the restrictions it entailed had a paralyzing effect on the entire tourism industry as well as on Airbnb, as international border closures or limitations were deemed necessary by governments for slowing the spread of the virus. Leasing Airbnb apartments for long-term periods appeared to be a viable option for maintaining the functioning of the sector, although

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23    'Even if we successfully handle the Covid situation, distrust remains for a long time; also the withdrawal – the few tourists. The world won't be the same as it was once' (online comment on forum).

24    '[…] people aren't going to restaurants because they started to cook during the lockdown, so they don't go out to have lunch with colleagues but bring their own food to work… the market is transforming…' (online comment on article).

25    https://www.airbnb.com/help/article/2839/what-are-the-health-and-safety-requirements-for-airbnb-stays

this created new types of risks. On the basis of solidarity, empty flats in Hungary, primarily in Budapest, were offered to healthcare workers through an online Facebook group.

We may conclude that institutional trust in Airbnb somewhat weakened because of the uncertainties associated with the COVID-19 related lockdown period. Airbnb's giving reimbursements to people who had to cancel their stays was intended to preserve both institutional and interpersonal trust, and Airbnb used this means of maintaining its reputation. On the other hand, aside from formal communication, employees could not get any information about when Airbnb would restart its operations.

On the one hand, most of our interviewees displayed positive attitudes towards Airbnb, while on the other hand, based on our online discourse analysis, attitudes towards the company are mixed. One group of people saw the virus as a natural way of cutting down an overdeveloped Airbnb sector that is making life harder for local people in many ways (prices, noise, a crowded inner city). They also tended to think that Airbnb is responsible for the high prices in the housing market. In contrast, another group of people were worried about the many workers whose livelihoods are based on Airbnb. Hosts are perceived to be the 'losers' of this period, especially those whose primary source of income was derived from their Airbnb business. Most helpers lost their jobs because there were simply no guests to work for.

Reflecting on our research questions concerning trust, it can be said that interpersonal trust between guests and hosts is crucial in this area, resulting in positive experiences for hosts in many cases. We found social trust towards Airbnb to be more ambiguous, as some interviewees claimed to have some concern with regard to its effect on the housing market. Finally, distributed trust in the platform and the ratings seemed to be significant, as ratings often served as a means of predicting guests' trustworthiness.

As far as the selection mechanism of hosts is concerned, multiple grounds for subtle forms of discrimination were explored throughout the interviews, even though participants did not mention any cases of discrimination when answering the direct questions about discriminatory selection mechanisms. However, when it came to spontaneously recalling their own experiences related to their work at Airbnb, the various quotations included in this section suggest that digital discrimination exists with Airbnb Budapest.

## 7. Conclusion and discussion

In this paper we aimed to assess Airbnb from a critical point of view, and based on the empirical results we identified some of its negative aspects. We partly agree with the 'sharewashing critique' formed by Tu (2017) and Schormair (2019) in relation to Airbnb – the claim that Airbnb is much more similar to a rental agency than to a home-sharing platform; however, many of our interviewees argued that their participation was motivated by the idea of sharing, pure hospitality, and having positive intercultural experiences, etc. On the other hand, when it comes to the issue of working conditions some of our interviewees argued that this type of job has a negative effect on their private life, and certain elements of precarious working conditions were identified as well. Interestingly, dissatisfaction with working conditions tended to be mentioned by people working in higher level positions as they complained more about having to invest more time and effort into doing their jobs properly.

Finally, we make some further comments on Airbnb's anti-discrimination policy and how this issue was perceived by our interviewees, as the core idea of our research – namely, the circle of trust, risks, and discrimination – seemed to involve a vicious circle, as well as because the research question on discrimination seemed to be the most controversial one in the light

of the qualitative results of our research. Considering the company's policy, it is obvious that it does not allow any kind of discrimination or differentiation, but a significant number of the interviewees have not heard about these regulations. Apart from being aware of concrete regulations, hosts know that discrimination is not tolerated by the platform, so we could hardly have identified overt forms of discrimination. Latent forms of discrimination and negative attitudes were identified in relation to numerous nationalities and minorities. Some of the interviewees found Europeans and citizens of neighboring countries to be more likeable than other guests, especially more than people from the Middle East or the Far East. A further issue regarding the company's antidiscrimination regulations was discovered: all of the hosts we interviewed said that they are respectful to people from foreign cultures, but a few of them still made some discriminative comments when they were asked about certain cultures or the activities of people from those cultures.

Based on our empirical results, we agree with Farmaki and Kladou (2020) that even though Airbnb implements an anti-discrimination policy, latent forms of discrimination as well as unconscious biases still exist during the operation of the platform. In line with the results of the Europe-wide qualitative research carried out by Farmaki and Kladou (2020), several Budapest-based Airbnb hosts also expressed the view that excluding certain types of guests was not equivalent to discrimination; rather, it was perceived to be a necessary tactic for safeguarding property and alleviating potential risks.

To sum up, although Airbnb has created a robust system where there is theoretically no room for discrimination, our qualitative research identified certain forms of discriminatory practices in the booking practice that can be labelled digital discrimination. Also, it is important to highlight that the aim of selecting a 'trustworthy guest' may be understood as a defensive strategy from the hosts' point of view.

Thus we present a final thought that may also be taken as a recommendation concerning the future antidiscrimination policy of Airbnb: if Airbnb regulations aim to reduce bias in selection by further restricting information about future guests (and hosts), and by pushing hosts to make instant booking the preferable option, this may have the reverse effect: the lack of information may create an information gap between hosts and guests that could be perceived as an increased risk and feeling of powerlessness by the hosts. In such a case, stereotype-based selection and statistical types of discrimination may become hosts' strategies for reducing this risk. Accordingly, it seems to be important for hosts to have a certain level of freedom to pre-select potential guests based on their personal information. On the other hand, the Open Doors policy that was launched in 2016 is a promising tool for fighting discrimination in relation to other forms of peer-to-peer accommodation, and on travel platforms as well.

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## Annex A: Supplementary research materials

Table A1: *Main topics of the summary template derived from the extended interview guideline*

| |
|---|
| 1. Introduction, getting to know the interviewee |
| 2. Participation and motivation |
| 3. Jobs and working conditions<br>3.1. Please think about the period before mid-March, 2020.<br>    What activities did you participate in as the owner, the host, or as a helping person?<br>    Please think about the first half of 2020.<br>3.2. You work at Airbnb - which activities do you participate in, as owner, host or helping person? |
| 4. Selection process and potential sources of discrimination: if the interviewee uses Airbnb as a host or (also) as a guest |
| 5. Trust and risks before and during the crisis<br>    5.1. Personal trust, personal experiences<br>    5.2. Feedback<br>    5.3. Trust in general<br>    5.4. Guarantee of the platform, regulations |
| Attitudes towards Airbnb, new regulations and the sharing economy in general |

Table A2: *Follow-up guideline containing specific questions related to the COVID-19 crisis*

| | Question |
|---|---|
| 1. | What kind of changes occurred regarding the bookings?<br>Questions to ask distinctly: March-May, 2020. To what extent did cancellations and delayed bookings occur? (cancellations and delays expressed in percentages, compared with the previous year's similar season and the general cancellation rate) |
| 2. | Do cancellations have any typical characteristics? (E.g. nationality, number and compound of tourists like solo travelers vs families vs. groups of people coming to have fun.) Do people cancel their bookings only a few weeks, or several months earlier? What was the furthest cancellation in the future? |
| 3. | Who are the remaining persons (who do not cancel their bookings)? To what extent did the number of guests change during the January--February-March-April period? What are the characteristics of the changes and the most typical reasons given for them? |
| 4. | Do people communicate apart from the fact of cancelling? If the answer is yes, what reasons are mentioned besides coronavirus and travelling limitations? (E.g. Did cancellations occur in significant numbers before travel limitations referring to reasons unrelated to the coronavirus? Were there people who did not mention coronavirus as the reason for cancelling? |
| 5. | What are your strategies for managing this situation? (E.g. Is the apartment leased to students moving out of dormitories or to those who need to go into a 2-week quarantine because of their arrival from abroad?) Did long-term leasing (for general use or for office purposes) happen? Are you considering selling the apartment? What do you do with your increase in free time? Do you have another job or some other source of income, or are you planning to find a new one? Are you planning to do repair jobs in the apartment? How did you negotiate with the employees, employers, sub-agents? Are you a member of any Airbnb-related groups? If the answer is yes, which ones? What do these communities mean to you? Have they heard about any new initiations? |
| 6. | What do you think about the role of trust?<br>Are you afraid of a decrease in trust in the long run (in general, e.g. concerning the tourism industry, and in personal ways, e.g. concerning your Airbnb apartment). What do you consider to be a decrease in trust with regards to guests and lessees? (E.g. Are they afraid of moving into the apartment? Are they asking for extra cleaning?) |
| 7. | What do you think about how Airbnb manages the situation? Have you heard about their 'extenuating circumstances policy and the coronavirus' guideline, which was published on March 15? Subsequent to this policy, guests who cancel the booking get full reimbursement: Do you think this is fair? Moreover, hosts can cancel the booking without any sanctions, or having an impact on their Superhost classification: Do you think this is fair? |

Table A3: *Socio-demographic profile of interviewees by type of interview (2020)*

| ID | Interview type | Male/ Female | Age | Role in Airbnb | Interview date | Follow-up date | Duration |
|---|---|---|---|---|---|---|---|
| 01 | pre+post | Male | 22 | Hosting team | 26, February, 2020 | 14, April 2020. | 53+18 |
| 02 | pre+post | Female | 20 | Host | 25, February, 2020 | 06, April, 2020 | 54+28 |
| 03 | pre | Female | 40s | Host | 26, February, 2020 | - | 52 |
| 04 | pre+post | Female | 23 | Host | 21, February, 2020 | 17, April, 2020 | 48+20 |
| 05 | pre+post | Female | 51 | Primary co-host | 09, March, 2020 | 22, May, 2020 | 63+ |
| 06 | pre | Female | 45 | Host | 27, February, 2020 | 13, May, 2020 | 82+ |
| 07 | pre+post | Male | 38 | Primary co-host | October, 2019. | 23, June, 2020 | 70+50 |
| 08 | pre+post | Male | 42 | Host | 06, March, 2020 | 09, April, 2020 | 87+ |
| 09 | pre+post | Female | 55 | Host | 11, March, 2020 | 10, April, 2020 | 68+ |
| 10 | pre+post | Female | 23 | Hosting team | 31, March 2020 | 16, April 2020 | 41+22 |
| 11 | pre+post | Female | 24 | Hosting team | 27, March, 2020 | 25, April, 2020 | 41+14 |
| 12 | pre+post | Male | 22 | Host | 31, March, 2020 | 18, April, 2020 | 41+24 |
| 13 | pre | Male | 24 | Helper | 12, March, 2020 | - | 38 |
| 14 | pre+post | Female | 58 | Host | 30, March, 2020 | 02, April, 2020 | 55+33 |
| 15 | pre | Male | 24 | Host | 18, March, 2020 | - | 54 |
| 16 | extended | Male | 19 | Primary co-host | 01, April, 2020 | - | 98 |
| 17 | extended | Female | 64 | Host | 21, April, 2020 | - | 46 |
| 18 | extended | Male | 38 | Host | 27, March, 2020 | - | 116 |
| 19 | extended | Female | 29 | Host | 22, May, 2020 | - | 61 |
| 20 | extended | Female | 44 | Host | 21, May, 2020 | - | 82 |
| 21 | extended | Female | 46 | Hosting team | 23, May, 2020 | - | 71 |

## Annex B: Supplementary materials for the analysis
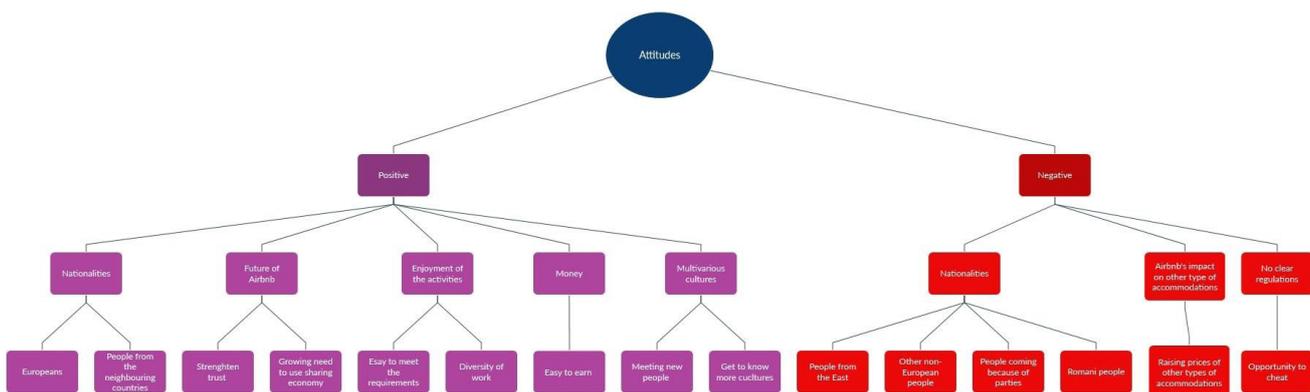


Figure B1: *Thematic tree based on 21 detailed interviews: summary*
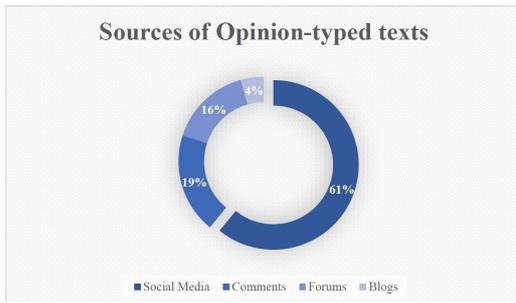
Figure B2: *Sources of opinion-type texts*
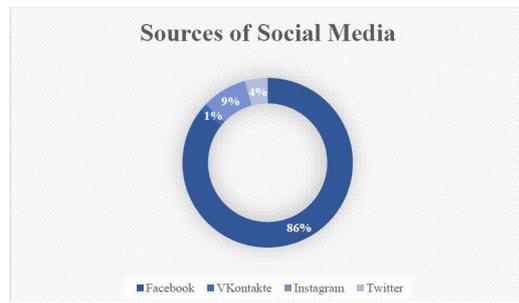


Figure B3: *Detailed sources of texts from Social Media*
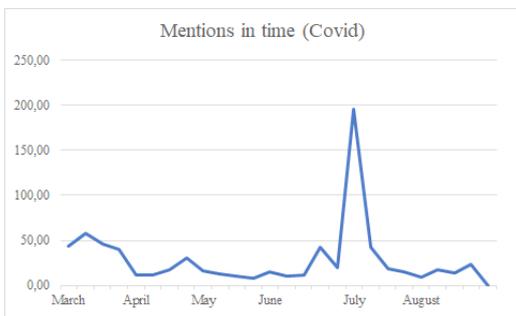


Figure B4: *Number of all mentions (Covid and Airbnb)*
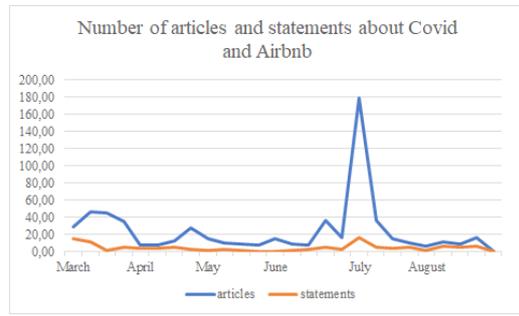


Figure B5: *Number of mentions differentiated by type of text*



Figure B6: *Keyword cloud for the top 25 keywords regarding "Covid" and "Airbnb"*

Sára Hungler & Zsuzsanna Árendás

# The level playing field of Hungarian social partners before and during the COVID-19 pandemic: Case studies from the automotive industry[*]

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## Abstract

For numerous reasons, social dialogue in Hungary generally does not fulfil its role on the national, sectoral, or workplace level. Social dialogue as a democratic process is dysfunctional, since its institutions and mechanisms are not implemented democratically, and no real dialogue or actual debate take place. Instead, these mechanisms work in a top-down manner – the illiberal state and its central governing bodies expect certain solutions and answers, leaving no scope for transparent democratic dialogue with the relevant social partners. Against this background, in 2019 major strike activity was witnessed in the automotive sector. However, in 2020, after the COVID-19 pandemic, the Hungarian government deployed its full power by adopting the 'Authorization Act,' which allowed the government to introduce significant restrictions, practically without any time limits, any debate in parliament, or guarantee of swift and effective constitutional review. Our research paper investigates these recent developments in social dialogue using a case study, with the aim of understanding the forces underlying the collective action organized in the automotive sector. Our research demonstrates that, due to the lack of institutional guarantees, social dialogue is very fragile in Hungary, and the landslide victory in 2019 was a mere reflection of labour shortages. Our mixed methodology – which combines legal and sociological approaches – is suitable for examining this complex issue; interviews conducted with representatives of labour and employers provide deep insight into motives and action in a circumvented level playing field.

**Keywords**: social dialogue; COVID-19; collective action; automotive industry; Hungary

## 1. Introduction

Involvement in decision making that affects one's life is an essential part of human dignity (Sinzheimer & Shumway, 1920). This principle should be followed in all areas of civil society, encompassing the political and economic spheres and including workplaces. Trade unions have traditionally represented the voice of workers through collective bargaining (Bogg & Novitz, 2012). Historically, industrial democracy became an effective force within the workers' movement primarily due to ideas about representative democracy (Müller-Jentsch, 1995). The principle of industrial democracy implies the replacement of unilateral regulations by joint decisions about matters concerning workplaces or employment conditions (Kahn-Freund, 1961). Thus, it is a form of socio-economic philosophy which proposes that citizenship rights in employment should allow workers to partially or completely participate in the running of an industrial or commercial organization.

Industrial relations have been subject to major transformation due to structural changes under capitalism (Boltanski & Chiapello, 2006). Because of changes in the institutional framework of the welfare state and forms of employment, individual career paths have become less predictable. These trends have made the labour market more dynamic, and have created more diverse forms of work and new jobs, requiring different skills, while they have the potential to contribute to increasing inequality and challenge time-honoured institutions. The vision of a just society has been seriously compromised and affected the material, institutional, and psychological building blocks of collective action (Lahire, 2011). However, few empirical studies have analysed collective responses to unjust treatment at workplaces in the Central-East-European (CEE) region. Our project can thus contribute to the literature on CEE labour unionization due to its analysis of the motives and the role of trade unions behind collective mobilization.

While adapting the varieties of capitalism (VoC) approach to the CEE context, Nölke and Vliegenthart (Nölke & Vliegenthart, 2009; Vliegenthart, 2010) identify a type specific to CEE that they name the dependent market economy (DME), characterized by structural dependence on foreign direct investment (FDI) that is drawn to an abundant supply of comparatively cheap and skilled labour, and by the possibility of strong hierarchical control from headquarters to local subsidiaries. As the authors state, FDI and foreign-owned bank investment are the primary sources of investment in these countries. Labour relations are typically non-conflictual, and skilled labour is mainly attracted not by extremely attractive financial conditions but through high-standard working conditions. DMEs are decentralized, while multinational companies (MNC) are typically uninterested in (or even strongly object to) getting involved in national- or sectoral-level collective bargaining (Adăscăliței & Guga, 2018). This is important to keep in mind when trying to understand the various difficulties and obstacles involved in labour organizing and collective action at various levels in Hungary. While analysing the various agencies involved in these processes (or lack thereof) on the governmental, trade union (TU), and employer side, the larger context of the political-economic context cannot be stressed enough.

## 2. Methods

We adopted a mixed-methods approach during our research, conducting qualitative interviews among union representatives and complementing it with quantitative data on TUs and media reports about union activities in the country.

The fieldwork for this article was conducted in two main stages, the first one during July–October 2019, and the second one beginning just before the outbreak of the Covid-19 epidemic, and concluding during the pandemic in the form of online or telephonic interviews. The rest of the interviews were undertaken in person in Budapest and some other major cities in Hungary. Representatives of major nationwide TUs, as well as local unionists, were interviewed. We used a semi-structured interview format, thus the main questions for the discussion were identical for all interviewees, but the latter were provided with the opportunity to answer these questions at length and adapt them to the specific situation of the organization they were representing. We interviewed representatives of two nationwide organizations, two confederation leaders, two representatives of an office in charge of a transnational TU form of collaboration, one representative of a local independent union and two local-level representatives of a large national TU (altogether nine interviews).

## 3. The employment situation in Hungary

The automotive industry generates almost 21 per cent of total exports in Hungary, making it one of the most important sectors of the national economy. There are more than 600 associated companies present in the country, employing a total of 100,000 people. Four large automotive manufacturers have production facilities in Hungary: Suzuki, Audi, Opel, and Daimler. Manufacturers' large-scale investments have attracted numerous other investments from suppliers, and small- and medium-sized local automotive companies have also become stable and strategic partners of car manufacturers. Cooperation between the representatives of the automotive sector and educational and academic institutions is strong and focuses on R&D. Numerous multinationals have set up R&D centres in Hungary, including Audi, Bosch, Knorr-Bremse, and Thyssen-Krupp.

The employment situation in Hungary can be characterized by the parallel existence of unemployment and labour shortages. While the unemployment rate was one of the lowest in the EU before the Covid outbreak, the employment rate has since been rising.[1] At first glance, the data seem to be contradictory; however, they may be explained by regulations concerning unemployment benefits: those who lost their jobs due the pandemic were unable to look for new positions and therefore were not qualified as jobseekers, thus were listed in statistics as 'inactive.'[2] (Figure 1).

Employment in Hungary continued to grow in 2019; various government measures contributed significantly to the increase in the number of people employed, such as large public work programmes and a reduction in taxes and work-related social contributions: accordingly, the employment rate of the population aged 15–74 was 70.1 per cent in 2020. By the end of 2019, employers in the primary labour market had advertised vacancies numbering 270,600 – 11.2 per cent more than in the previous year. The skilled positions most sought after by jobseekers in the private sector in 2019 were – among others – shop assistant, general office administrator, security guard, bodyguard, waiter, and cook.[3] Some of the occupations which

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1   Hungarian Central Statistical Office (https://www.ksh.hu/docs/hun/xftp/gyor/mun/mun2006.html).
2   According to the definition of Act IV of 1991 Art 54 para (9), a jobseeker is an unemployed person who is cooperating with the national authorities and actively seeking a job.
3   At the time, 42.5 per cent of all jobseekers had completed the maximum eight years of primary education, 22.7 per cent had graduated from a vocational or skilled workers' training school, another 25.9 per cent had passed the secondary school leaving examination, and 6.4 per cent held a college or university degree.
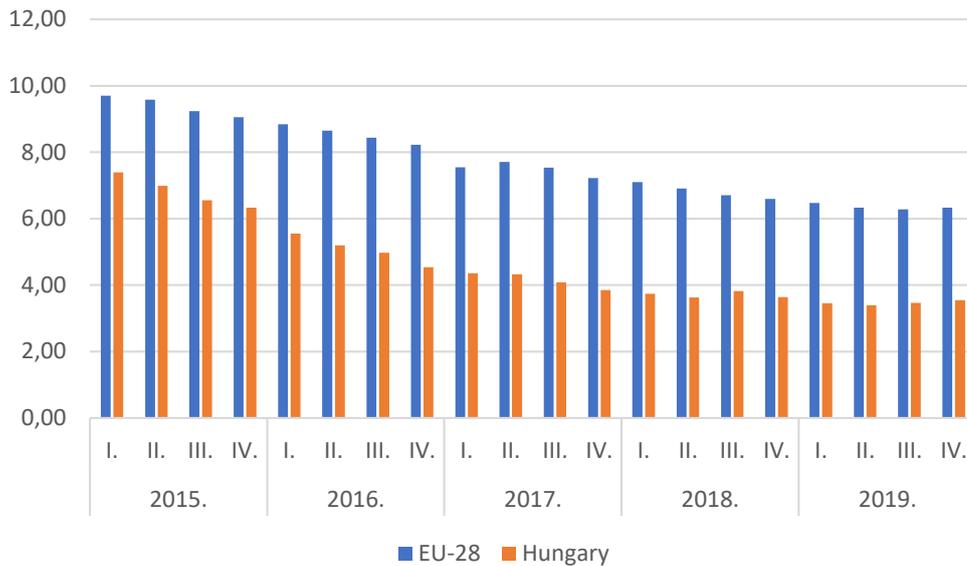
*Figure 1:* Unemployment rate [%] in Hungary and EU28; source: Hungarian Central Statistical Office, OECD.

were identified with labour shortages in Hungary were truck drivers, industrial mechanics, and construction-related labour (European Commission, 2019).

The number of vacant positions in the industrial sector is one of the highest; in this sector, the proportion of vacancies is also very large, which reveals problems with the educational system. Vocational schooling in industry is now based on a dual structure; students spend their apprenticeships obtaining particular skills that are not easily convertible to other areas. This overly narrow specification hinders labour market opportunities as employers other than those where training was completed cannot benefit from employees' knowledge. Due to the dual system, the general knowledge of students is also rather weak, and many graduates struggle with understanding basic instructions. The problems with this dual educational system were summarized by a trade union leader as follows: 'students do not leave vocational school with a profession; they are not car mechanics or locksmiths, but only skilled workers who are unable to work independently [...] this creates huge problems for employers, as people with only basic training cannot operate very expensive machines [in car manufacturing plants] and they cannot do any other jobs within the factory either' (D6.4-4). 'Low-skilled employees, therefore, hamper internal flexibility at businesses. One of the characteristics of MDEs is that MNCs are only willing to spend limited amounts on the further qualification of employees, thus highly skilled professionals are more appreciated by employers than before, and we can witness real competition to retain human resources. This competition has a certain upward effect on wages and working conditions' (D6.4-4). As a trade union leader stated before the COVID-19 outbreak, 'workers do not even need trade unions [to fight for their rights] – employers are willing to pay more voluntarily. If employees are unsatisfied with wages or employment conditions, they simply resign and move on. And with low wages and bad working conditions, an employer cannot fill the vacancies' (D6.4-6). Another trade union leader mentioned that 'smart employers increase wages to maintain a high quality workforce that is loyal to the company. But it costs a fortune, of course, and it has to be agreed by headquarters' (D6.4-5) (Figure 2, 3).
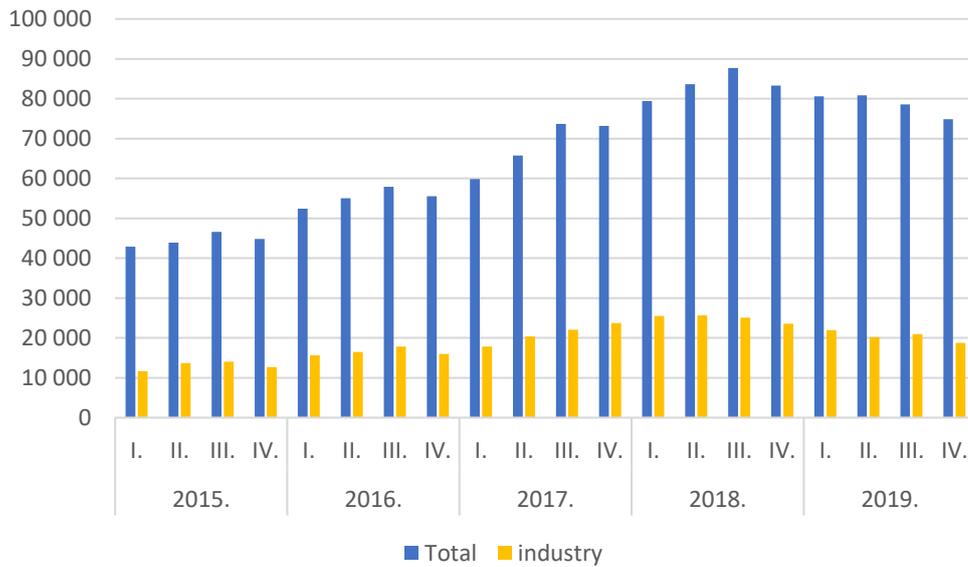
*Figure 2:* Number of vacant posts in the automotive industry compared to the total; authors' compilation based on data from the Hungarian Central Statistical Office.
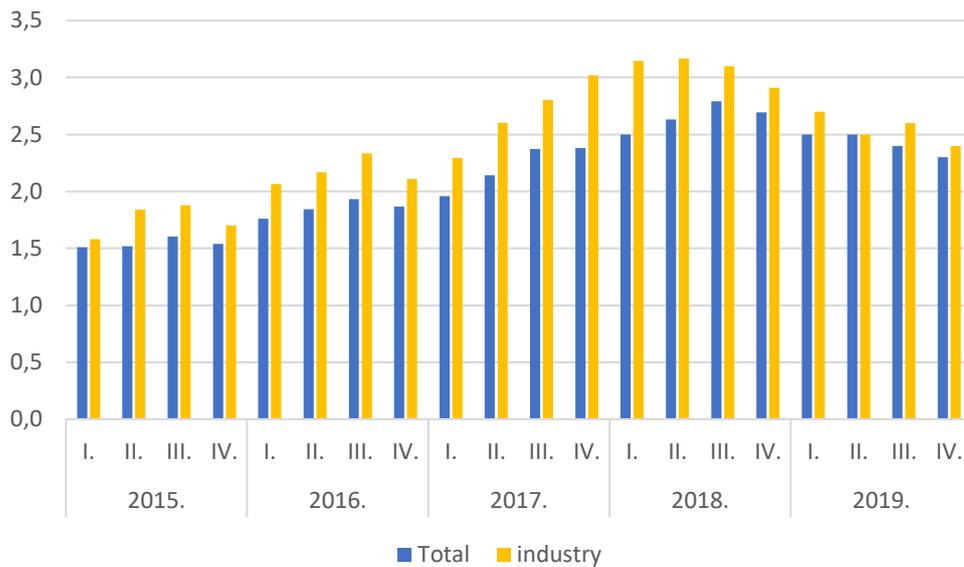


*Figure 3:* Proportion of vacancies in the automotive industry compared to the total [%]; authors' compilation based on data from the Hungarian Central Statistical Office.

## 4. Social dialogue in Hungary

The government has made great efforts to reduce the influence of social partners. Labour law reform was accompanied by the abolition of the tripartite National Interest Reconciliation Forum and drastically interventions in industrial relations. Afterwards, social dialogue as a democratic process became dysfunctional, since new institutions and mechanisms were not implemented

democratically, and no real dialogue has taken place. Instead, these mechanisms work in a top-down manner; the illiberal state and its central governing bodies expect certain solutions and answers, leaving no scope for transparent democratic dialogue with the relevant social partners.

## 4.1 Tripartite social dialogue

After the abolition of the tripartite National Interest Reconciliation Forum in 2010, a two-tier social dialogue model emerged in Hungary. On the one hand, there is an official body which involves representatives from many different areas of society, but which operates without any government agents. On the other hand, there is an informal council that was established by the government by a civil law contract, of which only selected organizations are part (Árendás & Hungler, 2019). The common denominator of these forums is that neither of them fulfils the requirements for national-level tripartite social dialogue that are set forth by ILO Convention No 144.[4] As an interviewee noted, 'the negotiations are like window displays: we meet and talk, then nothing happens. The aim is to demonstrate to the EU that we have tripartite social dialogue in Hungary' (confederation leader; D6.4-2)

The government has effectively eliminated social partners from the employment policy-making process, which has an important spill over effect on lower levels of social dialogue as well. Instead of genuine social dialogue, the related ministries and other government agents directly negotiate with certain large (multinational) business partners. An interviewee stated that 'every single amendment of the Labour Code involves a direct demand from employers' representatives; the government takes the instructions and has parliament [where they have a two-thirds majority] vote for them' (trade union leader; D.6.5_2020-04) A good example of this is an amendment of the Labour Code adopted in December 2018 (quickly nicknamed the 'slave law').[5] The law was adopted without prior consultation with social partners through the tripartite structure and overrode the massive opposition of trade unions and a wide coalition of civil organizations and opposition parties. Demonstrations and road blockades were organized around the country. The law increased the amount of annual overtime permissible to 400 hours (from 250) and also increased the working time banking reference period to 36 months (from 12).[6] These amendments may in practice lead to the excessive vulnerability of employees and further shift the balance in favour of employers. Commentators and trade union representatives argued that the latter was a part of the government's agreement with one of the big automotive companies that had triggered a 1 billion EUR investment (even though the project has now been delayed due to the COVID-19 outbreak). Trade unions opposed the adopted changes, presenting expert arguments and appealing to political decision-makers and the public. Following adoption in parliament by government parties, in less than 48 hours over 11,000

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4    The Convention on Tripartite Consultation (International Labour Standards), 1976 (No. 144). Tripartite dialogue means that representatives of employers and employees as well as the government should participate in negotiations on an equal footing. The Convention provides that Contracting Parties undertake the duty to operate procedures which ensure effective consultation concerning matters related to the activities of the International Labour Organisation between representatives of the government, employers and workers, while employers and workers are represented on an equal footing in any bodies through which consultations are undertaken. Hungary ratified Convention C-144 in 1994 (Árendás and Hungler 2019).

5    Act No CXVI of 2018. The Minister of Innovation and Technology denied the allegations.

6    Working time flexibility is primarily ensured through implementing and allocating cumulative working time (or 'working time banking') insofar as the actual working time schedule can be adjusted to the labour force requirements of companies. If working time banking is applied, the maximum working hours (without overtime) within the banking period shall be calculated based on the standard daily working time (eight hours) and standard work patterns (five working days a week).
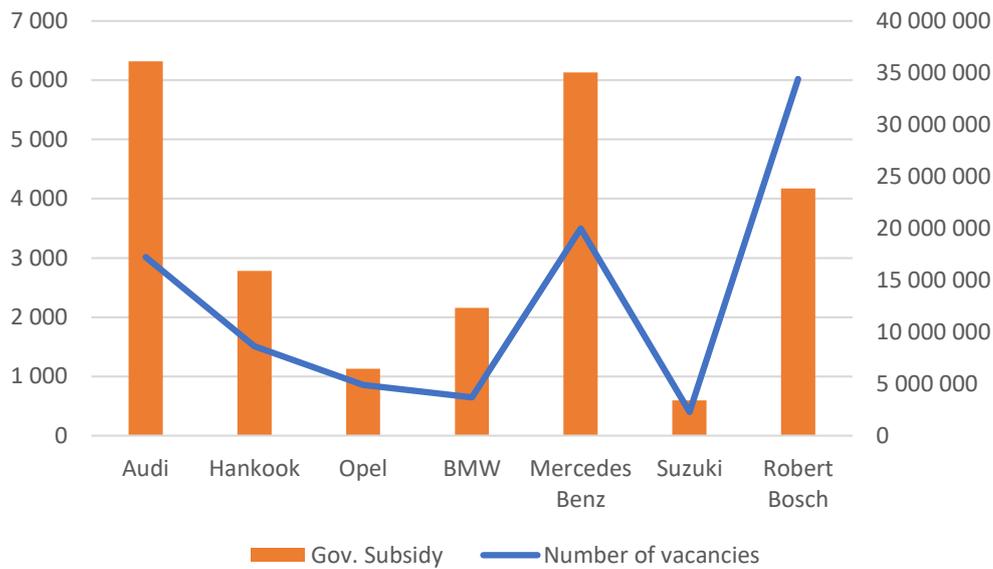
*Figure 4:* Government subsidy (in 1000 HUF) and number of vacancies created by car manufacturers between 2004 and 2020 (source: Hungarian Government, authors' compilation).[8]

| | 2020 | | 2019 | | 2018 | | 2017 | | 2016 | | 2015 | | 2014 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Gov.subsidy (1000 HUF) | Number of vacancy | Total Gov. subsidy (1000 HUF) | Total Nr. of vacancy |
| Germany | 27 673 726 | 1631 | 32 974 531 | 1667 | 34 657 187 | 3334 | 13 572 736 | 1971 | 31 217 495 | 2785 | 1 413 042 | 323 | 3 027 879 | 1028 | 144 536 596 | 12 739 |
| Hungary | 0 | 0 | 1 482 576 | 100 | 5 173 926 | 797 | 0 | 0 | 1 316 497 | 155 | 6 026 635 | 380 | 0 | 0 | 13 999 634 | 1432 |
| Other EEC | 0 | 0 | 2 877 288 | 205 | 436 848 | 115 | 2 752 493 | 367 | 0 | 0 | 2 980 211 | 850 | 0 | 0 | 9 046 840 | 1537 |
| Japan | 0 | 0 | 3 721 244 | 391 | 2 771 899 | 300 | 746 509 | 120 | 1 918 280 | 160 | 794 240 | 129 | 1 995 200 | 300 | 11 947 372 | 1400 |
| South-Korea | 121 76 610 | 697 | 769 275 | 135 | 8 174 775 | 410 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 21 120 660 | 1242 |
| USA | 0 | 0 | 1 242 411 | 220 | 0 | 0 | 4 616 099 | 800 | 0 | 0 | 0 | 0 | 761 250 | 109 | 6 619 760 | 1129 |
| Other non-EEC | 1 361 177 | 110 | 0 | 0 | 3 377 997 | 532 | 769 275 | 100 | 0 | 0 | 0 | 0 | 406 033 | 100 | 5 914 482 | 842 |
| Total | 41 211 513 | 2438 | 430 67 325 | 2718 | 54 592 632 | 5488 | 22 457 112 | 3358 | 34 452 272 | 3100 | 11 214 128 | 1682 | 6 190 362 | 1537 | 213 185 344 | 20 321 |

*Table 1:* Government subsidy (in 1000 HUF) and number of vacancies created by the country of origin of companies in the automotive sector between 2016 and 2020 (Source: Hungarian Government, authors' compilation).[9]

signatures were added to online petitions calling on the president to send the law back. None of these activities had any effect on the government or the adopted law.[7]

Another TU representative summed up their limited space for manoeuvre by referring to 2012, as marked by the introduction of the new Labour Code in Hungary and its negative effects on employees: 'In 2012, the new LC was passed, and, as a consequence, and also due to the constant amendments, employees and TUs ended up in a much worse situation. Their rights have been taken away or been infringed, and thus TUs and labour representatives have got into a very difficult situation at workplaces.'

The Hungarian government has declared certain multinational companies to be its strategic partners (see Figure 4); for example, at an opening ceremony of an Audi plant, Prime Minister Orbán highlighted that 'Hungary is today inconceivable without the presence of Audi'

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7    https://www.kormany.hu/download/c/39/d1000/EKD_tamogatas_2014-2020_HIPA.pdf

while Audi's CEO replied that the company felt 'at home' in Hungary. 8 This is not an isolated case among German businesses; international corporations have been important enablers of Orbán's illiberal turn. The government has subsidized German automotive companies much more heavily than other players in the sector, while in return these companies have created more than twice as many jobs in the past six years as their competitors (see Table 1), which goes some way towards explaining their 'vested' interest in maintaining the current legal and economic order. 'As a consequence, legal battles against MNCs have become extremely difficult to fight' (D6.5-3), summed up one of the trade unionists based at the national headquarters. The latter implicitly questioned the legal impartiality of courts, recounting how a legal decision had been made against their union in connection with a strike-related situation in one of the Hungarian automobile manufacturing plants.

> The courts in Hungary today are not suitable for giving clear declarations about the minimum-level service provision during a strike. The best example is the strike situation in M three years ago, when the court basically ruled against our union, declaring that we had not taken the necessary steps. Okay, but the problem starts with the fact that if I declare a strike forty-eight hours in advance, then management has time to change the entire shift, making our strike impossible.9 Due to the unpredictable preconditions, it is very difficult to organize a strike in Hungary nowadays.... (D6.5-5)

Under the state of emergency associated with the COVID-19 pandemic, taking such action has become simply impossible, as will be discussed below.(Figure 4, Table 1).

## 4.2 Sectoral- and enterprise-level social dialogue

The weakness of sectoral-level collective bargaining is partly attributable to historical reasons. After the regime change in 1990, large state-owned enterprises were privatized, and in the newly established market economy there was a significant share of small and medium-sized enterprises (Borbély & Neumann, 2019). Despite the establishment of Sectoral Social Dialogue Committees in 2009, social partners have shown little interest in bargaining and only a few agreements have been concluded. The employers' organizations represented in these sectoral committees employ only a small proportion of employees so the effort to create sector-wide uniform working conditions would not pay off. The economic crisis of 2008 also took its toll on sectoral bargaining, as long-term planning concerning finances and human resources became increasingly difficult for employers (Gyulavári & Kártyás, 2015). Moreover, in MDEs transnational companies do not accept a high union density or comprehensive sectoral collective agreements (Nölke & Vliegenthart, 2009). Correspondingly, sectoral social dialogue has lacked vitality and failed to become an important means of negotiation, even though the European Union has made considerable efforts to strengthen it (Gyulavári, 2018). Traditionally, the main level of bargaining takes place at the enterprise level (Borbély & Neumann, 2015), and single employers conclude over 90 per cent of collective agreements,10 although the number of collective agreements that have been concluded has significantly decreased over the past decade (Figure 5).

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8    Benner and Reinicke (2017), https://www.foreignaffairs.com/articles/europe/2017-07-27/investing-illiberalism.
9    According to the Labour Code, collective agreements can define working time schedules shorter than the statutory 96 hours.
10   National Labour Office database on collective agreements, http://mkir.gov.hu/lista2_1_3_1.php

a large trade union would be able to shape sectoral policy and would be able to conclude collective agreements that create significant change' (trade unionist; D6.5-5).

The lack of sectoral and inter-sectoral dialogue between employers and workers' organizations is explained by a TU representative as being a consequence of one-sided governmental steps that 'please' employers and do not prevent the exploitation of workers – considered a precondition of the country's competitiveness. In other words, MNCs are not forced to negotiate with each other (e.g. about maximum working hours) to retain workforce; instead, the government is approached to bend legislation in favour of the needs of large employers in local labour markets.

> You ask me why sectoral dialogue doesn't work in Hungary… Due to large automobile manufacturers such as A or B. There is no appropriate legal environment which would force them to sit together and negotiate on the meso level [i.e. sectoral social dialogue]. For instance, the upper ceiling for extra working hours could have been negotiated. What did they do instead? They [the employer] walked into the sectoral ministry, they complained about their issues, and the law was modified. They submit their orders to the government and the Faculty of Law in X, and Y's legal office start working on their request and a new law is made. That's why there is no sectoral dialogue with the TUs. They are not forced to talk to us. This is how it was before 1990, even though the situation was not as evident and strong [clearly defined] as it is now…' (trade unionist, D.6.5-2)

This tendency remains after the COVID-19 pandemic, as after the emergency situation was called off, special regulations were enacted to deal with the aftermath of the outbreak. Act LVIII of 2020 upheld the possibility for employers to unilaterally introduce a 24-month working-time banking scheme, which was one of the special provisions of the emergency labour laws.[14]

When speaking of the major barriers and opportunities to sectoral representation, as illustrated through a case study of the automobile industry, several factors need to be accounted for. The latter is a sector with significant weight and importance in the national – and global – economy (generating 10 per cent of yearly GDP in Hungary),[15] which has also been affected by the increasing labour deficit in the region. In the pre-pandemic context, the bargaining position of collective representation, including independent factory unions, works councils, and large nationwide unions spread across the metallurgy sector, was perceived to be relatively strong in terms of workers' representation. However, the fragmented landscape in the automobile (and metallurgy) sector did not help the cause, as pointed out by the different union representatives.

This fragmentation is often lamented as being the factor that prevents different pro- actors from joining forces. One of the large union's representatives, while acknowledging the need for sectoral cooperation and thus representation, admitted the lack of willingness at the top level of leadership: 'There is an increasing need for sectoral collective agreements, especially in the automobile industry. This can't take place without the XY union [names an independent union], or without ZY union [the biggest union in the sector] either; the two unions should

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14  Government Decree 104/2020 (VI.10.) on working time. Formerly, following Articles 16 and 18 of Directive 2003/88/EC on working time the reference period for working time banking longer than four months was to be decided by collective agreement (Section 94 of the Hungarian Labour Code). The newer government decree overwrote this rule.

15  Hungarian Central Statistical Office, https://www.ksh.hu/docs/hun/xstadat/xstadat_evkozi/e_oia004b.html?f-bclid=IwAR2j4Nj7AuH907i7kIs4pFfFVADl7Ltz8dChDOth3KS5C4BWhGYDqiFW5Sw.

cooperate... But unfortunately, our leadership doesn't see the need for it yet...' (an employee of an office in charge of transnational cooperation; D 6.5-1.1). As one of the union representatives pointed out, collective agreements are a regular topic of discussion. As argued on the TU side, they would be in the interest of both employers and employees, leading to more stable and reliable industrial relations. 'We have been saying for a long time that we need a multi-employer collective agreement on the enterprise level.[16] This would serve the interests both of employees and employers' (D6.5-2).

Why multi-employer agreements are not concluded in this sector is related to multiple factors: malfunctioning industrial relations on the national level, a lack of transparency on the governmental side when it comes to individual 'deals' with some of the major employers (German car manufacturers), legislation that favours employers and permits TUs minimal scope to manoeuvre. Even when the economic situation – associated with significant labour shortages emerging in different sectors of the industry – points to the good bargaining position of workers' representation, these one-off chances are not capitalized upon on a sectoral level, but only through individual deals on a plant level. A similar pattern has recently been noted with Romanian industrial relations (Vallasek & Petrovics, 2019)

Moreover, beyond the sectoral level, certain aspects of regional or transnational characteristics emerge during emblematic moments in these relations, such as during wage negotiations at the major Hungarian plants involved in automobile production. During these wage negotiations of the last two or three years, a clear CEE context has emerged, involving comparisons of Hungarian workers' wages to those paid in the plants of neighbouring countries being the basis of wage demands.

> Salaries are the highest in NN factory in a Hungarian context, but it turns out that in the XY concern they are the lowest...We work sincerely, with good quality, and still get the lowest wages. This is all what it's all about. The tension came from this, too; the factory did not want it [industrial action] to become a trend. Because last year it happened in Slovakia, or was it the Czech Republic? The Hungarians have accepted that they will never have German wages, but will not swallow the fact that the Hungarian worker is not worth a Slovak or a Czech one... (D6.5-6)

Data suggest that salaries in the CEE region indeed differ; the variation in the gross average monthly salary in the automotive industry ranges from EUR 472 in Ukraine, EUR 801 in Serbia, EUR 1,145 in Hungary, EUR 1,326 in Croatia, EUR 1,470 in Slovakia, EUR 1,561 in the Czech Republic, to EUR 1,545 in Slovenia.[17]

To add to the complexity of the picture, the automobile industry began facing labour shortages during the pre-COVID context and is undergoing a major transformation due to technology changes (related to the shift from traditional petrol-driven cars to electric ones) and due to the increase in robotization and the variation in demand for labour qualifications. The pandemic situation with lockdowns temporarily halted production lines, changed the distribution of labour, and limited the mobility of workers. Moreover, due to the govern-

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16    Multi-level collective agreements are concluded with a trade union and an employer's interest representation organization and cover all employees of the contracting employer(s); however, these are different from sectoral-level collective agreements, which are concluded by sectoral collective bargaining committees and cover the whole industry sector, not only the contracting parties' employees.

17    https://www.paylab.com/newsroom/growing-pressure-on-automotive-industry-wage-growth-in-central-and-southern-europe/50291, Hungarian Central Statistical Office, http://www.salaryexplorer.com/salary-survey.php?loc=54&loctype=1&job=10&jobtype=1.

ment's special powers to tackle the COVID-19 crisis, the government was able to unilaterally adopt measures that directly affected labour law. Employers received the right to modify work schedules that had already been announced;18 employers could unilaterally order employees to work from home or to work remotely; employers had the right to take necessary and justified measures to check the health of employees. During the state of emergency, parties were allowed to freely change labour conditions and wages by modifying labour contracts. This provision allowed for deviations from the Labour Code, including from binding legislative provisions which conferred more extensive rights and greater protection for employees, such as those related to rest periods or damages.19 It is argued, however, that this interim regulation favoured the unilateral desire of employers to modify the content of labour contracts, as the individual bargaining power of employees is rather weak. As long as the decree was in force, the provisions of collective agreements that permitted derogation from the rules set out in Section 6 could not be applied.20 Employers were also able to expand the reference period for working time banking unilaterally.21 This was another major hit to trade union rights that followed the above-mentioned 'slave act', as formerly this type of derogation was subject to collective agreement. Amendments made either unilaterally or by mutual agreement were in force until the conclusion of a period of thirty days following the end of the state of emergency. However, after the state of emergency was lifted, the law reinforced the extended reference period for working time banking and stipulated that collective agreements that regulated this issue were not applicable. Since the government provided significant financial support for the automotive industry in 2020 right after the end of the official state of emergency in order to create new jobs, these employers will probably not be keen to bargain collectively – and in the meanwhile, they will expect industrial peace to be ensured by the government.

## 5. Collective action

The right to organize a strike is guaranteed by the Basic Law of Hungary and Act No VII of 1989 on Strikes. Strikes may be organized to protect the economic and social interests of employees. Although it is a right of employees, strikes are usually organized by trade unions, while holding solidarity strikes is the exclusive competence of trade unions. The Act on Strikes was amended in 2010 to the detriment of trade unions and employees. Amendments concerning minimum service level22 created a two-tier regulatory system. In some sectors, the minimum service level is defined by statutory norms.23 In other fields, parties have to agree on the minimum service level. If their negotiations fail, the labour court defines the level following the last offer of the employer. The court process is very sluggish in practice, even though the

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18   Labour Code section 97 para (5).
19   Normally only collective agreements may lead to derogation from rules about employment relationships that are to the detriment of employees. See Art 277. of the Labour Code.
20   Government Decree No 47/2020 (III. 18.) section 6.; for the full text in English see: https://njt.hu/translated/doc/J2020R0047K_20200319_FIN.pdf; opposition politicians filed a claim at the constitutional court to abolish the decree, arguing that the unlimited scope given to employers and employees to deviate from the binding rules of the Labour Code was unconstitutional and infringed several EU regulations and directives, such as GDPR (case no. II/00887/2020): however, it is unlikely that the constitutional court will decide on the merits, as the piece of legislation questioned is no longer in force.
21   Government Decree 104/2020 (VI. 10.).
22   Businesses that carry out essential public services are required to provide a minimum level of service during strikes. No statutory norm defines the individual scope of this regulation; it is decided on a case-by-case basis by courts.
23   At the moment, two areas are covered by the law – public transport and postal services.
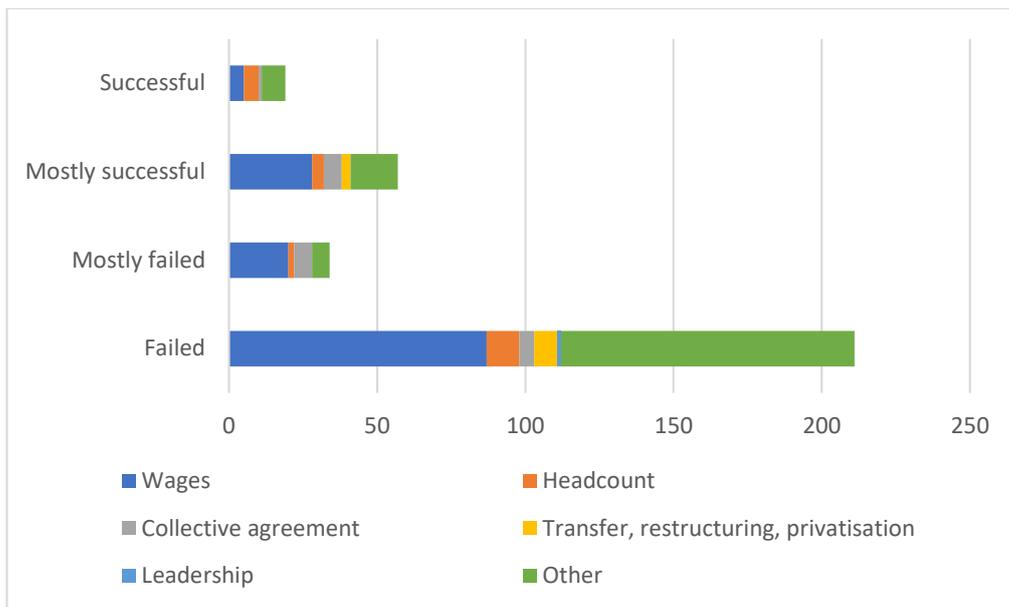
*Figure 6:* Effectiveness of collective action by type of demand; source: Berki, 2019.

law proscribes a short, five-day procedural deadline.24 In many cases, a final decision takes months, or even half a year, which makes striking meaningless, as demands become obsolete. As an interviewee explained:

> We informed the employer about our demands together with the proposed days of the strike in September 2019. The employer disagreed with our proposal, thus, the court procedure started. The formal deadline for decision making would have been 31 October 2019. When no decision was made, we filed a complaint at the end of November, but the court rejected it. The first instance decision was eventually delivered on 24 January 2020, by which the court decided that our proposal for minimum service level provision was not appropriate, as potential changes in the weather were not taken into account, and the required service level could increase in the case of bad weather. Both parties asked for a revision, and finally the second instance decision was delivered in May 2020, prohibiting the strike altogether due to the COVID-19 situation, as strikes cannot be organized if public safety and health is threatened. (D6-5-6)

No doubt, the strike would have been organized lawfully if the court decision had been rendered in time.

While the minimum service level has not been decided, a strike cannot be lawfully organized. Therefore, the newly introduced system has had a coercive psychological effect on trade unions because the burden of engaging in potentially unlawful action on organizers is overly heavy. The amendments have had a detrimental effect on the number of strikes: between 2010 and 2019 a total of 341 instances of collective action were organized, only 64 of which were strikes or warning strikes.

Due to the uncertainty about the lawfulness of collective action and the administrative burden related to the court process, civil organizations prefer to organize activities other

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24    Act CXVIII of 2017. Section 1. para (1).

than striking – mostly marches, which are governed by the act on freedom of assembly.25 These alternatives are significantly less effective than strikes. While employees' demands are rarely fulfilled completely, strikes and warning strikes are the most effective means of protest: around 60 per cent of them have led to at least partial success (Berki, 2019). (Figure 6).

Against this legal and institutional background, it was rather surprising that strike activity significantly increased in 2019. In that year, 16 strikes were organized, significantly more than the number of actions that took place in previous years. The proportion of collective action organized by trade unions has been growing: in 2019 it was 75 per cent. In 48 cases, more than one trade union took part; however, only one action was organized by a trade union confederation (Berki, 2019) (Figure 7; 8).

Data suggest that most collective action is aimed at increasing wages. Even though the national average wage grew by 81 per cent between 2010 and 2019,[26] it is not evenly distributed among workers. The statutory minimum wage has increased year by year; however, it does not have an upward effect on the whole wage structure. Experts suggest that about half of the active population earn less than average, and about 1.1 million workers are on minimum wage, which is approximately 24 per cent of all employed people[27] (Berki, 2019, pp. 7-8). This unevenness creates huge tension between workers, especially in situations when due to labour shortages employers need to hire new staff for significantly higher wages than those of employees who have a longer period of service. Labour shortages have become a severe problem for employers in the past few years as it is estimated that about 400,000 qualified workers have left Hungary to work abroad. To handle this challenge, third-country nationals have been increasingly hired – mostly from Ukraine, Serbia, and Mongolia. However, due to cultural differences and hidden costs such as travel and housing allowances, this solution does not in many cases solve the problem but creates new ones. As a trade union leader claimed: 'employees [from third countries] who work for our suppliers make a lot of waste [...] even if they are a lot cheaper than locals, it [this approach] is a dead-end [...] and there are many cultural problems with them too' (interview with a local TU representative; D 6.5-3).

Against this background, the automotive sector was hit by a wave of strike action in 2019. In January, the internal trade union at the Audi plant in Győr (AHFSZ) called for a strike that paralyzed not only the Hungarian but the German production site as well. After the 156-hour strike, which was the longest one since the 1990s, AHFSZ partially achieved their demand for an increase in wages. When production in several European locations was also threatened, the carmaker agreed to an 18 per cent increase in wages.[28]

In March 2019, workers at Korean tire maker Hankook's plant in Dunaújváros, central Hungary, started a strike over remuneration that was supported by more than 80 per cent of workers. Hankook's management flatly rejected the trade union's demands and strongly harassed and intimidated strikers, then offered 50 per cent wage increases for those who broke the strike. A lack of good faith bargaining led to a two-hour warning strike on 6 March that caused the company to increase pay by 13.6 per cent; however that increase was awarded without direct discussion with the union. A full strike began on 12 March, involving demands for a higher and more evenly distributed increase to pay and benefits, and lasted for 10 days. Strikers received wide solidarity support from unions in Hungary and abroad. The overall

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25    Act no. LV of 2018 on freedom of assembly.
26    Central Statistical Office of Hungary: https://www.ksh.hu/docs/hun/xstadat/xstadat_hosszu/h_qli001.html.
27    Central Statistical Office, Hungary: https://www.ksh.hu/docs/hun/xftp/gyor/fog/fog1906.html
28    https://www.reuters.com/article/us-audi-hungary-strike/audis-hungarian-workers-end-one-week-strike-trade-union-idUSKCN1PO2D0
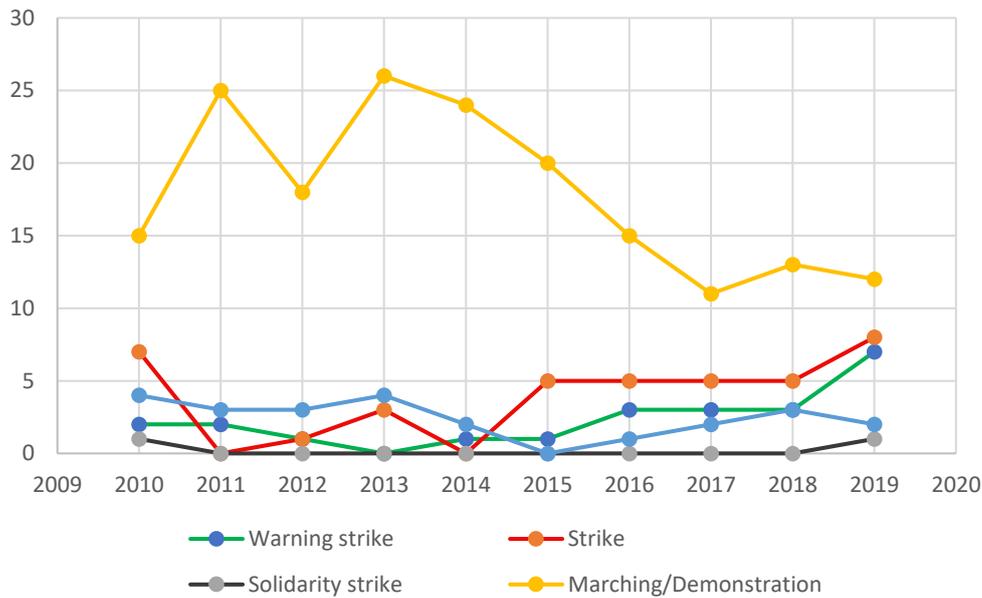
*Figure 7:* Number of collective actions by type of action; source: Berki, 2019.
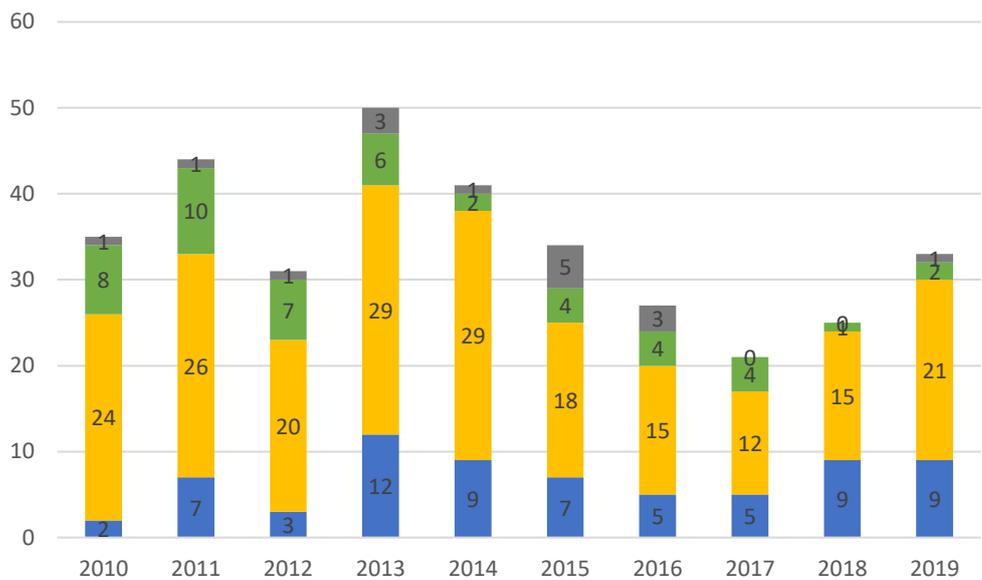


*Figure 8:* Number of collective actions by organizers; source: Berki, 2019.

gains successfully negotiated for workers combine different improvements that add up to an average of an 18.5 per cent increase.[29] In Kecskemét, workers at the Daimler plant won an increase in wages of over 20 per cent. At Mercedes, a two-year wage agreement was concluded following long negotiations between trade unions (the Union of Metal Workers and the Free

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29  The settlement included a 6 per cent increase in the shift allowance for all, improvements in the annual personal bonus, a raise in the seniority loyalty bonus, and a fairer distribution of wage increases. http://www.industriall-union.org/vdsz-historic-hungarian-hankook-strike-settled-with-major-gains.

Trade Union of Engineers and Technicians) with the employer increasing the basic salary by 35 per cent over two years.[30]

Interestingly, even though tension was very high, employers refused to negotiate with trade unions or employee representatives in most cases, clearly demonstrating the spill-over effect of the national-level social dialogue. At the Hankook plant, instead of bargaining employers provided unilaterally created wage schemes for employees that were at first rejected by the trade union. Audi's local management also delayed negotiations until the Hungarian strike started affecting production in Germany, which resulted in one of the longest work stoppages of the past 30 years.

Employees and trade unions were not only very determined to win higher wages, but in certain cases the latter created a solidarity fund to pay social aid to those who were on strike and therefore would not receive wages for those days when work was stopped. Partially due to this, trade union membership significantly increased during the strikes; for example, the number of members of the independent trade union at Audi increased to 9,300 from 8,700.[31] The sudden increase in organizational membership gave high hope to certain trade unions and a wave of mobilization started in the metallurgical sector right after the successful Audi and Hankook strikes. On the one hand, the successful strikes sent an alarm signal to other TNCs. Some of the big players willingly engaged in bargaining with trade unions to avoid strikes; successful wage negotiations were reported at Robert Bosch and Mercedes-Benz factories. On the other hand, some players in the sector did not change their strategy and successfully continued to reject negotiations, despite the strike threat; no collective bargaining took place at Starters E-Components Generators Automotive Hungary or Thyssen-Krupp, even though workers are organized by the same union which achieved a good deal at Hankook.[32] The toughest situation arose at the Suzuki plant, where the trade union leader was dismissed with immediate effect, and the management announced a new wage scheme that bypassed the trade union.[33]

It is agreed that demands for representation are more or less present, although some TU representatives admitted that the specific scenario of a labour shortage before the pandemic was a natural law of business that worked for employees (Hepple, 2005). If labour conditions are not sufficiently good, and salaries are too low, workers can just walk away. Even if new labour is hired in their place, the qualifications of the latter will typically be inferior, leading to negative impacts on production and quality, thus replacing staff does not make economic sense for employers. This was roughly the logic in the case of the two major strikes in the automobile industry in 2019 and the foundation of workers' bargaining power, and ultimately, the satisfaction of their demands.

## 6. An alternative to collective bargaining: Third-country nationals as temporary agency workers

It is often reported that employers try to prevent the raising of salaries and get away with poor working conditions by employing subcontracted labour or third-country nationals. Subcon-

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30   News release: https://fr.reuters.com/article/idUKKBN13J1CO

31   News release: https://partizan.merce.hu/2020/05/01/suzuki-szakszervezet-eltiprasa-tortenet-kirugtak-parti-zan-dokumentumfilm/.

32   News release: https://www.napi.hu/magyar_vallalatok/no_a_feszultseg_a_magyar_bosch-nal_is_berharc_a_jarmuipari_cegeknel.677774.html.

33   News release: https://merce.hu/2020/02/26/egyoldalu-berrendezest-hajtana-vegre-suzuki-a-szakszervezet-magasabb-fizetesert-targyalna/.

tractors are typically made to bid against each other, which leads to cutbacks in salaries, as in terms of costs other components of bids are difficult to reduce.

Since Hungarian wages are still much higher than those in Ukraine or Serbia, employers – although they face many challenges – are not forced to increase domestic salaries as they can hire 'cheaper' foreign workers. This creates an additional impediment to trade unions when they fight for higher wages and better working conditions. Moreover, the above-mentioned 'slave act' provides that employees can 'voluntarily' take on extra overtime. Due to this amendment, the annual amount of overtime that is permissible has been increased from 250 hours to 400 hours.[34] Voluntary overtime is definitely more beneficial for those employees who are temporarily working away from their families, thus free time is less valuable for them than an overtime allowance.

Despite the political rhetoric of the Hungarian government, which is headstrong about preventing immigration, gentle concessions behind the scenes have been made in the area of imported foreign labour. Since 2016, the employment of third-country nationals has been considerably less bureaucratic than before: the finance minister can decide on the number of people who may be hired without a working visa. The number of third-country nationals who can be employed in Hungary is around 55–59 thousand people per calendar year.[35] However, it is estimated that the actual number of third-country workers is much higher, at around 75 thousand people.[36] These labourers or 'agency workers,'[37] typically from neighbouring non-EU countries such as Ukraine and Serbia, but more recently even from the Far East, including countries such as the Philippines, Bangladesh, India, and Mongolia, have been brought in to ease the labour demand in some sectors via agencies that recruit and 'sell' labour to specific employers. In the automobile industry, the latter agencies are typically used by sub-contractors on a temporary basis. During the COVID-19 outbreak, when production lines had to be stopped and the need for labour force subsided, they were the first to be dismissed and 'shipped back' to their respective countries.[38]

It seems from our interview data that the TUs are not very interested in organizing this foreign segment of the workforce for various reasons. First, agency workers stay only temporarily in the host country, and their loyalty toward unions (or employers) is therefore questionable; second, as they are not permanently involved in the host country's labour market, they do not constitute competition for domestic workers; third, they are difficult to organize for many reasons, such as cultural differences like the language barrier (Meszmann & Fedyuk, 2020). As one of the TU representatives put it: 'There are serious cultural problems with the Serbian, Ukrainian, and Mongolian workforce', by which the former means the additional costs and 'hidden risks' involved in employing people from abroad. 'If they [employers] don't pay the market price

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34    Labour Code (Act I of 2012), Section 2 Art. 109.

35    Announcement by the minister of finance, Official Gazette, 2019/7 (II. 14.).

36    A news release about the conference of the Hungarian Economists Society: https://index.hu/gazdasag/2020/03/05/munkaeropiac_kulfoldi_munkavallalok_munkaerohiany/. The speakers also argued that the National Bureau of Employment refuses to provide statistics about migrant workers.

37    Temporary agency employment is when a worker is employed by a temporary work agency and is then hired out to undertake work at (and under the supervision of) the user company. There is considered to be no employment relationship between the temporary agency worker and the user company, although there may be legal obligations of the user company to the temporary agency worker, especially concerning health and safety. The relevant labour contracts are of limited or unspecified duration, with no guarantee of continuation. The hiring firm pays fees to the agency, and the agency pays the employees' wages (even if the hiring company has not yet paid the agency). Flexibility for both worker and employer is a key feature of agency work.

38    News release: https://www.promenad.hu/2020/03/12/koronavirus-utazgathatnak-e-a-vasarhelyi-vendegmunkasok-es-szurik-e-oket/.

for the workforce, additional costs quickly emerge such as accommodation costs, or additional costs linked to 'special workers' [a category defined in Hungarian labour law to define employees aged over 65, people with physical challenges, women returning after maternity leave etc. ]' (D6.4-5). As the same TU representative summed it up, the main problem with 'agency workers' is their 'low level of loyalty' to the company and greater turnover (D6.4-5). One can, of course, reverse the conclusion and ask how loyal an employee should be expected to be after two or three months of agency work associated with a minimum level of job-related safety and a constant threat of being laid off at any time. Fluctuation is a consequence of such work, not a cause – it is characteristic of the vulnerable situation of 'agency workers.'[39]

Hence, it is more or less clear from these interview excerpts that large unions do not want to deal with agency workers as their situation is unstable and perhaps not worth fighting for, and also because there are still relatively few of them and they are used as a buffer in volatile production situations when the labour demand of a sector/ particular plant keeps changing rapidly. Even though the EU directive on temporary agency work[40] stipulates that Member States may provide that, under conditions that they define, temporary agency workers count when calculating the threshold above which bodies representing workers provided for by Community and national law and collective agreements are to be formed in the user undertaking in the same way as if they were workers employed directly for the same period of time by the user undertaking,[41] the Hungarian law renders that only employees directly employed are counted.[42] Therefore, trade unions ultimately protect regular, domestic workers and are not interested in putting extra effort into organizing agency workers (Benassi & Vlandas, 2016; Benassi, Dorigatti & Pannini, 2019).[43]

## 7. Transnational industrial relations

Since the 1970s, various mechanisms, processes, and institutions have appeared within the framework of the European Union to promote transnational social dialogue (Ales et al., 2006). However, many problems related to international collective bargaining remain as unresolved now as they were at the start. As Otto Kahn-Freund pointed out, industrial relations are power relations, and while most of the issues related to national industrial relations have been sorted out, they recur on the European and international level. Rojot argues that in the relationship between trade unions and employers' associations these issues are similar, regardless of their geographical location (Rojot, 2013).

The first and most important issue is related to the transmission of power, which also affects bargaining power. National and local unions are not yet ready to empower their international federations, while international federations are unable to demonstrate sufficient bar-

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39   According to the Hungarian Labour Code, agency workers can be dismissed if the user company terminates the commercial contract; their salaries do not need to be equal to those of permanent employees until the 184th day of their assignment; and their entitlement to severance payment is subject to the length of service at the last assignment (sections 2019-220 of the Labour Code).

40   Directive 2008/104/EC of the European Parliament and of the Council of 19 November 2008 on temporary agency work OJ L 327, 5.12.2008, p. 9–14.

41   Directive 2008/104/EC of the European Parliament and of the Council of 19 November 2008 on temporary agency work; Article 7.2.

42   Labour Code section 276 para (2) point a).

43   Although it is a general trend in Europe, it is noteworthy that in Germany collective agreements have been concluded about agency work in the metalworking sector, where labor is strong and united (see Jaehrling, Wagner & Weinkopf, 2016).

gaining power. Had they been able to build up enough bargaining power, there would have been memorable international collective actions, such as strikes or boycotts – Rojot states. On the employers' side, it is argued that management has no power to control its entire network of subcontractors and cannot influence decision making related to the workplace further down the supply chain. These power-related issues are strongly connected to the question of legitimacy. If bargaining were eventually to take place, it would be difficult to clarify who should bargain and for which constituency. Both trade unions and employers' associations are divided by national, political, and industrial interests; therefore, it is always doubtful whether an organization can sincerely represent another one during negotiations. This ideological division can be seen in the case of Hungary.

A further problem raised by transnational collective bargaining is the enforceability of transnational company agreements. Enforcement may be broken down into three interconnected issues. The first is that transnational company agreements are generally not legally binding. Based on national law, they could be treated as valid agreements; however, there are quite different traditions of industrial relations across Europe concerning the legal characteristics of agreements, especially collective agreements (Schiek, 2005).[44] Second, to this day there is no international forum at which transnational company agreements may be contested. Furthermore, third, there is no legal international remedy.

Although to date there have been relatively few examples of complaints concerning international framework agreements, in January 2019 IndustriALL[45] suspended its global declaration on social rights and industrial relations at automotive company Volkswagen for the reason that the enterprise refused to allow workers at one of its plants in the United States to join a union.[46] This example demonstrates that any complaints that are raised are often related to breaches in the provisions of agreements on freedom of association and the right to collective bargaining. Since these agreements serve to promote key features of the respective national models of social partnership and cooperative industrial relations, they are more relevant to companies that have headquarters located in social market economies where collective interest representation is the basis for the regulation of work and the labour market. It is therefore not surprising that the spread of framework agreements has so far remained quite limited among transnational enterprises. Accordingly, the voluntary nature and the lack of remedy seriously question the actual impact of international framework agreements.

Cross-border collective bargaining emerged with the European Monetary Union (EMU) to avoid a race to the bottom in wages due to international competitiveness. The creation of the EMU and the requirements and constraints regarding the coordination of collective bargaining can be seen as the main driver for developing wage coordination at the EU level (European Parliament, 2011).

Absent of any European legislation, TCB has continued to develop in a legal vacuum. The spontaneous forces that have emerged, however, have been more beneficial for management than labour (Senatori, 2013). This may be explained by the power asymmetry between labour and management, as most of these transnational negotiations happened in the shadow of the economic crisis when job losses were at stake (European Parliament, 2013). Workers were played off against each other, and forced to agree to accept lower wages and detrimental

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44   For example, in the UK a collective agreement is assumed to be voluntary and not legally binding unless it is set out in writing and contains a statement that the parties intend it to be of legal effect.

45   IndustriALL Global Union represents 50 million workers in 140 countries in the mining, energy, and manufacturing sectors.

46   http://www.industriall-union.org/industriall-suspends-global-agreement-with-volkswagen

working conditions. Employee representatives, such as trade unions and European Works Councils, were forced to reframe their traditional sets of goals and redefine collective interests, shaped around a pluralistic notion of solidarity (Sciarra, 2010). Globalization has not empowered workers and trade unions as much as MNCs have benefited from it. As trade unions are usually constrained by their national laws, instead of seeking international partnerships they have no other choice but to follow a nationalist-protectionist strategy (Kagnicioglu, 2013).

A different type of logic was represented by a Hungarian TU representative who argued that the interests of the German and Hungarian workers coincide, inasmuch as the earlier achievements of German trade unionism now need to be defended on the semi-peripheries of Europe where German capital tries to find cheap(er) labour under worse working conditions. If these 'double standards' are allowed by local TUs, it will have – or already has had – a negative impact on achievements regarding workers' rights in the 'mainlands' (TU representative; D 6.5-1).

> Hungarian interests are identical to German ones, as the latter ones need to be defended right here. When we fight against the precarity of the Hungarian worker when we defend wages, then our interests are the same. It is weird to say, but ultimately, we are reducing the marketability of our country, or at least we are making it into more difficult terrain. A lot of things are being tried out here by the Germans and taken back as examples of best practice to Germany. You don't want to work 35 hours a week? Okay, but I will make them work in Hungary for even 48 hours a week. I will take production there. The blackmailing potential of the company will increase this way. They will transfer some of the shifts here, and sooner or later will close down production [in Germany]. IG Metal has its basis among blue-collar, not among white-collar workers. They try to guard the basic values that were fought for 10 or 20 or 30 years ago. (employee working for the office for international cooperation at a major TU; D 6.5_2020_01)

Another TU representative was slightly more cautious about adopting the German model, pointing out the different socio-economic traditions of the two regions (Germany and Hungary) – and the cultural differences too. 'There is no footprint in front of us in the snow, and we don't know how this is going to work out – if the German practice can be transferred here, and if cultural differences can be fought against. But it seems it can work...' (D6.5-6).

Since the automobile industry has become a leading sector in several countries of the region, including in Slovakia, the Czech Republic, Poland, and Romania, it seems almost evident that a certain degree of knowledge sharing and mutual learning is taking place among the TUs in these countries, resulting in regional transnationalism. The biggest Hungarian TU in the automobile industry is part of several transnational, European-level, world-wide movements, as well as regional collaboration in the metallurgical sector. They also maintain bilateral relations with their Swedish and Danish counterparts; the latter seem to involve a lively working relationship on a day-to-day basis. The so-called *Vienna Memorandum* refers to TU cooperation between Slovak, Czech, Austrian, and German TUs, involving regular meetings and joint strategic planning. The near future, with rising economic instability and rapidly increasing unemployment rates, will definitely call for not only stronger sectoral and national industrial relations, but also for clear regional TU strategies, envisaged both from below (local unions) and from above (from pre-existing and emerging transnational structures). While in the period succeeding the economic crisis of 2008 plant-level negotiations proved to be the most effective, and often the only way of engaging in real social dialogue, the current situation needs more sectoral solidarity and solidarity beyond state borders. Fragmentation on multiple levels works against labour interests and will deepen the crisis.

## 8. Conclusions

As the Hungarian government has systematically bypassed social partners in decision-making processes, it was not surprising that emergency decrees were enacted without any form of consultation. The first state of emergency was formally lifted in mid-June 2020; however, revocation of the special powers was illusionary, leaving the authorities with enhanced powers.[47] First, a 'coronavirus protection act' adopted by parliament on 30 March enabled the cabinet to rule by decree until it decided to end the state of emergency. Second, regulations that weakened the bargaining positions of social partners remained in force; by lifting the binding power of collective agreements regarding certain issues, the government reinforced the message that social partners are unimportant and could be belittled when employment conditions are being settled. This approach further increases the power imbalance between employees and employers in the automotive industry, where wages and employment conditions have been subject to market forces rather than social dialogue. The crisis has already had an impact on the employment rate: more than 110 thousand people lost their jobs during the pandemic, and the unemployment rate had increased from 3.8 per cent to 6 per cent by June 2020. If employees are left without collective protection in times of recession, their precarity will drastically increase, deepening the social and economic crisis in the country.

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47 Even though the government eventually revoked the Enabling Act (Act LVII of 2020 and Government Decree No. 282/2020 (VI. 17.)), this unprecedented concentration of power has further weakened social dialogue and allowed the government to adopt labour market measures that bypass social partners.

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Ráchel Surányi

# Gaining trust and remaining mentally sane while working from home: The importance of employee wellbeing[1]

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## Abstract

The COVID-19 pandemic has hit us hard. It is not only difficult in terms of psychological and medical issues, but it has turned into an economic crisis as well. One of the most significant 'side effects' of the first wave was widespread remote work, which was not regular – many people had to work from home while also taking care of their loved ones (be they children or other family members, or friends). Our research – part of an EU-funded project on sustainable mobility – was carried out in the city of Szeged (Hungary) among seven companies/employers. As the project was strongly affected by the crisis, the research focused on the impact of COVID-19 and the lockdown on remote work. How did remote work affect employees' mental, physical, and social wellbeing? How did employers and employees deal with the new situation? What can we learn from this crisis regarding the relationship between remote work and mental health? To find answers to our questions, we used mixed methods, i.e., combined qualitative with quantitative methodology. This case study analyses the related difficulties and challenges from the employee point of view and sheds light on some of the good practices and measures which can be applied by other companies.

**Keywords**: mental wellbeing, remote work, organizational sociology, COVID-19, Hungary

## 1. Introduction

The COVID-19 pandemic led to a global economic and social crisis: it is not only that over one-and-a-half million people have died of the virus, and more than 72 million have been infected thus far,[2] but millions have lost their jobs and their loved ones. Many countries introduced partial or complete lockdowns during the first wave – and the crisis is not yet over. Several pieces of research (Brooks et al., 2020; Trougakos et al, 2020) have shown that the social and psychological impacts are long lasting. For example, one of the former – carried out by the ELMA Institute in six European countries with six thousand respondents – found that 58 per cent of respondents suffered from psychological symptoms which lasted longer than 15 days,

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2    This article was submitted in December 2020.

such as insomnia or other sleeping disorders, weakness, sadness, anxiety, a lack of interest, etc. (hvg.hu, 2020).

In the spring of 2020, COVID-19 reached Hungary as well, leading to a declaration of a state of emergency by the Hungarian government on 11 March. This was followed by the closure of schools: teaching continued in the digital world, and soon after kindergartens and nurseries were shut down. Regarding workplaces, the subsequent measures differed by company: while some switched completely to remote work[3] (even before the state of emergency was declared), there were many places where this was not a possibility due to administrative or data protection issues, or simply because the given platforms remained open to the public (such as shops, public transport, hospitals, etc.).

This paper focuses on the city of Szeged, where research[4] was conducted within a project called Smart Alliance for Sustainable Mobility (SASMob[5]). This EU-funded project has currently seven partners: mostly large companies and municipal and state institutions; and several potential partners (see more below). The goal of the project – among others – is to increase sustainable workplace mobility with the active cooperation of employers. Due to the COVID-19 crisis, the focus has somewhat changed: while some outputs of the project had to be postponed because most employees were not going to work at all for several months, there was an opportunity to implement a small piece of research among partners' employees about this period. From the perspective of the project, the importance of the lockdown period is that it will have a long-lasting impact on both working and mobility habits. Therefore, it is crucial to explore the outcomes and learn from good practices and challenges. The main questions – which are analysed in this paper – were:

1. How did actual and potential partners react to remote work, and how was the latter implemented?

2. How did the lockdown period affect employees' physical, mental, and social wellbeing?

3. What kind of good practices can be identified from this period?

As the research was carried out during the summer of 2020, the results refer only to the first wave of the pandemic. The goal of this paper is to contribute valuable results to the relevant literature.

## 2. Theoretical background

Maintaining the good health and mental wellbeing of employees is also in the interest of employers: fulfilling basic psychological needs is not only good for employees but can strengthen their attachment and involvement at work (see more about self-determination theory in Deci et al., 2001). When employees are more stressed and less involved, the impact can spread throughout the workplace, creating a negative workplace culture (Hellebuyck et al., 2017). Furthermore, mental wellbeing also increases work-related performance (Redekopp & Huston, 2019). Mental and medical issues can cost companies a lot; therefore, it is worth investing in improving workers' situation rather than paying for their sick leave. Since being on sick leave is due to work-related stress in 50–60 per cent of cases (Eurofound, 2012), it is responsible for a one per cent loss in the GDP of the EU. Thus, more and more workplaces are

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3    This term is used throughout the sample to refer to the situation when an employee works from home (equivalent to the widespread Hungarian term 'home office').

4    The research was carried out with the collaboration of two project partners: the University of Szeged – Faculty of Economics and Business Administration, and Mobilissimus Ltd.

5    http://sasmob-szeged.eu/en/

introducing programs centred on physical and mental health which enhance workers' psychological wellbeing. However, this is still not a mainstream approach: according to research carried out by the European Agency for Safety and Health at Work, 79 per cent of managers surveyed in 27 EU countries were affected by work-related stress and less than 30 per cent of companies were dealing with this issue (Eurofound, 2012). According to another piece of research carried out by the Gallup Institute, those employees with good wellbeing are less likely to miss work than those with poor wellbeing – even if the latter are strongly committed (Witters & Agrawal, 2010). Mental issues are difficult to talk about for many, therefore the topic is often swept under the rug. Furthermore, half of the ten leading causes of disability are mental health problems, on a global basis. Mental illnesses can affect anyone, regardless of economic status, age, gender, etc. (Harnois & Gabriel, 2000). This fact underlines the importance of mental health in general.

More recent studies related to the pandemic have stated that personality plays an important role in how one's mental health is affected by (remote) work (Wilhelm et al., 2004). Other studies have confirmed this by concluding that remote work has had both positive and negative effects on mental health (Galanti et al., 2021; Ogbonnaya, 2020). Since it is possible that many companies will introduce remote work even after the pandemic, it is of utmost important to study the potential outcomes of this.

Focusing on working parents, one study found that flexibility and a positive attitude at the workplace towards parenthood positively affect working parents' wellbeing (especially that of mothers), while offering tangible benefits has less impact (Eek & Axmon, 2013).

All this proves that mental wellbeing and health are strongly intertwined, and that workplaces must pay attention to both. At the end of this paper some good practices and policy implications are suggested that can be applied by companies to improve their employees' situation at work. While many tips, mostly by HR representatives, can already be found on the internet regarding the crisis created by COVID-19 and how to handle mental health,[6] the relevance and the additional value of this paper is that it is based on research in Hungary that inquired about such issues directly from employees both qualitatively and quantitatively.

## 3. Research method

Mixed methods were applied, wherein the qualitative phase preceded the quantitative one. A sequential exploratory model allows the researcher to embed the results of qualitative data analysis into quantitative studies and base hypotheses on them, which can then be tested (Creswell, 2003). Therefore, the first part included four focus groups, followed by the second wave, when – based on the results of the focus groups – a survey was sent out to all employees who work for the current and potential partners. In both cases, the employees were asked how remote work functioned, how they felt during the period of quarantine, and whether there were any good practices which could be introduced as new habits at work.[7]

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6    https://www.forbes.com/sites/forbescoachescouncil/2021/07/19/remote-work-and-mental-health-how-to-maximize-your-time-for-micro-self-care/?sh=550f81fe4a7b
      https://www.thepolyglotgroup.com/blog/how-remote-working-can-impact-employees-mental-health/
      https://desktime.com/blog/working-from-home-mental-health/
7    During the focus groups and in the survey we ensured anonymity for participants, and further ethical considerations were taken into account.

*3.1 Sampling and its limitations*

The population from which the sample was taken consisted of those employees who work for the project partners and who do intellectual work, which is approximately 3,500 people. Those who do manual labour had to be excluded as they did not have an opportunity to do remote work, which is the focus of this research. Unfortunately, there was no further sampling process in relation to the survey – the link was sent out to all employees by the project coordinator of the company/workplace, accompanied by several reminders. As the population cannot be considered representative, the results reflect neither the national situation, nor that of employees in Szeged. Nonetheless, some of the findings coincide with other results, and the recommendations may be found useful by any company regardless of the methodological limitations. Furthermore, while most of the research conducted thus far has focused mainly on statistics and big data, this paper utilizes qualitative data – which sometimes does not correspond with the survey results.

The sampling of the focus groups involved purposive sampling, aiming for maximum variability (Patton, 2002). In this case, it meant that – insofar as information was available – the participants were chosen according to gender, age, and family status, with a focus on co-habitants: i.e. those who stayed at home alone or with their partners or flatmates, and those who were home with their children (under age 12), as living circumstances can influence responses.

*3.2 Focus groups*

Focus-group discussions followed predefined guidelines with respect to the research questions, and all three researchers were present (one of them being the moderator, the other two observers). The discussions were 1–1.5 hours long and took place partially in the digital and partially in the offline world[8] because of the lockdown (at some companies the lockdown period was extended by mandatory remote work). As Table 1 shows, the focus groups were set up based on the company profiles. Unfortunately, not all categories were represented because of the timing (it was summertime) and the willingness to participate of the companies.

Table 1: *The sample of the focus groups*

| Company profile / Marital status | Lives alone or with partner | | Lives with children under age 12 | |
|---|---|---|---|---|
| Office workers and teachers from municipal/state institutions | 5 people | | 6 people | |
| – gender | 4 females | 1 male | 3 females | 3 males |
| National and multinational IT companies | 6 people | | 4 people | |
| – gender | 3 females | 3 males | 2 females | 2 males |

The focus groups were recorded, and the material was – individually – analysed by all three members of the research group. For the analysis, the team members agreed on a common analytical framework which they used. The results were then compared and discussed in detail.

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8    This means that some focus groups were conducted personally, while some involved online discussions with video recording.

*3.3 Survey*

The online survey was sent out to all project partners and potential partners. It was the mobility managers'[9] responsibility to send out the link to all their employees. The respective Google Form was available for five weeks. There were a total of 343 respondents. Table 2 shows the composition of the sample[10]:

Table 2: *The sample*

| Gender | | Categories/companies' profile | |
|---|---|---|---|
| Male | 44% | Municipal institution | 25% |
| Female | 56% | Education and R&D | 6% |
| Family circumstances | | Production and trade | 29% |
| Lives with children | 46% | IT & Telecommunication | 40% |
| Lives without children | 54% | | |
| Type of company/institution* | | Position | |
| National | 68% | Subordinate | 78% |
| Multinational | 32% | Team leader or manager | 22% |

* It must be added that not all respondents were aware of the company's type as in some cases it is complicated.

The data was processed with quantitative data analysis software (SPSS) by one of the team members.

## 4. Results and discussion

In the following sections, the results of the research are shared. First, a general overview is presented about the participant companies' and institutions' conditions for remote work, which is followed by a description of the changes in workload and working conditions. The third section focuses on employees' perspectives about their personal experiences, while the fourth section is a short detour about their health and lifestyles during the lockdown. The fifth section elaborates on gender roles and work-life balance, while the last one details some of the extra services which some companies offered to their employees.

*4.1. Introduction: Remote work*

In Hungary, according to research conducted by a headhunting portal (Profession.hu), one-third of all companies switched completely to remote work; 16 per cent mandated three or four days of remote work; and seven per cent allowed employees to work from home for one or two days. Furthermore, 81 per cent of the companies offered masks, disinfectants, and gloves to employees. The same research found that the bigger the company, the more likely it was that they allowed their workers to work remotely (vg.hu, 2020).

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9   The mobility managers were the project's contact persons. The project leader could keep in touch with the project partners mainly through them, and they were responsible for informing employees about the opportunities for sustainable mobility modes at the workplace.

10  Unfortunately, because of some companies' restrictions (i.e., data privacy policies), differentiation by company is not possible, thus comparisons with other data cannot be made accurately.

## Was there a possibility to work from home BEFORE the lockdown?
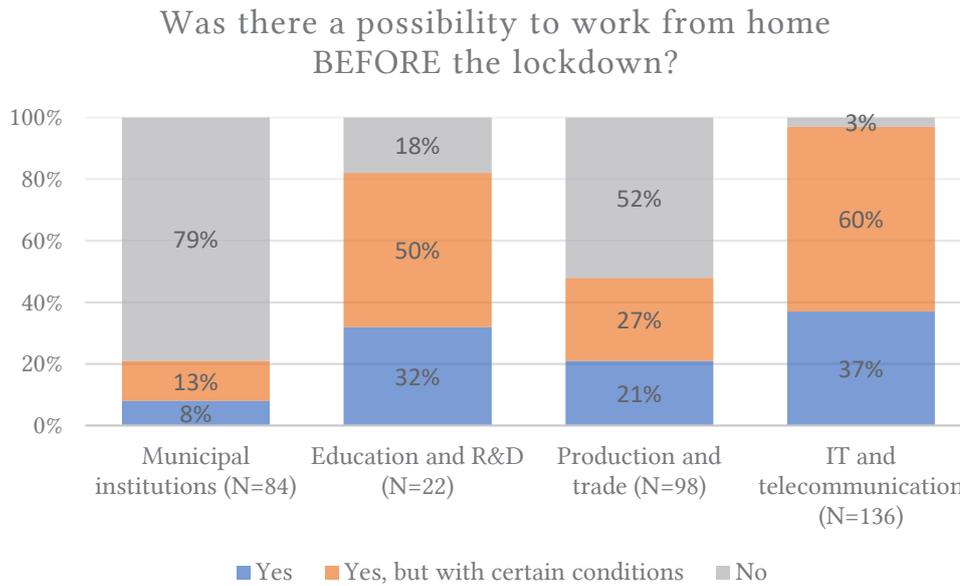


Figure 1: *Possibility of working from home before the lockdown (N=340; Chi square test < 0,001)*

## Was there a possibility to work from home DURING the lockdown?
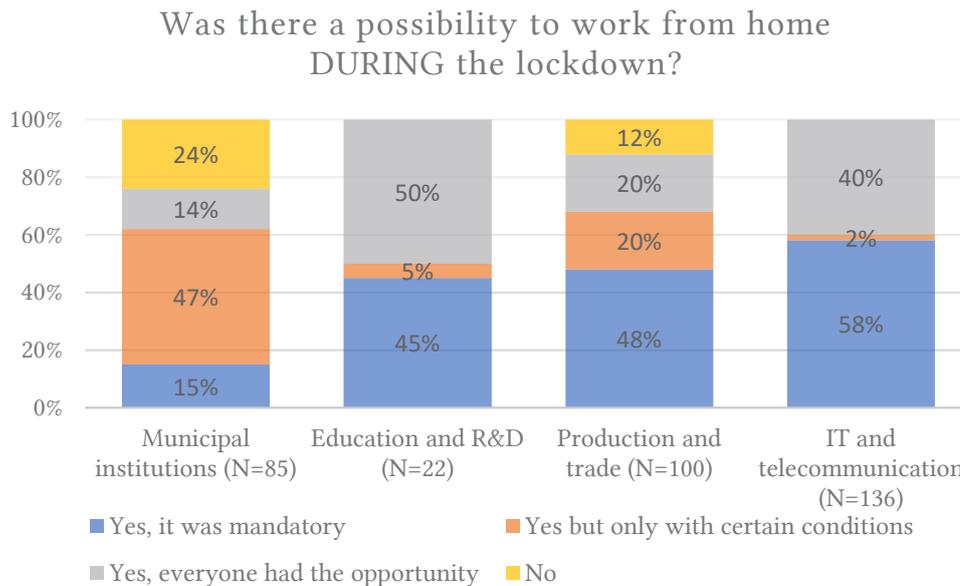


Figure 2: *Possibility of working from home during the lockdown (N=343; Chi square test < 0,001)*

Among our project partners, those employees whose work could be done from home were sent home; for others their original schedules were only slightly modified, but employers introduced the necessary hygiene-related measures to ensure their safety. The changes were introduced either in one or several steps – depending on the institution's (financial) capacity.

In terms of type of company, multinational companies are more flexible than their national counterparts: in the former remote work was more widespread even before the lockdown, and during the emergency period it was almost fully possible. While half of respondent employees at national companies/institutions reported that they could not work from home before

the lockdown, and 32 per cent could work remotely subject to certain conditions, only 7 per cent of those from multinational companies said they could not work from home, and slightly more than half (52 per cent) were able to work remotely, subject to certain conditions. In both cases, the rest had the opportunity to do so. During the lockdown, one-third of the employees of national institutions had to work remotely, while twice as many had to work from home at multinational companies. Twelve per cent of employees at national companies still did not have the possibility to work from home. The share was only 3 per cent at multinational companies. Regarding the companies' profiles, to illustrate the changes Figures 1 and 2 show whether employees had the opportunity to work from home before and during the lockdown. The rules at municipal institutions are rather strict: remote work before the lockdown was not an option: only 21 per cent of respondents said that there was the possibility to do this, but in most cases, it was subject to conditions. This changed during the lockdown, but the share of those engaged in remote work (without conditions) was still small compared to at other institutions, and the proportion of those who could work from home only subject to conditions was large. In the sphere of Education and R&D and IT & Telecommunications there was a huge difference: already permitting a high level of (conditional) remote work, these industries allowed almost everyone to work from home when necessary. Companies in the Production and Trade sector allowed more workers to work from home, but not everyone (Fig. 1, 2).

The total proportion of those companies that allowed remote work (either with conditions or without) increased from 63 per cent to 91. Due to the lockdown, conditions related to working from home were also lifted in many cases.

*4.2 Working conditions and the change in workload*

The switch from working at a workplace (be this an office or other place) to remote work was influenced by the given technological conditions. Only ten per cent of those who had the opportunity to work from home (N=311) lacked the technological conditions for this. In this case, most of them were lacking several items – a quarter lacked electronic and/or office equipment and some did not have proper VPN access. In the focus group discussions – mostly those representing the municipal institutions – many complained about lack of suitable conditions. Furthermore, several respondents had had to return to the office to obtain the necessary materials – forcing them to leave their homes, which caused internal conflict: while everybody had been advised to stay home, some people had to go to work. The real problem with this was that *'I was called in for something that I could have done from home'* (female, education & R+D). In a few cases, the necessary conditions were not ensured until the end of the quarantine period (for example, provision of laptops). In contrast, at multinational companies meeting employees' technological needs was not an issue. However, while at some companies only the basics were provided, other companies offered equipment needed for comfort (such as ergonomic chairs).

At a university, teachers were left unguided not only from a technological point of view, but also without guidance regarding methods of teaching online. One of them said *'we had widespread autonomy: [we were told to] do it the best way you can!'* (male, education & R+D). This situation is related to the issue of autonomy, which is one of the elements of Ryan and Deci's self-determination theory (2000). According to the latter authors, people have three basic psychological needs: competence, autonomy, and the need to relate to others. All three are essential for integrity and well-being. However, from the conversation with the former interviewee it became clear that the level of autonomy he had been granted was too large

and introduced too suddenly. He chose to record his lessons and upload them onto YouTube, but for some others this was too time-consuming, thus they streamed their lessons live and recorded them. The former individual added that he had also 'taught' several guest students from other universities, which implies that not all teachers were well-prepared for this period (students preferred to listen to his lectures as they were public).

Regarding effectiveness, half (53 per cent) of respondents said they were not affected, one-third said they were even more effective, and only 14 per cent said they were less effective. To include some 'mirror statistics', the above-cited research found that 57 per cent of the CEOs believed that their employees worked at the same level of effectiveness, while at larger companies this share was even larger (70). Furthermore, 18 per cent said that effectiveness had increased among workers (vg.hu, 2020). Interestingly, the answers were not correlated to whether employees were living with children. Based on the focus group discussions, taking care of one child or more was a big challenge for many. Depending on the former's age, these difficulties were related either to the switch to digital education or the constant need to be with a baby. Of course, personal and organizational circumstances counted. Apart from the age and the means of education (i.e. how independent the child was), the child's teachers and the employee's approach were also determinant.

Having a child of less than 12 years of age was also found to be a significant factor in a piece of research conducted in Hungary (Fodor et al., 2020a: 9), where perceived difficulties related to working from home were identified to be greater for those who live without children (2.6 on average on a scale from 1–5, where 5 equals 'difficult times' and 1 means that the period was 'rather beneficial'). Women found this period even harder than men (3.3 versus 2.8).

However, another important aspect was how the workplace (or rather, supervisors/management) related to their employees. One of the interviewees said that her supervisor specif-
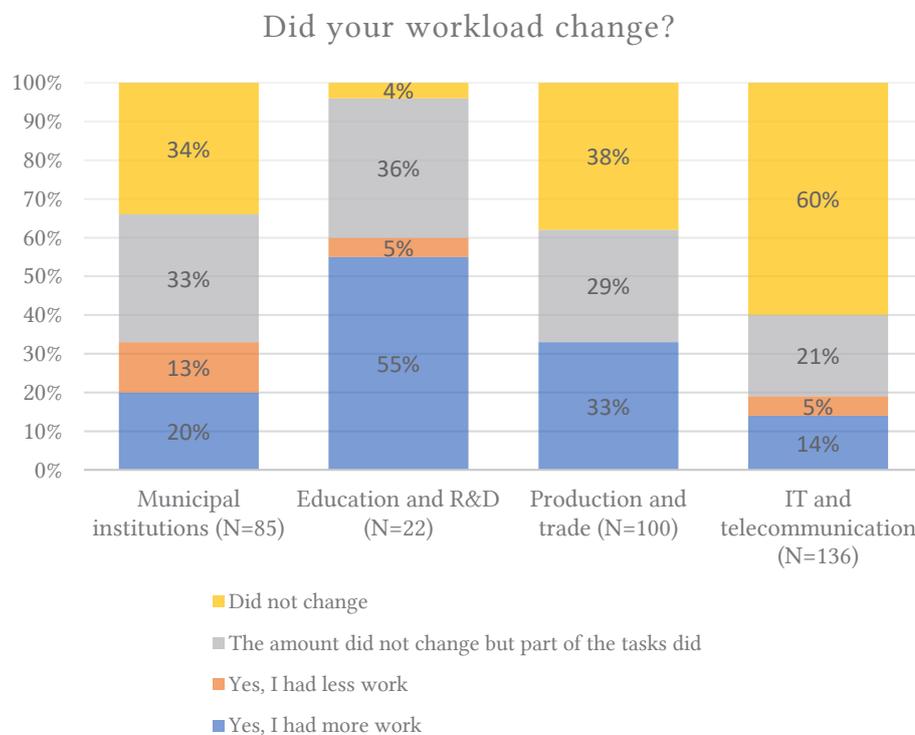


Figure 3: *Change of workload by company's profile (N=343;* Chi square test < 0,001*)*

What do you think, you worked more, less or the same amount of hours during the lockdown?
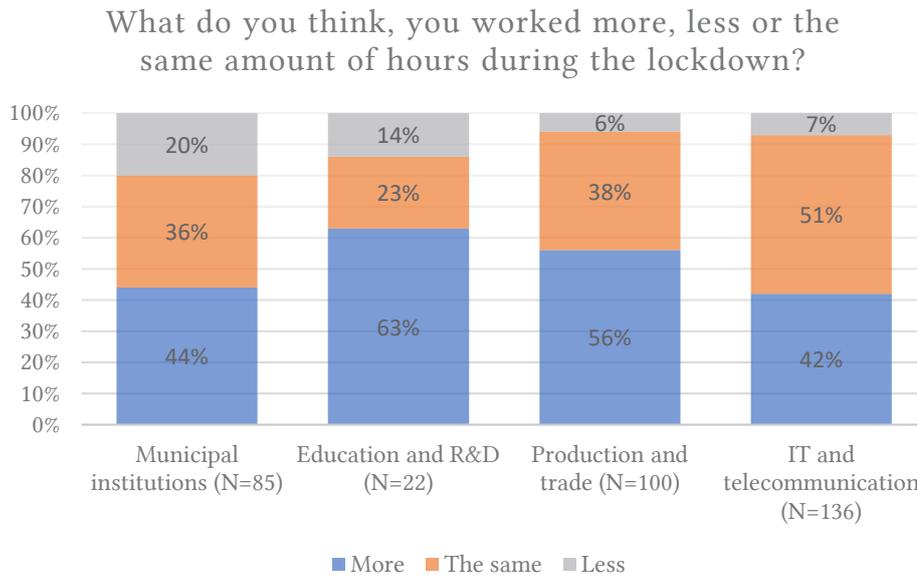


Figure 4: *The amount of work (N=343; Chi square test <0,001)*

ically emphasized that family comes first. In the survey, the respondents were asked whether there were differences between employees' opportunities and obligations: almost half of the sample (49 per cent) gave a positive answer. Of course, the differences could refer to several circumstances, but one of them may be – as it turned out from the focus groups – that parents with little children are given special attention. This phenomenon is analysed below in more detail in the discussion about maintaining work-life balance (Section 4.5).

The introduction of monitoring at work was reported by one quarter of the sample. This is also a means of limiting the perceived autonomy of employees. While the municipal institutions used this approach more often than average, in the sphere of IT & Telecommunications it was less frequent. This is related to the fact that in the former case remote work is not as widespread as in the latter, hence they are less used to this setting. Some interviewees were offended by the idea of monitoring: *'Some people think that people do not work when they work from home'* (female, education & R+D). Others considered it a good thing: they did not see monitoring as a means of checking on employees, but rather as a way of keeping in touch. There were also some who were not bothered by being monitored because this was thought to be needed to facilitate effective work. Again, permitting autonomy and having trust at work are usually very important: if an employee feels they have both, it increases their flexibility and creates a positive work ethic, which is good for both employees and the organization (Csókási et al., 2019).

According to another study, employees worked almost one hour extra on average when working from home (Gonda, 2020); this blurring of boundaries between work and family life may lead to increased stress and burn out (when working in an office, staying to work for an extra hour is more visible).

As shown in Figure 3, one quarter (24 per cent) of respondents said that they had more work, while another one quarter (27 per cent) said that their workload had not changed, but their tasks had. Breaking down the data, respondents with an IT & Telecommunication background reported no change, while employees from the Education & R+D sector had more work or had to adjust to new tasks (for example, administration for conferences had changed completely as all conferences were held online or were cancelled/postponed).

This situation is related and corresponds to the amount of work, which is shown in Figure 4. Almost half of respondents (48 per cent) worked more, and 42 per cent worked the same amount as before. The answers from respondents from the Education and R&D and Production and Trade sectors indicated more work than average, while changes were less visible in the IT & Telecommunication sector. This can be explained by the fact that at university and in companies that deal with production a lot of things changed that employees had to adjust to, while the IT sector was more prepared – although this is not to say that the latter did not have to work hard to keep up with the increasing needs of employees regarding, for example, the provision of VPNs (Fig. 4).

### 4.3 Lockdown: through the eyes of employees

To start by obtaining an objective overview, one of the questions was how the crisis had affected respondents (mostly financially) and their surroundings. Only 18 per cent of respondents answered that they were not affected and did not know anyone who was, while a large majority (65 per cent) were not affected but knew someone who had been. The latter corresponds to the findings of Fodor et al. (2020a, p. 7), according to which 70 per cent of respondents said that they felt secure regarding their work (i.e., would not lose their job).

To elaborate on subjective personal experiences, both the survey and the focus group discussions included questions about this topic. From the survey, the overall picture is very diverse: almost half of respondents (47 per cent) said the latter experience had been variable in nature, 32 per cent felt good, 14 per cent felt bad, and for 7 per cent the situation had not changed.

The lockdown period was full of challenges, and everyone reacted to it differently. Personal experience correlated significantly neither with gender, nor with family situation (whether living with children). However, from the focus group discussions it became clear that living with a child (or children) was a determining variable – of course, it depended on the child's age, education, etc. For example, an interviewee with older children (school-age) said, *'I worked very well from home, I enjoyed our big family house'* (man, IT & Telecommunication). Another interviewee with a younger child (nursery-age) reported about his reduced efficiency – therefore, he had had to put in more time. He listened to music during work – that was his way of switching off from family life. There was another interviewee whose child was studying from home under normal circumstances as well, and the whole family was 'introverted', which is why this period had not been unusual for them. She said *'well, to be honest, I heard about difficulties only from colleagues and family members'* (female, multinational company) – indicating that she and her family had had a good time at home.

Difficulties and challenges covered a wide spectrum and are illustrated in Figure 5 (these include both the items mentioned by the interviewees from the focus groups and the answers from the online questionnaire). Four categories were identified, while there were also some people according to whom there were no difficulties, but they were in the minority. The first large category included work-related problems, which included the lack of technological conditions for working, the mismanagement of remote work by the company, the lack of personal relations and interactions, and the challenge of undertaking new types of tasks (which occurred in some cases due to the new/unknown situation). The second category consisted of difficulties due to the family situation and personal wellbeing. The former included the need for home-schooling, doing household chores, insecurity, hearing depressing news, the lack of exercise and subsequent obesity, and the increase in the level of stress in general. A combi-
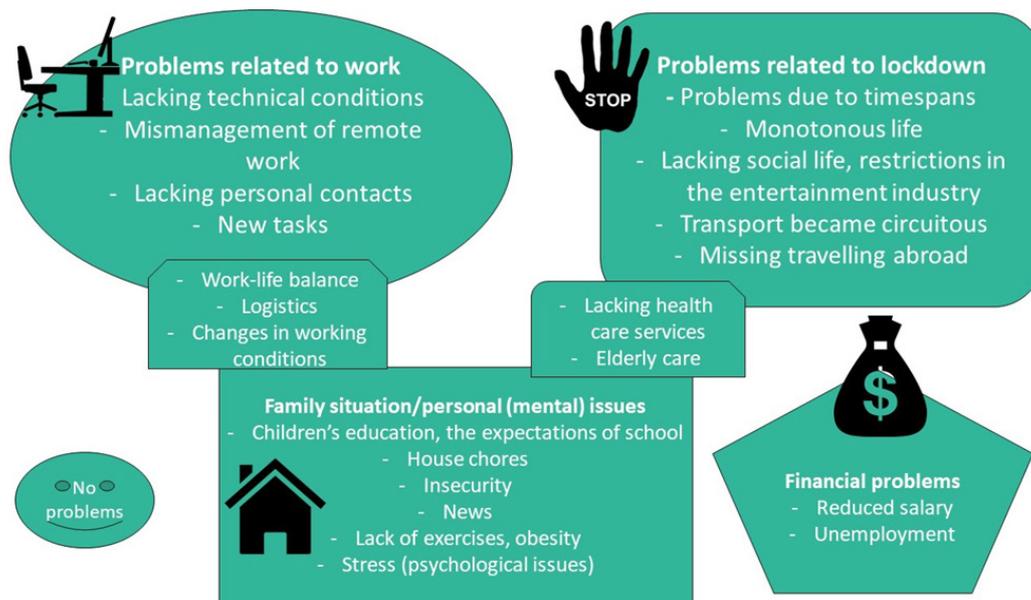
Figure 5: *Difficulties and challenges of the quarantine*

nation of the latter two categories refers to the lack of work-life balance, and the change in working conditions and logistics which respondents had to deal with. An example of the lack of work-life balance from someone who was living with her partner (with no children) was the following: *'I work the whole day, and then I do not work for the whole day: I deal with other things'* (female, education & R+D). There were other respondents for whom days had also become 'fuzzy', but they were not bothered by this overlap because their life was always like this anyway.

The third type of problem was related to the lockdown itself. Many complained about the regulations according to which only the elderly (people above 65) could do shopping between 9am and 11am. Furthermore, the lack of social life and restrictions regarding entertainment led to a monotonous life and boredom. When these problems overlapped with family-related and personal issues, complaints were about poor healthcare and caring for the elderly. The fourth category involved financial issues, such as reductions in salary or unemployment (in the family).

On the other hand, there were advantages of these critical times as well, which are summarized in Figure 6. It is visible that fewer items were mentioned here, but similarly to the disadvantages, there were four major categories: transport, family/home, financial aspects, and changes in lifestyle. The most frequently mentioned advantage was time won by not commuting. This covers several issues, such as reductions in traffic, more free time, the ability to slow down (not having to rush in the mornings), and even reduced costs (due to not having to use a car to get to work). However, due to not having to prepare in the morning, some complained that *'there was no rush, no morning traffic, but our life became fuzzy'* (female, education & R+D). Free time was not only related to respondents' own 'me-time'; some fathers were happy to spend more time with their kids due to their having to take care of them more often. One called the situation a 'family get-together'.

To cope with the difficulties and challenges, most people tried to develop some strategies which helped them get through this period. Coping strategies can be grouped into four categories: doing exercise, meditation, getting a new hobby, and creating a new daily routine or
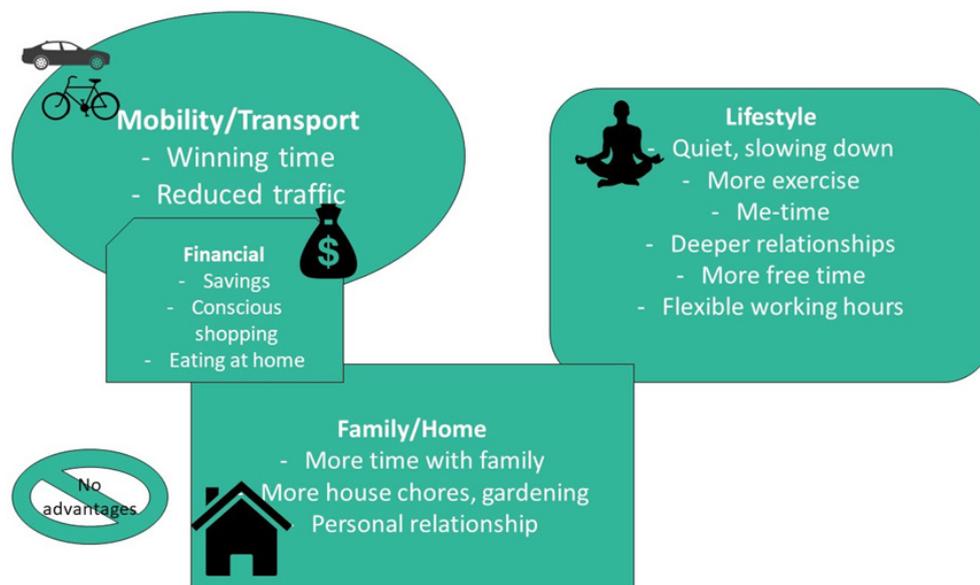
Figure 6: *Advantages of the lockdown-period*

sticking to a previous one even more. Exercises included doing yoga but biking or walking were also often mentioned (which was a mode of transport for many that replaced using public transport[11]). 'Meditation' referred to any activities which helped respondents relax (to have more 'me-time'). Among the new hobbies we identified cooking, gardening, and other activities related to the house. The category of 'daily routine' refers to imitating the office atmosphere, preparing a weekly schedule, being more with a family dog as a form of relaxation, etc. One of the interviewees said, *'I didn't have this kind of being locked in, bored-type feeling. But it depends on one's personality'* (female, municipal institution).

Both the perception of being quarantined and the coping strategies were diverse, but it is clear that (increasing the amount of) remote work – under normal circumstances – can be beneficial not only in environmental terms but good for individuals as well, and companies may benefit from this, as discussed above.

*4.4 Health and sports*

Staying mentally sane depends on one's physical health as well. Having a healthy lifestyle has a lot of components: one of them is doing exercise, while another one is maintaining a healthy diet (among many other factors). One of the difficulties (see Figure 5) for many was the fear of putting on weight. This was also identified in a small, qualitative piece of research based on memes and other social media sources (Kluzsnik & Surányi, 2020). Staying home a lot can lead to eating more and not keeping fit. One study in the UK found that both negative and positive lifestyle changes occurred during the lockdown: some people followed a more sedentary lifestyle leading to poorer physical health and lower productivity, while others became more active physically, with better health and greater productivity (Hernandez et al., 2021).

In answer to our survey, only 10 per cent of the respondents did not do any kind of exercise; 40 per cent did some daily; 34 per cent did exercise several times per week; and 16 per

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11   It is well known by now that bike traffic – because it is considered a (COVID-)safe mode of transport –increased across Europe during this period (ECF, 2020) and the trend was similar in the city of Szeged as well (see Gertheis, 2020).

cent did it more rarely. Regarding their health, 75 per cent reported no change, while 6 per cent said it had improved and for 10 per cent it had worsened because of the quarantine (the rest of the changes were not related to the lockdown).

Another factor which can affect health is the eight hours of sitting in front of a computer, which may have even worse effects at home because individuals are not necessarily forced to stand up, or may use a non-ergonomic chair, etc. One interviewee from one of the focus groups had experienced a serious incident that led to a life-threatening situation because he has been sitting in the wrong type of chair and did not stand up frequently enough during working hours. He stated that every company should pay attention to their workers by apply-ing a rule of having a regular 10-minute break per hour and reminding employees about this. This incident was a source of motivation for him to participate in the research (so that he could spread the word).

It is not by chance that one of the four strategies for coping with the lockdown situation – as mentioned above – was doing exercise. In the focus group discussions, biking – both as a mode of transport and for leisure – was mentioned frequently.

*4.5 Gender roles and work-life balance*

According to research conducted in Hungary during the first wave, men increased their con-tribution to childcare duties but at the same rate as women. This means that – because women more often dealt with childcare in absolute terms – the gap between men's and women's work-ing hours grew even further. This was typical especially among highly educated city-dwellers (Fodor et al., 2020b). Another piece of research about the preference for remote work showed that more women prefer working from home than men (Kis, 2020). This is connected to the fact that traditional gender roles are typical in Hungary – namely, the perception that men are the breadwinners while women stay home and take care of children and the household (Takács & Neményi, 2018).

Those who prefer to separate work from family and private life suffered because there was not enough space for them, but household chores and children also played a big role in their frustration. A father reported that *'household tasks distracted me from my work'*, meaning that he helped (or had to help) his wife. However, this was not always the case. The gender roles differed a lot. According to another father with older children, the moment his wife started working from home, he started going to the office because *'the goal was not to be at home at the same time. Many memes were about [showed family members at home saying] "how good! we are together, we can talk more", but I rather decreased this amount of time'* (male, IT & Telecom-munication). Yet another man was grateful for this opportunity – he said he would not have had the chance to become so close to his child if it had not been for the quarantine, when he had had to take care of the baby much more often. Another father used the expression 'family get-together' in a positive light. This shows the duality of being quarantined: some looked at it as an opportunity, while for some others it was a burden. Conflicting roles (work versus household chores and/or babysitting) were emphasized throughout the focus groups.

In responses to the survey, more than half of the respondents (55 per cent) felt that they had received enough support from their workplace and another one-fifth (19 per cent) got more than they had expected. The answers 'I received some support' (chosen by 11 per cent) includes those who might have been satisfied with their company, but not their direct supervi-sor. This is an overall positive outcome. However, if we look at the types and company profiles there were differences. At the multinational companies one-third of respondents (33 per cent)

To what extent did your workplace support you?



Figure 7: *Support from the workplace by company type and profile (N=336, Chi square test 0,003)*

received more support than they had expected, as opposed to the 11 per cent at national institutions. Looking at Figure 7, we can see that at municipal institutions satisfaction was lower than average (a total of 49 per cent received enough or more support), while in the sector of Production and Trade it was higher (84 per cent).

The participants of the focus groups from multinational companies gave very positive feedback about their workplace/management: *'The company supported its employees with everything. I am very proud of my workplace – we reacted very well [to the pandemic]'* (female, IT & Telecommunication). Flexibility on the company's side sometimes meant that even if a child was crying during a call (in the background), this was accepted. Another person said, *'I am very happy that I work in such a place, because their intention was really to help'* (female, multinational company), Employers are more likely to offer flexible conditions to higher educated mothers than fathers (Oborni, 2018), which further enhances gender/role inequalities. It is important to highlight that there was a team leader in the focus group who paid special attention to her team's wellbeing. She said that there was always one hour when everybody could be with their families, stating that there always should be one hour which is not about work. Regarding work-life balance, she added, *'it is not nice for me to say this, but one has to be able to say "no" to work'* (female, IT & Telecommunication). Apart from the requirement of paying attention to each other, she put special emphasis on trusting her team members. This kind of attitude should be dominant if we want to increase employees' wellbeing. The next section will describe the extra services which companies offered to their employees during these difficult times.

## 4.6 Extra services

To understand how the project partners tried to improve their employees' wellbeing, this was the last topic which was discussed freely in the focus group discussions. Three big categories were outlined: organized help, such as mental wellness programs; informal meetings

Was there any of the services below available at your work (online)?
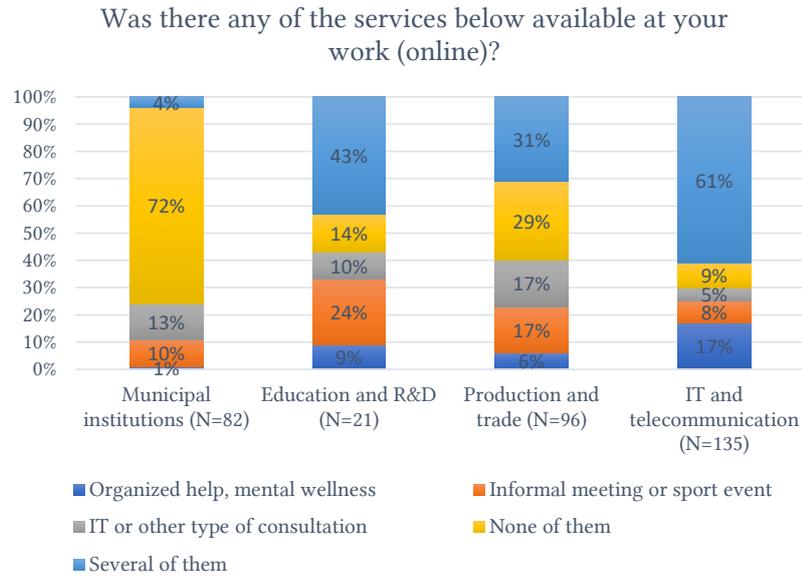


Figure 8: *Extra services' availability by company type and profile (N=334; Chi square test <0,001)*

and sport events, and IT or other types of (e.g., psychological) consultations. Benefitting from the methodological setting (i.e., having the focus groups first and then carrying out an online survey), the survey included only one question, but this time it was more targeted (we asked whether employees had had access to any or more of these services). One third (30 per cent) of the sample had had no access to any of them; for the others at least one of them had been available. If we break down the answers by company type and profile, we find significant differences. Multinational companies – as opposed to their national counterparts (16 per cent) – are more likely to offer several services (64 per cent) than average (37 per cent). As shown in Figure 8, municipal institutions are not (yet) advanced in terms of offering extra programs for improving their employees' wellbeing: 72 per cent of such respondents said they had no access to any of the listed services.

## 5. Conclusions and recommendations

Taken together, it can be concluded that the companies and institutions that took part in this research tried to adjust to the special circumstances and to help their employees as much as possible to protect their health. Even those companies at which remote work was not common tried to comply with the new situation, at least for those positions where it was possible. For those who still had to go to work, the necessary hygiene-related measures were introduced. However, national companies lag somewhat behind multinational companies in this regard: the employees of the former typically lacked a broader set of conditions that would support their full comfort and mental wellbeing. Looking at the company profiles, the IT & Telecommunication sector understandably seemed to be the most prepared in every sense, while municipal institutions were less flexible and prepared. Their technological conditions derive from their poorer financial situation (municipal institutions are highly dependent on the state), but legal regulations may have bound them further, while organizational culture is also an obstacle.

Companies/institutions had to develop or overcome their typical competences/boundaries. Remote work functions well when it is not only basic needs that are secured (i.e., adequate technological conditions, etc.), but other issues such as wellbeing and personal needs are also taken into account. However, mental wellness is not yet a commonly accepted and acknowledged need in some cases.

Switching to remote work was needed, and it turned out that it was possible even when it was considered taboo before. Table 3 summarizes all those recommendations which arose in the focus group discussions and in the survey (as the answers to an open-ended question). The recommendations – due to the special circumstances – refer not only to the pandemic situation but also to times when normalcy returns. Furthermore, as the needs of employees differ, some recommendations are contradictory (some individuals prefer personal interactions while others prefer to avoid them).

There are recommendations which concern measures related to remote work, e.g. management and the extra services which improve one's wellbeing and help to maintain a work-life balance. In the first column are included measures which are default options for some employees but are only wishes for others: instead of good practices, they are rather measures that companies should take into consideration. As not everyone has the opportunity to work from home, many simply wish to have such options (or have them without conditions). Such options should be supported by ensuring that the necessary technological conditions exist, and by overwriting (updating) data protection policies that are sometimes an obstacle to remote work. Other types of practices were finance-related: they involved supporting employees in different ways. Further, some people wish to be monitored (and for others to be monitored). In the second column, we find extra services which support individual health and mental hygiene, such as a relaxation room, doing exercise, having sports events, etc. Several of these good practices are found to be important for wellbeing. The third column contains those organizational or managerial measures that aim at improving the company's operations, such as improving communications, giving feedback to employees, organizing teambuilding activities, etc.

Table 3: *Good practices and measures*

| Measures regarding remote work | Services aiming at improving wellbeing, work-life balance | Organization, management |
|---|---|---|
| **Possibility of remote work (2-3 days weekly)** | Possibility to do sports during working hours | Teambuilding |
| **Remote work without conditions** | Sport events, health day | Feedback |
| **Utility bills to be paid (partially) by the company** | **Relaxing room** | Proper communication |
| Extra allowance for those who go to work | **Massage** | Online meetings (instead of face-to-face) |
| Monitoring | To support those who do not smoke/bike to work (with extra day off) | Company events |
| Using governmental support | Childcare services | Flexible working hours |
| Technological conditions | **Organized, wellbeing services (mental wellness)** | Electronic administration |
| To overwrite data protection policies | | |

Those with **bold** were more frequently mentioned.

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Fazila Bhimji

# Voices from the Lagers in Germany: Necropolitics in the times of the coronavirus crisis[1]

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## Abstract

This paper traces the everyday realities of refugees living in camps in certain federal states of Germany during the ongoing COVID-19 crisis. It provides a systematic analysis of refugees' testimonies and demonstrates that they have not received similar levels of care and protection as German citizens, and that their movement has become increasingly regulated. Drawing on Achille Mbembe's notion of 'necropolitics', I argue that the German State has treated refugees' lives as less liveable than those of their own citizens during the pandemic, as was the case before it broke out. Much scholarship has explained the notion of refugee camps in various ways, but there has been less discussion of *Lagers* (camps) as a site where colonial oppression persists outside the temporal and spatial contexts of former colonies. Data are drawn from archived data sets and testimonies that refugees uploaded to websites of various refugee activist groups.

**Keywords:** Refugee accommodation; Covid-19; refugee voices; necropolitics; Germany

## 1. Introduction: Containing coronavirus in Germany

This study examines the narratives of refugees' everyday realities in the *Lagers* (camps) so called in order to underline the severity of the situation, and reception centres, which they communicated to the activists and the various initiatives launched to support them. In doing so, the study demonstrates how the lives of some people who had already been racialized and 'Othered' by the German State because of their particular status and origins came to be further denigrated, dehumanized and devalued at a time when the 'indiscriminate' coronavirus was spreading and infecting humans at a significant rate. Furthermore, this article is relevant for the understanding of the political genealogy of camps in Germany during the pandemic.

According to my observations, in Berlin COVID measures were being implemented quite strictly. Almost everyone on public transport wore a mask, and it was impossible to enter shops, museums, restaurants or any indoor facility without one. Moreover, on buses the front sections were completely sealed off to shield the driver from repeated interactions with the passengers. German citizens clearly benefitted from the State's commendable health-care sys-

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tem and the efficient measures that were introduced in each of Germany's sixteen federal states, which included an efficient track and trace system and a working Corona-Warn App.

This paper will demonstrate that refugees living in the *Lagers* in some of Germany's federal states did not experience comparable levels of protection. The study based on refugees' articulations of their quotidian experience will show that they became extremely vulnerable to becoming infected by the lethal virus because the necessary protective measures were not imposed on them. During this period, refugee councils across Germany also displayed concerns about the risk of infection spreading in camps where 'frequent hand washing and social distancing were next to impossible' (MacGregor, 2020).

Several scholars have discussed and debated the regimentation of refugees in German accommodation centres prior to the global pandemic (e.g. Dilger & Dohn, 2016; Kayed & Hamann, 2018; Hartmann, 2017). During the course of the ongoing pandemic, as this study will show, the uncertainties for refugees became heightened. This paper will illustrate how the pandemic and the ill-defined quarantine regimes became a pretext for increased regimentation, securitization and isolation, leading to further mental health problems in what was already a difficult situation. In contrast, during the same period, the State appeared to be highly protective of its citizens. The following excerpt shows the State policy that went into effect at the start of the pandemic:

> On March 12, 2020 schools and childcare facilities were closed and the government issued recommendations regarding social distancing. On March 17th, the borders were closed, and on March 18th, Chancellor Angela Merkel announced the general lockdown with stay-at-home orders. 'This is serious,' she remarked in her speech to the nation. 'Please, take it seriously, too.' These measures went into effect on March 21st and were then further extended twice until the beginning of May. At the same time, the government reassured the population that they would do everything necessary to buffer the negative consequences of the lockdown. The debt brake was suspended, and the government announced an extra federal budget of 150 billion euros. Short-time work (*Kurzarbeit*) was introduced which allows firms to temporarily reduce hours worked while providing employees with income support from the state for the hours not worked. On April 22nd, the subsidy was increased to up to 80% of the regular salary. In mid-April, some states started to make the wearing of face coverings obligatory in public transportation and shops. By April 27th, face masks were obligatory in public transportation and shops in all German states. (Naumann et al, 2020)

In sharp contrast, as this study will demonstrate, the situation of people residing in Lagers across Germany's federal states remained precarious, and existing spatial distinctions and boundaries (see Kreichauf, 2018) between non-citizens and citizens were further exacerbated. When asylum-seekers first arrive in Germany, they are housed in central reception centres where they have very limited rights. Following their stay in these reception centres, they are subsequently transferred to shared or mass accommodation units in so-called *Gemeinschaftsunterkünften* or *GU* (collective accommodation centres) within a German municipality. Refugees are subsequently 'distributed' around German territory in a system called the *Erstverteilung von Asylbewerbern* (EASY), or 'Initial Distribution of Asylum-seekers'. Refugee accommodation falls under the jurisdiction of the various federal states and local authorities. In many cases, refugees are sent to remote locations, and the local authorities decide on policies regarding their movement in these areas. Federico and Hess (2021) draw attention to the fact that legal frameworks for migration and asylum diverge among 'RESPOND countries'. Consequently, the basis of the protection 'regime' differs considerably, to the extent that 'the certainty and predictability of the

law, which should guarantee protection, end up seriously undermining the right to protection' (ibid., p. 12). In Germany, refugees are required to stay at initial reception centres, and thereafter in the camps they are subject to control, confinement, and precarity since the 'legal uncertainties strengthen the discretion of authorities' (ibid., p. 14).

During the ongoing coronavirus crisis, the situation confining the refugees to these reception centres and accommodation centres has intensified. Several refugee activist groups provided support for the refugees confined in the camps, and published reports on their everyday experiences. For example, members of a feminist and migrant activist group, Women in Exile and Friends e.V., visited the *Lagers* and organized picnics with women refugees living there, who subsequently spoke to them about their situation. Another activist group, International Women's Space e.V. (IWS), contacted women living in various refugee accommodation centres and reception centres around Germany and inquired about their situations via electronic communication. Subsequently, refugee women sent them oral reports via WhatsApp, which the activist group posted as podcasts on their websites, having transcribed the information (see https://iwspace.de/corona-lager-reports/). Similarly, a refugee newspaper publication, *Daily Resistance*, published a special issue on refugees' experience during the coronavirus period in the German camps and the Moria camps in Lesbos, Greece. Another initiative, We'll Come United Berlin/Brandenburg, expressed solidarity with the refugees in their accommodation centres by visiting and supporting them with transport, bus services having been curtailed at the start of the epidemic in Germany. The initiative called this action *Aktion Supermarkt: Shuttle 'Busverbindung jetzt!'* ('Supermarket action: shuttle-bus link now!'), which supported refugees in a reception facility in Doberlug-Kirchhain by organizing a supermarket shuttle with six private cars. The group's aim was to replace the bus that had linked this camp to the city centre, but had recently been discontinued by traffic management at the beginning of the crisis. In addition to the actions undertaken by some refugee support groups in Berlin and Brandenburg, individual refugee activists also tried to make their voices heard with respect to the situation in the camps during this period.

This article therefore demonstrates how some people's lives have been made more vulnerable than those of others, since this new disease has infected people who did not have the privilege of being able to keep to social distancing, maintain hygiene or have access to appropriate medical care. Drawing on Achille Mbembe's (2019) necropolitical theory, this study shows that refugees' lives in the refugee camps appear to have been of little importance to the German State, since the latter has given those living in the camps only limited protection. Davies and Isakjee (2019) have recognized the need to extend the notion of necropolitics beyond the spatio-temporal confines of the colony. When refugees' lives are made so very vulnerable that they can be rendered subject to different rules, protection and levels of confinement within Germany during a crisis, extending the notion of necropower to them becomes even more apparent and necessary to apprehend. Speaking of 'necropower', Achille Mbembe aims 'to account for the various ways in which, in our contemporary world, weapons are deployed in the interest of maximum destruction of persons and the *creation of death-worlds*, new and unique forms of social existence in which vast populations are subjected to conditions of life conferring upon them the status of *living dead*' (2003, p. 80).

Bhambara (2017) contends that rights granted to European national citizens without being extended to others are privileges, this being how imperial inclusion based on hierarchical and racialized domination is reproduced as national or joint European exclusion, reflecting earlier forms of domination and being similarly racialized. Thus, the fact that refugees have come to be visibly excluded through the imposition of unclear, ambiguous and contradicting laws in

segregated housing during the coronavirus crisis, which gave rise to high levels of uncertainties and threat to their lives, should be understood as an example of hierarchical and racialized domination being reproduced outside the colonies and within the German State. As one refugee stated in his testimony, 'almost nothing is done to save the *death conditions* refugees are facing at the moment'.

## 2. Debating camps and shelters

There has been much discussion about the exclusionary aspects of refugee camps in nation states. Several scholars describe them as 'states of exception', closed camps, or regimented institutions (Agamben, 1998 [1995]; Pieper, 2008; Taubig, 2009; Wendel, 2013). Studies of such shelters have understood them as closed systems and have treated them and their inhabitants as anomalies, demarcated and distanced from the places in which they are located. For example, Wendel (2013) comments on the spatial restrictions placed on refugees in Germany, the federal authorities having the power to decide whether refugees may leave their districts to undertake other activities. Taubig (2009) draws parallels between the authorities' control over prison inmates and the lives of those living in refugee accommodation, and understands the living situations of asylum-seekers in Germany as a state of 'organized disintegration' marked by the existing asylum and residence structure that the federal states have created.

Scholarship has also addressed the ideological functions of refugee accommodation. Pieper (2008) understands the ideological underpinnings of the camps as spaces from which 'voluntary departures' are promoted and argues that the presence of all the facilities concerned with regulating asylum in the refugee camps become instrumental in isolating the refugees from the rest of society. Refugee camps have also been described as exclusionary, isolated and regimented spaces. Bigo (2007, p. 23) notes that detention centres are, for the most part, set up to 'defend society' from the asylum-seeker through distancing techniques, so that, for the latter, the 'possibility of staying and living inside a country not considered their own' diminishes.

Thus, much previous scholarship has understood refugee accommodation to consist of camps of exceptionality separated from citizens or as sites in which multiple state actors and forms of authority co-exist that deny the experience of self-governance to their residents. Refugee accommodation is regarded as an exceptional space, its residents consequently being understood as the victims of such exclusionary practices and as leading 'bare lives' (Agamben, 1998 [1995]).

Recently, there has been much focus on camps at 'hot spots' such as the former Moria Camp in Lesbos, Greece. Scholars working on the lived experiences of refugees regard these camps as 'anti-shelters'. Howden (2020) argues that Moria is an 'instructive microcosm of broader European border practices,' one that features 'an architecture that is the very antithesis of shelter,' being designed 'to produce a spectacle of fear, uncertainty and danger for possible migrants.' Given the poor conditions and levels of increased securitization that their residents experience, refugee camps have also been understood as deliberate forms of deterrent, with the extent to which they offer protection being questioned (Bhimji, 2019; Pallister-Wilkins, 2020; Scott-Smith, 2020). Similarly, Andrijasevic (2010), who has analysed the camps on the Italian island of Lampedusa, asserts that these should not be viewed as abstract and dematerialized 'spaces of exception'. Rather, detention within them must be seen as related to deportation, while the camps themselves should be regarded as modes of the 'temporal regulation' of transit migration.

While several scholars understand camps as confining, regulatory and closed spaces, others have argued that, even though the refugee camp may have exclusionary characteristics, those who reside in it should not always be seen as passively accepting their circumstances, but be understood instead as possessing agential abilities enabling them to resist their regimented lives and to work to normalize their everyday existences (Bhimji, 2019; Turner, 2015; Bhimji, 2016; Rygiel, 2012; Sanyal, 2011; Sigona, 2015).

Although there has been much discussion of and focus on the exclusionary politics of the camps, there has been little recognition of refugee camps as sites of colonial and racial oppression. As Davies and Isakjee (2019) have pointed out, 'in practice, the founding and continuing logic of the modern European state is one which sees European space and citizenship as a right for the "native" European, but a precious and scarcely distributed gift to those outside its political borders' (ibid., p. 215). In the context of the coronavirus crisis, the operation of this logic has become increasingly apparent. While the German State has proved to be efficient in protecting its own citizens, given the relatively low level of fatalities in comparison to other EU countries, similar levels of protection have not been provided to those already confined in the camps.

The following sections will illustrate the extent to which refugees residing in the camps became increasingly segregated, othered and racialized from German society during the coronavirus crisis and thus the need to understand camps as sites of necropolitics and necropower outside the colonial context.

## 3. Methodology

The data employed in this study are drawn from fifteen testimonies archived in the form of podcasts, online publications and websites by various refugee activist groups based in Berlin and Brandenburg. I have known these groups for over seven years and have consistently followed and participated in some of their related activist work (see Bhimji, 2020). They have earned themselves a considerable reputation for their activist work in Berlin and Brandenburg, and have also received funding from various sources to enable them to continue with their activism and advocacy work. One such group, International Women Space (IWS), which is in regular contact with women living in various refugee accommodation centres, collected over thirty testimonies of their experiences via WhatsApp audio-messages starting in April 2020. They continue to collect stories up until today. IWS consists of several working groups, one of which, called the 'Break Isolation Group' and led by migrant women, invited women staying in different refugee accommodation and reception centres to share their experiences with respect to their ongoing situation. Prior to the COVID-19 crisis, in order to collect women's testimonies, women from this sub-group had received funding to visit the *Lagers*. However, with the onset of the pandemic, they were unable to visit the camps because of increased restrictions and securitization. Nevertheless, the 'Break Isolation Group' managed to record several testimonies in the form of audio-messages, which they uploaded to their website, subsequently transcribing the interviews. The webpage is entitled 'Corona-reports: women report about their situation in the Lagers.' The group started to gather messages in April 2020, and have continued to do so up until the present day. IWS anonymized the interviews and did not reveal the identities of their respondents in either the podcasts or the transcriptions, but numbered the interview excerpts instead. For the purposes of this study, I refer to the same numbers as those used by IWS. These recordings and transcriptions of the interview data can be found at https://iwspace.de/corona-lager-reports/.

Women in Exile and Friends e.V., a Brandenburg-based activist group, also reported on women's experience at the camps on their website. The activists had organized a rally and picnics in some camps, such as that in Wünsdorf, as part of their annual summer action bus tour in Berlin and Brandenburg. At the picnic, they spoke to the women about their experiences, which they summed up and uploaded to their website:https://www.women-in-exile.net/kundgebung-und-picknick-im-wuensdorf-lager/. I also discuss excerpts from these reports in this study.

In addition to refugee women's activist groups, in August 2020 a publication called *Daily Resistance*, which publishes critical perspectives on refugees' experiences, also brought out a special issue on refugees' experience in the *Lagers* in Germany, as well as in camp Moria in Lesbos, Greece. The editors believed that it was important to do that since, because of the EU's policies, the refugees had been exposed to greater risk, were isolated, and received racist, discriminatory treatment during the epidemic (Ulu, 2020).

We'll Come United, another activist group consisting of several networks and initiatives, organized an action to provide the refugees with a taxi service following the suspension of buses at the start of the pandemic. This was the only connection between one particular camp and the city centre five kilometres away. Subsequent to their action, on 9 April 2020 the group gave a summary of the situation and their action in support of the confined refugees on their Facebook page.

This study provides an analysis of some of the reports, testimonies and narratives collected by these activists. The methodology I employ represents a departure from using quantitative data, as it draws on ethnographic methods involving interviews and participant observation. Finally, while in Germany, I also visited one of the refugee camps, at Doberlug-Kirchhain (DoKi), with an activist group. This helped me visualise and further confirm the testimonial data I employ in this study.

David Zeitlyn (2012, p. 464) argues that every ethnography, history or archive is positioned or biased in one or several ways, which still does not make archival (or any other) research worthless; rather, we must deal with the positionality or bias of the accounts. For the purposes of this study, therefore, I apprehend the complex positionality of these groups, some of whose activists are white, alongside others who are first-generation migrants from the Global South or German-born people of colour. Although the activists claim to work in solidarity with the refugees and try to form equal relationships, their positionality with respect to the refugees need to be recognized as more complex: for example, hierarchical relationships do tend to develop in situations where one group supports another group (see Bhimji, 2020). Nevertheless, the significant political role these archives play in describing the experience of refugees residing in German camps also needs to be acknowledged. Furthermore, I must take into account my own positionality as a researcher, since I have decided which reports to include and which to exclude for the purposes of this study. Thus, power imbalance exists between the researchers, activist groups and the participants whom we write about. Furthermore, the employment of archival methodology was additionally limiting because I was not able to conduct face-to-face interviews, and thus it was difficult to determine the entire ethnographic context of the situation.

The following paragraphs will provide an analysis of the testimonies and reports published by the four activist groups based in Berlin.

## 4. Analysis

### *4.1 Detention-quarantine in the camps*

Several of the refugees living in the camps felt that the state had curtailed their freedom of movement still further during the coronavirus pandemic. They did not believe that the additional restrictions had been introduced simply to protect people against this new virus, but rather regarded those as a method and an excuse for the state to increase its control and power over those who were already being confined in difficult circumstances. A number of respondents mentioned that some states had re-imposed the *Residenzpflicht*, a law in Germany which restricts the movement of refugees within the state. According to this provision of the Asylum Act (Section 56), asylum-seekers and those staying in Germany on *Duldung* (deportation postponed until the obstacles for deportation—e.g., a severe disease, lack of papers, pregnancy, etc.—are out of the way) may only move within the federal state or residence area assigned to them. The residence obligation applies to asylum-seekers as long as they are being accommodated in a country-run initial reception centre for up to six months. For asylum-seekers who are from what are deemed to be 'safe countries of origin', the residence obligation applies until their application for asylum has been processed. In the case of the 'tolerated', the restriction on geographical residence can be lifted after three months. Over time, following much activism and resistance, this apartheid-like law segregating asylum-seekers from citizens had been relaxed, though some states have reimposed it during the pandemic, subjecting asylum-seekers to even more segregation by severely restricting their mobility. The following excerpts illustrate the ways in which the state restricted the movement of those living in camps:

> Report No 17: …And then the insurance cards were closed, they blocked the insurance card, so that you can only stay in Neuruppin and go to hospital in Neuruppin. People are very, very worried. Then they wrote that women who have children, they could go to [the] *Frauenhaus*, the Women's Place to stay for the time being, until they find a solution. There is no solution. People are worried. (IWS,13/05/2020)

> Report No. 6: I went there [to Treskow in Neuruppin] personally to visit a Cameroonian woman with two children. She called me and I was concerned, it was very painful. She got *Residenzpflicht* – just like that! She couldn't move, and she was worried about the children, they are sharing showers and toilets with different people, and she was so worried. (IWS, 04/04/2020)

> Report No.18: As I'm speaking now, there are already people who are in Wüsterhausen. They are already in quarantine. They are not sick whatsoever. According to the law, I think it's enough if they give people the so-called *Residenzpflicht* [mandatory stay in place of residence], to stop them from going to another town. Why should you put people who are not sick in a quarantine, block them? Why? These questions I'm trying to ask some people. We have to get out the information. Why? In this time? Are you taking advantage of corona? It's not really funny. This is a shit politic. It's not even politic – it's just shit. (IWS, 13/05/2020)

The above excerpts demonstrate the lack of belief among these women that the state is protecting people against the new coronavirus; instead, they think it is making their difficult situations in the camps worse by restricting their right to move from place to place. In fact, in order to enforce this law, the state authorities went to the lengths of putting a hold on residents' health insurance cards so that they could not move from one town to another if the

need arose, thus restricting them to accessing health services in the towns where they resided. As *Lagers* are often not centrally located, and situated far from major cities and towns, it is not always possible to access healthcare (Dilger & Dohrn, 2016). Although during the lockdown many German citizens in various states were discouraged from making day trips and visiting members of their families who were living in other towns, they could continue to access adequate health care as they did not experience strict restrictions on their movement and their insurance card was not altered. However, because of the strict enforcement of their movement and the alteration of their insurance card, the refugees could only use their insurance cards in the smaller towns in which they lived.

Thus, the enhanced restriction of movement reproduced inequalities and segregation between citizens and non-citizens, since refugees could not move from their *Lagers*, which were often located in smaller villages with limited amenities and healthcare facilities.

Conversely, German and EU citizens living in Germany could leave their houses and flats to exercise or go shopping, and were not confined to their places of residence. However, in one instance following an outbreak of COVID-19, the police enforced a quarantine in a tower block with a majority of East European residents, who mainly worked in meat-processing plants in Nord Rhine-Westphalia. However, the quarantine was for a limited period and was quickly lifted after a few weeks because of the considerable attention it created in the mainstream media. In contrast to this situation, refugees remained confined to their camps for an indefinite period.

While some residents felt that the *Residenzpflicht* was being reimposed, others viewed the quarantine period as a form of detention that would lead to deportations.

> Statements of inhabitants from LEA Ellwangen: Where lies our Freedom of Movement? Consequent upon the outbreak of COVID19, we understand that measures were put in place to reduce movement as well as establish social distancing as far apart as possible. We also are aware that those [who] tested positive are mandated by law to go straight into isolated quarantine for a specified period, ranging between 10 to 14 days, after which their emerging status will determine whether the quarantine continues or not. Unfortunately, and curiously so, we have been subjected to an indefinite quarantine (both positive and negative persons) as the entire camp remains locked down for close to one month now, with no indication of it being re-opened anytime soon. (04/30/2020, *Daily Resistance*)

> Rahul: We are appealing for help! Some of us refugees are under detention – 'quarantine' for COVID-19. While we can't get out, other refugees are being deported to Afghanistan from this same claimed contaminated area. This is unacceptable and unfair. (07/01/2020, *Daily Resistance*)

Thus, during the coronavirus crisis, German federal states increased restrictions on refugees' mobility. Prior to the crisis, refugees experienced a 'regime of mobility' (Salazar & Smart, 2011), as well as many different types of internal border regime (El-Kayed & Hamann, 2018). However, these regimes were intensified during the height of transmission of COVID-19 in Germany. Refugees thus made a distinction between quarantine and detention. Since they knew the quarantine period lasted from ten to fourteen days, being in so-called 'quarantine' did not make much sense to them, and they came to view the State's unjust and racist policies as directed towards them. One person tellingly termed this period 'detention-quarantine.' Furthermore, on my visit to the DoKi camp I was told that anyone who managed to leave the camp for more than 24 hours would become subject to quarantine for two weeks even if they

tested negative. Refugees therefore demanded that their freedom of movement be restored and understood the quarantine period as nothing other than an increased level of detention, ultimately causing them mental health issues and making their lives unliveable. In this manner, the camp environment Instilled threat of fear, uncertainty and danger amongst the refugees at a time when reassurance was most needed. In this manner the camp system does not only deny the refugees their basic rights, but by curtailing their freedom of movement they are further isolated and segregated from citizens and thus rendered invisible for mainstream society.

*4.2 The Suspension of buses*

Some federal states stopped regular bus services from the *Lagers.* Consequently, not only could the refugees not get to the main railway station, they could not even go to the supermarkets to purchase food or everyday items, since many camps were located in distant areas, and it was not easy to access shops on foot if one did not have access to a bicycle. The following excerpts demonstrate the ways in which those who were affected by that articulated their difficulties:

> Report No. 3: Hello, this is the update from Doberlug-Kirchhain about Corona. Because of this outbreak, the buses which used to take people to the market were removed. So, when we asked about it, it was told to us that the bus will be available again once the epidemic goes down. But if you want to go to the market now, you have to walk all the way. (01/04/20)

> Report No. 24: Good morning ladies, this is a record from DoKi (Doberlug-Kirchhain). The bus which used to take people to the *Bahnhof* [railway station] is still not available, and they're saying maybe it will be available by September. (06/07/2020)

> Report No. 23: Hi everyone, this is the report from _____, Potsdam. Another thing is transport. The first bus comes here at 8 am and the last bus comes at 17:49 from town. So if someone… like I'm late, to come back or to catch the last bus, it's either I take a taxi, or I find a way to get here, or I look for somewhere to sleep out there. Because to walk here it's not safe, it's in the middle of a forest. You can't see anyone walking around you – you're all alone walking here, it's not safe for us. So this is another big challenge for us. (06/07/2020)

Thus, refugees not only experienced the denial of their fundamental rights such as access to the main railway stations and shops (already a contentious issue prior to the COVID crisis), they became vulnerable to violence since they were forced to walk by themselves where there was little foot traffic. In contrast, one can safely assume that many of the citizens who lived in these villages and rural towns owned cars and relied less on public transport. Mobility is in some respects constitutive of democracy (Sheller & Urry, 2000). In this sense, the denial of fundamental rights to refugees residing in the camps can only be understood as an example of necropower, since German citizens were not treated in the same manner, given their greater ability to access cars, bicycles and public transport in cities and towns.

Nevertheless, those affected resisted the sudden suspension of bus services, and refugee activist and advocacy groups began to provide them with a 'taxi service':

> Report No. 16: So, this group went ahead and organised a protest at the market area in Doberlug-Kirchhain. They were protesting for the bus services to be resumed on the route. This was the only bus service connection that was available for the residents in the camp. And since the

discontinuation of the bus they have been walking all the way to the *Bahnhof* [train station] and walking to the markets – to and from. And some of them have small kids so they keep on pushing their *Kinderwagens* [baby buggies] all the way up to the market to buy whatever they need, and back. (13/05/2020)

On 9.4.2020 we as We'll Come United Berlin/Brandenburg supported the people from the first reception facility in Doberlug-Kirchhain through a supermarket shuttle with 6 private cars. With this we tried to replace the bus 571 from the first reception to the city center. It was discontinued by the traffic management ElbeElster at the beginning of the Corona crisis. One resident said: 'The interesting thing is: the other buses are running. So why only us? Why are we so isolated?' Another resident added: 'The bus was abandoned about a month ago. We now have to walk or cycle. 5 km is far. On foot it is an hour there and one back. We are totally cut off and stuck here, we can't move freely at all.' (We'll Come United Report)

Thus, through protests and by collaborating with solidarity groups, those affected managed to make their plight visible to refugee activists and support groups, though the quotidian lives of the refugees in the camps during the coronavirus crisis remained largely absent from the mainstream news. What is especially significant in the above excerpts is that refugees recognized the processes of their racialization and the different treatment they were subject to compared with German citizens, who continued to have access to essentials even during the lockdown. As one of the respondents remarked, 'The interesting thing is: the other buses are running. So why only us?' Thus, it should be understood that what those living in refugee accommodation experienced during the crisis was nothing less than a regime of increasing confinement, and that their lives were of little value to the state. As Achille Mbembe stresses:

> Colonial occupation itself consisted in seizing, delimiting, and asserting control over a geographical area—of writing a new set of social and spatial relations on the ground. The writing of new spatial relations (territorialization) ultimately amounted to the production of boundaries and hierarchies, zones and enclaves; the subversion of existing property arrangements; the differential classification of people; resource extraction; and, finally, the manufacturing of a large reservoir of cultural imaginaries. (2019, p. 79)

Thus, the ways in which the federal state in Germany asserted its control over refugee accommodation and refugee reception centres by restricting refugees' mobility through the suspension of public transport in specific geographical areas show that the State was instrumental in the production of hierarchies, zones and enclaves in ways which resembled a colonial occupation. Activists and academics focused on the refugee camps on the borders of the EU with campaigns such as *#LeaveNoOneBehind,* which attracted some public attention (Bojadžijev & Al-Kashef, 2020). However, as the above interview data and testimonies show, the catastrophic effects of the pandemic proved to be especially difficult for refugees even *within Germany's borders,* when border regimes were implemented through the suspension of public transport.

## 4.3 State negligence and boundary making

This section of the study illustrates how the State created further boundaries between its citizens and refugees by failing to provide the latter with adequate measures to protect them during the continuing pandemic.

While hand sanitizers seemed to be freely accessible all over Germany in several indoor places such as supermarkets, libraries, cafés and restaurants, those residing in the camps encountered shortages as the transmission rate of the new virus reached a significantly higher rate in many states within Germany. Many people complained that the camps did not provide gels, soaps or hand sanitizers and asked why they did not take such basic measures, which were fundamental for stopping the spread of the disease.

Rahul: One suspected person was brought to our room by security guards. When we rejected him on conditions of safety and security, they spoke to their leaders. They tried to use force. We told them, they can do it on their own, but in case one gets sick due to the new man they will be responsible. They decided to call the police and also the police tried to convince us that we are all asylum-seekers and that it doesn't matter, we could stay together. We asked the police: what is isolation? We asked the police to give us assurance, that they will be accountable in case one of us gets infected because of him. The police officer said they are not responsible. Then they left, [and] the man was put in the opposite room. Not only we are close contact persons, but almost 400 were also in close contact. Then, why they isolate only us, and they don't provide anything to us which we need? We are not provided [with] disinfectants. We need hygienic and healthy equipment and a permanent possibility to wash. Most of all we need separate rooms and toilets for safety!

Report No. 21: Good afternoon everyone, I am _____ from Eisen. About sanitizing, the only area with a sanitizing container is in the kitchen, which sometimes is not flowing. Sometimes you go to the kitchen and you don't find anything. So, it's a bit worrying. And then the cleanliness in our corridors. But for the corridors and the kitchens they are very, very very untidy and when I say untidy I mean very, very untidy. (5/07/20)

Report No. 14: Now about the social distancing: OK, it only applies in offices, in the canteen, they put the mask where one person is supposed to stand that is 1.5 metres distance. But when it comes to the rooms, we find that in a room there are 4 beds, so when you are sleeping there's no social distancing in the rooms, so I don't know how we can go about it.

Report by Women in Exile. In spite of the social distancing rules [and] lockdown, their families are still sharing rooms without enough space for all of them. They demanded that they should be moved out and accommodated in dignity because they are getting psycho problems when being in the camps without any perspectives. (19/07/2020)

Report No. 61: ...the social worker explained to us that the money (state aid) that we were given, the 150 Euros, [with] that money we are supposed to buy our own sanitizers.

The above excerpts reveal that the basic protective measures such as hand sanitizers were not provided for in the camps. Significantly, social distancing which is so very crucial in protecting oneself from COVID becomes an impossibility for refugees residing in the accommodation since 2 to 4 refugees are required to share small sized rooms. According to the above accounts, the number of people required to share a room has remained unchanged. Furthermore, refugees are neglected by the State, the management staff within the camps, as well as the police, and thus their lives remain inconsequential. As Sabine Ruske from the charity Doctors of the World asserted, 'the risk of transmission in communal facilities is especially high.

Residents live close together. Distancing is almost impossible. They also use common rooms where the risk of coming into contact with pathogens is particularly great' (MacGregor, 2021).

Silke Betscher (2020) contends that the lack of adequate public health measures can only be understood when we consider how 'the refugee' is discursively established as a 'border figure' such that the 'border figure' of the refugee and the social, discursive and emotional demarcations between the German 'we' and the non-German 'Other' seem to be essentialized and embodied. Bosworth et al. (2016) have noted that through the creation of refugee camps, the State exercises their sovereign power in order to 'delineate membership and cast non-members out of the country, often at the expense of their human rights'. The lack of basic provisions to refugees during the time of the COVID crisis illustrates the State's practice of exposing the body of the refugee to excessive vulnerability and inequality. The withdrawal, in times of crisis and extreme uncertainty such as during an outbreak of this unprecedented and highly infectious virus, of the basic resources and measures needed to restrict human to human transmission, such as 'basic hygiene', 'social distancing' and 'the availability of hand sanitisers', demonstrates that for the State, refugees' lives were of little consequence. More significantly, the refugees were conscious of the fact that they were being mistreated, as one of the interviewees expressed, 'But for the corridors and the kitchens they are very, very, very untidy and when I say untidy I mean very, very untidy' (Report No. 21). Therefore, it should be understood that refugees who experienced such conditions were subject to necropolitical power and oppression even in the contemporary context and outside the colonized states. Refugees' narratives show that they recognized the power of the State that had racialized them and set them apart from its citizens. As Rahul stated in his testimony, 'it was the police who tried to convince us that because we are all asylum-seekers and that it doesn't matter, we could stay together.' This overt implementation of segregationist policies can only be understood in terms of the continuity of the imperial legacy. In his book *The Wretched of the Earth*, Frantz Fanon (1961) showed that societies continue to be compartmentalized along the lines of marked inequalities in all aspects of human existence through the use of force, the denial of educational opportunities and forced segregation in living conditions, ultimately leading to the depreciation of one's self-worth. The denial of basic measures, such as those needed to survive the COVID crisis, to refugees and the practice of housing them together have not only divided societies: the State's different policies clearly demonstrate that for the politicians some lives are inconsequential, disposable and less worthy. Thus, German refugee accommodation, which has been recognised to operate in a manner following from the German State's racist laws (Pieper, 2008) should be understood as a form of systemic violence upon refugees and systemic boundary making between citizens and refugees.

### 4.4 Uncertainties and death conditions

In addition to being subject to excessive confinement regimes and being denied access to basic necessities and social distancing, refugees living in the *Lagers* did not have access to basic information like other people in the country. Consequently, the lack of clear information and clear guidelines created an environment of uncertainty. This fact was pointed out by several people:

> Report No. 6: The situation is not good, people don't have information. According to what I understand the people are not aware, unlike if they are somewhere in Berlin, where you can go to KUB or whatsoever to get information. Here there is no information, everything is closed, because of Corona. Even getting money [state-aid] is a problem: ...So, there is not so much information

[regarding how to access state-aid]. The *Flüchtlingsrat*, [the refugee council] they are there, but they don't help. It is closed. Everything is closed there. It is a village. It is closed. And they even treat you bad, it is some kind of racism, they tell you: stay 2 meters away from I don't know what, and it is not funny. It's really sad. (04/04/20)

Rahul: As a result of two refugees who claimed to have been infected by the virus many refugees who are not confirmed sick have been piled in the same room on conditions of suspicion without any sign of the virus. Security guards were shouting and forcing them by hand and pushed them to stay inside without food and washing machines to clean clothes or bedsheets. They were not allowed to get food or tea from the canteen. There is no clear information flow between security guards and government as different orders are being issued at the same time. The work is very slow, almost nothing is done to save the death conditions refugees are facing at the moment.

The above excerpts demonstrate that refugees could not access basic information and that the information flow between security guards and the government was inadequate. Under 'normal' circumstances, refugees rely on a number of sources for their information such as volunteers, activist groups, health care workers, and lawyers who may visit the camps regularly (Dilger & Dohrn, 2016). However, it is evident from the above articulations that during the pandemic crisis the flow of people coming to the camps has been limited since lawyers and volunteers could not visit them and the refugee council office remained shut. That latter is significant since within Germany, it is the *Flüchtlingsrat* (refugee council) that advocates for the rights and dignity of the refugees and serves as an important source of information regarding their basic rights. One of the refugees also made a reference to KUB, a Berlin-based organisation that provides information and legal counselling services to refugees, and functions independently of the State. Although it is based in Berlin, refugees visit this organization from across Germany, but they could not access it during the time of COVID since their mobility was restricted. Thus, refugees contend that in such times, they come to depend on the security guards for accessing information who, instead of offering reassurance, were 'shouting and forcing them to stay inside without basic information' and thus creating an environment and mode of governance which led to uncertainty, anxiety, and the precarization of refugees. Governance through modes of uncertainty have a long colonial genealogy, as it serves to 'reproduce the racialised distinction between "citizens" and "noncitizens"' (Fortier, 2021).

Lack of information resulted in financial losses for those residing in the camps. Meanwhile, citizens received various forms of compensation through the state and various agencies during the closure of business. For example, the Berlin government released thirty million Euros in emergency grants for private institutions, including clubs. In addition, private citizens in Berlin set up a 'Nightlife Emergency Fund' in order to provide emergency aid to those most at risk from COVID-19. In sharp contrast, refugees in the camps could not access their 'money' (state-aid to cover essentials for people who have not paid into unemployment) or basic amenities because various offices responsible for income disbursements had been closed, thus causing incredible hardship and confusion. There appeared to be a lack of information flow between the local health authorities, the local refugee council, and the caretaking staff of the camps. That latter resulted in refugees in the *Lagers* becoming highly vulnerable and being mistreated by security guards.

The federal government in Germany had set up an inter-ministerial national crisis management group as early as February 27, 2020, when only a total of 26 confirmed cases had been recorded in the state (Wieler et al., 2021). However, this group appeared to be solely

responsible for the lives of the citizens. Refugees were thus forced to stay with other refugees who were sick, social distancing became a privilege, and food and basic necessities became difficult to access. It is significant that Rahul mentions that 'almost nothing is done to save the death conditions refugees are facing at the moment,' a realization that the lives people in the camps were leading were simply like 'death'. This illustrated the subjection of refugees to necropower governance in ways they could not easily escape or free themselves from. Taking into consideration Mbembe's notion of 'necropolitics,' and the situation of the refugees in the camps, it is evident that the State did not consider refugees' lives to be as worthy as that of its own citizens since they deny them basic information and updates which is so very essential during the pandemic. The above excerpts reveal that within the COVID context, refugees are of the view that lacking adequate information they are subject to high levels of stress, uncertainty, and fear. The refugees may have potentially survived the virus but their lives become less 'liveable' as they are continually excluded even from receiving basic information pertaining to COVID rules and infection rates.

People's everyday resistance in the camps needs to be recognized, since they have taken it upon themselves to challenge this excessive degree of control, with its segregationist policies and the lack of basic protective measures against COVID-19. The following excerpt illustrates this point:

> Report No. 12: We've not seen change, some of us are the ones that are taking their time to clean the toilets, to clean the kitchen, to take the *Müll* [garbage] outside when it's full. And now people are tired of telling the social, until today, one man decided that he himself is going to face the social who is managing this area, this *Heim*, and talk to her. So, we don't know if there will be any change after he talks to the social. So, we are just hoping and believing there will be change. Because I think by now because of this pandemic the toilets should be clean, even more than before, and the kitchens should be clean, even more than before. (5/5/2020)

Thus, not everyone in the shelter resorted to overt political resistance. Rather, they made their concerns known to the activists, as well as to the management. For example, they willingly shared their concerns with activist groups through audio messages, as well as when they were visited in the camps. Thus, when Women in Exile visited the camp at Wünsdorf, several women picnicked with the activists and shared their difficulties with them. They also assumed responsibility for conducting daily chores to protect themselves from the virus and thus took it upon themselves to clean the toilets. This shows the residents' agency being manifested in their everyday efforts to restore normality, rather than in organizing demonstrations.

## 5. Concluding comments

Refugees' testimonies revealed that during the pandemic they have not received adequate care, that social distancing has become a privilege, that their basic rights to mobility have been curbed and that quarantine measures have become a form of detention in the country with the world's fourth largest economy. Furthermore, deportations from the camps continue to take place during the time of lockdowns, as indicated in one of the reports. Thus, refugees in the *Lagers* not only live with fear of COVID but continue to live with the threat of deportations. In this sense, it should be understood that refugees living in camps have experienced colonial and racialized violence even though these 'disposable "Others" were not actively killed,

but were instead kept injured, dehumanized and excluded, often through the deliberate and harmful inactivity of the State' (Davies et al., 2019) and thus became subject to 'death-worlds'.

An ECRE (an alliance of 107 NGOs across 40 European countries to protect and advance the rights of refugees and asylum-seekers) editorial characterized Frontex as a 'member States man' (including Germany) and claimed that Frontex has been directly involved in the 'push-backs' taking place on the Greek/EU border (during the pandemic) and going against some of the tenets of international law which protect refugees (ECRE, 2020). Thus, the State participates in the dehumanization of refugees' bodies within its territories as well as at its borders.

Refugees living in Germany have shown that living conditions in reception centres and camps during the pandemic have become 'death-like', given the lack of safety measures such as social distancing and basic hygiene. Furthermore, they have been subjected to increased regimentation and securitization, as well as the denial of their mobility. Such levels of precarity reflected exertions of necropower and necropolitics in the camps such that the borders between citizens and non-citizens intensified during the pandemic. As Mbembe notes:

> In fact, everything leads back to borders—these dead spaces of nonconnection which deny the very idea of a shared humanity, of a planet, the only one we have, that we share together, and to which we are linked by the ephemerality of our common condition. But perhaps, to be completely exact, we should speak not of borders but instead of 'borderization.' What, then, is this 'borderization,' if not the process by which world powers permanently transform certain spaces into impassable places for certain classes of populations? What is it about, if not the conscious multiplication of spaces of loss and mourning, where the lives of a multitude of people judged to be undesirable come to be shattered? (2019, p. 99)

In Germany, there are no statistics demonstrating how and to what extent refugees, migrants and people of colour have been affected by COVID-19. This contrasts with the situation in Britain and the United States where the Office for National Statistics and Public Health England and the Johns Hopkins Coronavirus Resource Center (US) have both concluded that Blacks, Asians, Latinx and ethnic minorities have all been disproportionately affected by the virus. Among the reasons for such levels of disparity are existing health inequalities, housing conditions, public-facing occupations and structural racism (Butcher & Massey, 2020). The conditions that refugees have been subjected to in the *Lagers* have potentially made them more vulnerable to the disease than the rest of German society, given their being faced with inequalities of health, inadequate housing conditions and structural racism—the very same factors that have led to black and ethnic minorities in Britain and the United States becoming disproportionately vulnerable to the disease.

Didier Fassin has pointed out that traditionally medical institutions in France distinguish between three types of affliction among immigrants: the 'pathology of importation', that is, diseases brought from their countries of origin; the 'pathology of acquisition', which reflects the impact of the new environmental conditions in which the migrant lives and which affect his or her health negatively; and finally, the 'pathology of adaptation', which references the psychological disorders that result from the difficulties in adjusting to the new society (Fassin, 2005, cited in Sargent & Larchanche, 2007). As a consequence, migrants' bodies become subject to further racialization when they fall ill. In situations where refugees encountered immobility and border regimes, ostracism and racialization while living in the camps, it has become evident that during the pandemic, refugees have come to be defined as less valuable, the State

denying them basic care and the basic resources they need for their day-to-day survival. Such practices simply serve to reproduce racial inequalities in everyday situations.

Thus, on the one hand, refugees become vulnerable to sickness because of the inadequate implementation of preventive measures, while on the other hand, when they fall ill, they are racialized and segregated from German society through excessive quarantine and securitization. As Susan Sonntag pointed out several decades ago, 'the onus of the disease is put on the patient' (1978, p. 46). In this sense, the pandemic has become a pretext for the state to impose further regimes and to create punitive conditions that cause the refugees in the camps to 'permanently live in pain', which in turn might deter people from African and Asian countries in the Global South coming to settle in Germany or encourage them to leave 'voluntarily'. Thus, the pandemic serves as an excuse for the State further to increase its governance of 'unwanted populations'.

The measures or absence of measures adopted by some federal states to control refugees during the pandemic did not take factors of social class in the health situation into account. In Germany, as in many other European countries, class-based mobility contributed to spreading the virus when people returned from skiing holidays and again later in the summer, when they started to return from their summer holidays. The Austrian ski resort of Ischgl was commonly understood to be ground zero for the spread of the SARS-CoV-2 virus across Germany. In late summer, Germany witnessed 1,445 new infections, the highest number of daily infections in more than three months, because the middle classes and young holidaymakers were not prepared to compromise on their summer vacations, which included bar-hopping, clubbing and partying (Sridhar, 2020). The closure of internal borders for a particular group of people within Germany who were not allowed to travel outside the country while their asylum cases were pending amounts to the dehumanization of a group of people who had limited access to the levels of mobility enjoyed by the middle classes and the rest of German society. They must therefore be understood as having been exposed to necropolitical domination in the sense that people did not necessarily die of COVID, but that they continue to live a less 'liveable' life in camp environments during the pandemic with much fear, agony and distress.

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Judit Flóra Balatonyi

# Getting married in times of COVID-19: Structure, agency, and individual decision making*

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## Abstract

Based on my digital anthropological research (nethnography, online surveys, and in-depth interviews) this paper will examine the individual decision-making processes and choices related to getting married during times of COVID-19 in Hungary. The paper raises questions about the extent to which these choices and decisions were individual and reflexive, and how they were influenced or restricted by legal structures and contexts. Using classical and contemporary social theories about decision-making (structuralist and reflexive approaches), on the one hand I aim to explore the structural and contextual circumstances of making decisions about whether to go ahead with, hold-off, modify, postpone, or cancel wedding plans. On the other hand, I study the individual 'decision horizons' as well. Through examining discourses surrounding weddings as well as through case studies, I look at how social actors identify and perceive their options and how they perceive and interpret the related structural constraints, contexts, and rules. The results emphasize that despite – or rather in the face of – changing circumstances, many couples sought new opportunities and new means of adapting, but in the meantime they recognized and interpreted the structural constraints that could potentially influence their weddings, maneuvered between them, or just overcame or circumvented them, and at other times sought to create new structures through their individual and community practices.

**Keywords**: changing patterns of getting married; COVID-19; micro-weddings; social and legal structures and rules; agency; individual decision-making

## 1. Introduction

*1.1 Research problem and questions: On the otherness and sameness of quarantine weddings*

During the COVID-19 pandemic, the process of getting married changed considerably around the world, including in Hungary. In Hungary between March and June 2020 (the first wave of the pandemic) – the period broadly understood as times of 'quarantine' – many wedding receptions (*lakodalom*) and civil wedding ceremonies were postponed, reorganized, or cancelled. In other

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cases, for a variety of reasons couples got married at the city hall or in a church ceremony in front of two witnesses or their immediate families, without a wedding reception and without wedding providers and services. The day of their marriage then continued with just the couple or with an intimate circle of family, or friends and/or neighbors, accompanied by friendly conversation and light refreshments. At the same time, the newly married couple also tried to include some of the ritual-like elements of 'traditional' wedding receptions – for example, the first dance as a married couple, even on the balcony of an apartment in a housing estate, or the joint ritual of cutting the cake and its consumption. The phenomenon attracted lively media attention from the very beginning. These reports showed news of strange, unusual, smaller, simpler, and more personal new kinds of weddings, and spoke of their *otherness*, characterizing them as *quarantine weddings*, *COVID weddings*, *mini-weddings, or micro-weddings.*[1]

Soon after the quarantine ended, everything seemingly returned to normal. Grandiose weddings with many guests were back, and wedding providers also returned to action. At the same time, post-quarantine wedding ceremonies became slightly 'different' – the pandemic had left its mark on them. Rites and modes of getting married, seating arrangements, and the texts of rituals were modified. Besides large wedding receptions combined with a civil ceremony, there were a surprisingly large number of 'piecemeal' weddings (when the process of getting married was broken down into its constituent parts and completed in several installments). Smaller, civil marriages held at city hall – also characteristic of the period of the quarantine – reappeared, along with plans for large receptions (*Big Days*) to be held at a later date; as well as wedding receptions without an official civil wedding ceremony in cases when the latter had already taken place. Ex-post statistics for 2020 and 2021 show that during the period of the pandemic situation (three waves), only in Hungary among the countries of the Visegrad Group (V4) was there no drop in marriage rates.[2] In fact, in 2020, the number of marriages even increased slightly (67,301) compared to the previous year (which saw an exceptionally high number of marriages: 65,300 couples). However, it can also be seen that the number of marriages per month during the pandemic tended to decrease during periods of severe restrictions and lockdowns, and increase during periods of temporary loosening.[3] While the period of restrictions was characterized by civil ceremonies and mini-weddings, the period of loosening of restrictions saw a mixture of large weddings and smaller weddings and civil marriages.

What are the reasons for the otherness of the weddings that were planned and replanned or held during the first wave of COVID-19, and what are the reasons for their sameness? How can we explain the strategic detachment of the legal act of getting married from the wedding reception? How can we explain the popularity of micro-weddings and of wedding receptions without civil marriage? Were individual decisions shaped by changing political, economic, and social factors and contexts, or did individual decisions become normative and shape structural constraints, and along with them, weddings? What can we say about the interconnections between structural constraints, agency, and personal decision-making through looking at wedding ceremonies and wedding receptions?

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1   See e.g. https://www.noklapja.hu/olvasnivalo/2020/05/20/10-12-ezer-eskuvo-keresi-a-helyet-a-naptarban-2-resz/ Accessed 13-7-2020. In the English-speaking world, these shorter, abridged mini-weddings are also jokingly referred to as *minimony*; the word is derived from a playful combination of 'mini' and 'ceremony.' Cf. https://www.collinsdictionary.com/submission/22590/minimony Accessed 16-10-2020.

2   E.g. https://adatujsagiras.atlatszo.hu/2021/04/15/a-jarvany-ellenere-hazasodik-a-magyar/?fbclid=IwAR2I2LQ Rdl_WwgAMse308cBhFjNvSOy8vS8gr9xB4cWnULzC9AQanvxGh9s Accessed 20-5-2021.

3   See e.g. http://www.ksh.hu/gyorstajekoztatok/#/hu/list/nep Accessed 10-5-2021.

*1.2 Aims of the paper: Exploring reasons for the otherness and sameness of quarantine weddings – structure, agency, and individual decision making?*

Anthropological and sociological research that deals with decision-making either stresses the role of structure – traditions, customs, and social relations – or individual agency and reflexivity. Although from the 1950s to 1970s social scientific research spoke about individual decision-making determined by social structure (cf. Goodenough, 1955; Freeman, 1961; Horowitz, 1967; Howard & Ortiz, 1971; cf. Quinn, 1975, in more detail), and from the 1980s and 1990s the impact of the *reflexive* turn, lived and embodied (*lived experience* Ingold, 1993; Bruner, 1983; Turner, 1986; reflexive approaches Foucault, 1978; Giddens, 1992; Illouz, 2012), the emphasis has shifted to *lived experience.* Pierre Bourdieu took a different approach to the reflexivity of decision-making when he argued that, although everyday decisions are reflexive and 'immediate,' agents' structurally determined *habitus* influences them (cf. Bourdieu, 1977; 1990). Similarly, although current research that deals with decision-making and choices in principle attempts to formulate some kind of integrative viewpoint, it tends to still either stress the continuing role of structure in individual decision-making and consider personal agency and reflexivity to be of lesser importance (e.g. US and British research on the sociology of the family: Gilding, 2010; Rosalind et al., 2012, p. 739; Gross, 2005), or to analyze the dynamic decisions of agents using an internal, phenomenological focus (cf., for example, Boholm, 2013; Goldstein & Gidoni, 2001). Duality is also observable in the social scientific literature on getting married and choosing a partner, and it seems to me that, to some degree, the approach that is chosen determines the outcome. Studies that focus on structure in modern, Western countries (including Great Britain) basically underline the influence of social relations and structures, or rather of the reigning normative discourses, and consequently of traditions and customs (cf. Carter & Duncan, 2018). Research that focuses more on individual agency, resistance, and resilience emphasizes the particularity of individual decision-making, and sees it as a turn against dominant norms and customs that are continually reinterpreted, even in the case of the forced marriages of post-socialist Asian countries, such as bride abduction (cf. Werner, 2009).

In my paper, I will attempt to examine individual decisions related to getting married and the complex ensemble of social and cultural contexts, as well as regulations and structures affecting them, paying equal attention to these factors. I will combine my external, etic observations with internal, emic perspectives and contrast them methodologically. I call attention to the productive tension between the purposeful agent and the society that constrains her (structure), and between structural determinism and situational openness (cf. Meyer et al., 2016). In the current paper, I only reflect on my observations concerning the period between March and August 2020, and address the situation outside of this period in a few, necessary cases. Thus, I will not touch upon the effects of regulations on getting married during the second wave of the virus (ongoing since November 2020 and still continuing at the time of writing in December).

*1.3 Research design and methodology*

Since mid-March 2020, the time of the first appearance of COVID-19 in Hungary, I have been investigating Hungarian wedding practices and situations of decision-making involving the re-planning of wedding ceremonies and wedding receptions. During the lockdown period, legal constraints, special regulations, structural constraints, and the discourses connected

to them became more evident. Furthermore, those individual and more general situations in which individual agents tried to manage and realize, modify, or suspend their own ideas relating to getting married as they were trying to adapt to or counteract the structural constraints shaping their experience also become more visible and audible. The paper is part of a 'multi-sited' cultural anthropological project that I began in September 2019. As originally planned, it was to include a large amount of 'classical' anthropological fieldwork on transformations in decision-making about getting married and ways of conducting weddings. Due to the pandemic, I had to modify the direction and methodology of the research to involve COVID-19 and getting married. In the course of my research, which due to the virus situation I was forced to temporarily move over to the digital sphere, I archived offline and online news, legal and health regulations, as well as Facebook discourses reflecting on the latter in Hungarian-language wedding-organizing- and chat-groups.[4] I also 'listened to' debates and conversations related to the organization and reorganization of weddings, as well as to individual and collective dilemmas. Thus, I documented several live-streamed civil marriages, as well as the commentary (comprising thousands of supportive statements) accompanying the signatures related to an online petition in favor of holding wedding receptions during the pandemic.

In April, I put out an online questionnaire with detailed and for the most part open questions (henceforth, 'COVID questionnaire'), which inquired into the strategies and specific practices of reorganizing weddings among those planning a wedding after March 2020. I published the *Google Forms* online questionnaire for self-completion in the form of a paid ad on Facebook. As many researchers have pointed out, survey-based studies may experiment with strategies that employ the digital footprints left by users on Facebook as entry points for recruiting participants and complementary data sources. Facebook's advertising platform represents a great opportunity due to its marketing tools that target advertisements based on users' demographics, behaviors, and interests (see Iannelli et al., 2020). In my case, the target group was defined by age (20–60 years), residency in Hungary, engaged or newly married status, and interest in marriage and weddings. I highlighted the questionnaire twice (for three days each) between April and May: during the April campaign, it reached 23,900 users (1,400 activities), and in May 12,200 (448 activities). I thus reached a total of 34,531 users: this figure does not exclude repetitions, but I constructed partially different target groups in terms of social stratification, educational level, and target counties for the two advertising periods. Almost 500 people filled out the questionnaire. I also received a lot of feedback (emails, Facebook posts), reflections, and thanks. Nearly three-quarters (72.7 per cent) of respondents were between 20 and 30 years old; the age of 27.1 per cent ranged from 31 to 50. The proportion of those defining themselves as female was 96.5 per cent. The overwhelming majority declared themselves to be of Hungarian nationality (three Swabian or German, one Romanian), 60.2 per cent had graduated from university/college, while 2 per cent had also obtained a PhD, 30.6 had a high school diploma, 7.7 per cent had been through vocational or technical high school training, 1% had received a post-secondary certificate, 1 per cent had associate degrees. About one-quarter (25.5 per cent) lived in the national capital, 29.4 per cent in a county capital or large town; 25.5 per cent lived in a small town; 19 per cent in a village; and 3 per cent on a farm.

In addition, I recorded (through Zoom, Skype, and Microsoft Teams) 20 in-depth interviews with brides who were planning (and replanning) their weddings at the time of COVID-19. The majority of the brides lived in the capital or in rural cities and county capitals (Somogy

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4    I was present in about 12 groups. I paid attention to the four most active groups most intensively, on a daily basis (the number of members in the groups varied between 2,500 and 29,000).

and Csongrád County), and were 20–35-year-old graduates, while two of them lived abroad. After completing the online questionnaires, they also had the opportunity to volunteer to be interviewed. The call for interview was included in the last point of the online questionnaire. In the course of my research, I primarily gained insight into women's status and opinions; my interviewees as well as the participants of the online discussion groups – not counting some mixed-sex wedding providers – were primarily women.[5]

## 2. Findings

### 2.1 Legal, political contexts and structures – Checks and driving forces

#### 2.1.1 Checks

First, let us look at the structural context in which couples had to make decisions about their weddings during the time of COVID. Here I will primarily focus on the politico-legal contexts and structural constraints. Due to the pandemic caused by the COVID-19 virus, a variety of politico-legal and health measures and restrictions were introduced in Hungary, similarly to in several other affected countries. In keeping with Government Decree 41/2020. (III.11.) larger gatherings, also including *wedding receptions*, were first restricted from March 11, 2020, while from March 16, in accordance with Government Decree 46/2020 (III. 16.), they were banned. Since family events, thus marriage ceremonies, were not considered 'events,' it was still possible to hold civil and church marriage ceremonies. From March 28, 2020, in accordance with Government Decree 71/2020 (III.27.), the government also introduced restrictions on the number of participants at civil marriages. Until June 1, civil and religious ceremonies could only have two witnesses and a small number of participants. Certain local municipalities interpreted the number of participants differently. Until May 4, the easing of the restriction, there was a shorter period (starting around April 18) when not even photographers or videographers were admitted to such ceremonies. The government announced on May 14 that from June 1 'ceremonies with a maximum attendance of two hundred people will be allowed in the countryside and in Pest County.'

#### 2.1.2 Driving forces

Beyond pandemic-related central and local restrictions and decrees, another important factor may be mentioned – the role of political, family- and population-policy-related regulations that, in my opinion, often determine practical-material considerations and motivations when planning and weddings. That is to say, for several types of favorable credit packages – for example, the *Babaváró hitel* (Childbirth Incentive Loan), and *CSOK* (Family Housing Allowance) – being married and planning to have a child are prerequisites (for details cf. Szikra, 2018; Hungler & Kende, 2019). The abovementioned family policy measures and subsidies regarding family policy are important for us here because I hypothesize that the timing and reorganization of the weddings that had been scheduled for 2020 may have been influenced by these subsidized credit packages. The connection can be best demonstrated through statistical data. According to a report by KSH (the Hungarian Central Statistical Office, CSO) in 2019, the

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5   Note that this gender ratio does not result from a specific gender focus of the research, as I tried to address both women and men with my self-administered questionnaires. It also follows from the gender division of the responses and the disproportionate presence of women on online wedding planning interfaces, so to speak, that marriage is primarily a 'female topic.' Social discourse and relevant knowledge about the topic is primarily under female supervision.

year of the introduction of the *Babaváró hitel*, significantly more weddings were held than in previous years. Between January and December 2019, 65,300 couples got married; 14,472 or 28 per cent more than in the previous year (what is more, since 1990 this was the largest number of marriages to take place in a single year). According to estimates and 'predictions,' this increase would have continued throughout the 2020s. However, presumably owing to restrictions due to COVID-19, this growth stopped and the number of weddings began to decrease. Let us recall that although in May wedding ceremonies were not yet possible, from June (June 1 in the case of the countryside, June 15 in Budapest) wedding receptions could resume, while restrictions and tightening up started again from November. While in January–March and April 2020 there were 10.1 per cent and 8.8 per cent more weddings registered (respectively) than in the same months in 2019, from May on a decline began: in May there were 30 per cent fewer marriages; in June and July the figures show a 26 per cent drop, and in July–August 6.9 per cent fewer weddings took place than in the previous year. From September, there was another increase, with 2.9 per cent more people getting married in September and 17 per cent more in October. In all, 67,301 couples were married – 3.1 per cent or 2,033 more than in the previous year. Between January and February 2021, 6,877 couples married – 6.8 per cent fewer than in the previous year.[6] However, compared to the period before 2019, these numbers still indicate a very high degree of willingness to get married. Based on the above, it seems probable that there is a relationship between the subsidized low-interest rate credit opportunities and the willingness to get married, just as it seems likely that the COVID-related restrictions that affected weddings led to the decrease in the number of weddings that took place.

But what role did these restrictive regulations on mass gatherings – introduced in connection with the pandemic – and the motivation provided by favorable credit play in personal decisions regarding getting married during the first wave of COVID-19? How did the people affected by the regulations interpret the situation? To what degree does the detection and existence of structural constraints and forces and social discourses correspond to decision-making according to the rules or to the social practices that (in part) follow from these? Let us examine how agents perceived and interpreted or reinterpreted the structures, contexts, regulations, and information at their disposal that affected their decisions, and in light of these, examine how the latter defined their options, and with what alternative(s) they associated them (cf. Boholm, 2013; Ingold, 2000). I also address how the latter decided, and what their related activities were.

### 2.2 Communal-individual identification and interpretation of legal-political structures and contexts

According to 68 per cent of the respondents of the COVID questionnaire, the outbreak of the pandemic and the epidemiological measures influenced their civil wedding ceremony and their wedding reception. Six per cent had already held the civil ceremony prior to the period of quarantine, thus, according to them, only the wedding reception was endangered. For 2.2 per cent, their church ceremony was also affected by the regulations. A few (1.8 per cent) did not plan a large reception, so the restrictions only affected their civil ceremony. According to 6.4 per cent of the respondents, the restrictions did not 'endanger' their getting married (e.g. due to a later date, smaller number of guests, or a more modest wedding). Thus, as a starting point we can state that the majority of those planning to get married felt the effects of the restrictions on their own plans to wed. They regarded most of these as restrictive.

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6    Available at http://www.ksh.hu/gyorstajekoztatok/#/hu/list/nep Accessed 26-04-2021.

What about those who said that the pandemic situation did not affect their wedding in any way? This is a smaller group; they spent less time and energy on the organization of their weddings and did not make any irrevocable decisions about them, either because of their very distant wedding dates or because they had originally planned a simpler civil ceremony without service providers and guests. Based on my questionnaire survey and interviews, it is my impression that the events of already concluded 'under-planned' weddings did not follow entirely from the decisions and choices that had preceded them. Niklas Luhmann writes that there can often be discontinuity between decisions and actual actions; actions do not automatically follow from decisions in any logical or causal sense, except to the extent that decisions always confirm intentions (Luhmann, 2005, p. 96). But that is not quite what happened in this case. Rather, the discontinuity concerned the fact that in the course of their decisions the couples also improvised, drifted, and followed the scenario of the civil marriage and its emotional roller coaster along with their various spontaneous ideas. They did not participate at all, or only minimally, in the everyday discourse about COVID-19 weddings; they did not read about the changing conditions for getting married or of holding wedding receptions; they did not seek to, or perhaps they did not wish to, recognize the structurally restrictive nature of the changed conditions.

In contrast, the members of the other, larger group recognized and identified the structural constraints weighing upon them due to COVID-19, and not only perceived them, but also reacted to the limiting effects of the regulations. They did not perceive them all at the same time and at the same pace. Rather, 'COVID panic' hit couples in several waves, depending on how far along they were in the planning process, how involved they were in it, and, on the (earlier or later) date of the planned wedding, while occasionally the effects of the perception of the suspension of restrictive regulations could also be felt. Often, members of a given couple reacted differently or at a different pace to the increasingly stringent measures. Based on my observations, I think that a bride's personal, family circumstances as well as her relationship with her partner and her personality also affected her recognition of the structural constraints. Several of my interviewees reported that in their case the interplay of specific situations and events pointed to the need for redesign; the need to address structural constraints.

At other times respondents were not necessarily confronted with restrictive structures, but, for example, with their socio-economic effects. Thus, for example, many came to understand the legal and economic implications of the restrictions caused by COVID-19 through their recognition of their own precarious financial situation and that this jeopardized their intended marriage.[7] More than half (55.6 per cent) of respondents of the COVID questionnaire felt that the cost of the planned marriage remained manageable, despite the pandemic, while others felt that their economic situation had become more unfavorable and uncertain: The latter was especially true for those who were forced to change jobs or to take unpaid leave, etc. More than one in ten (12.9 per cent) were not at all sure whether they could continue to afford the cost of their wedding. 11.1 per cent of the respondents reported the depletion and loss of their reserves, 6 per cent the loss of their job, 2.7 per cent the loss of a partner's job, and 2.1 per cent the need to change jobs.

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7    As transpired from the answers to my questionnaire, the costs of weddings during the period under review were as follows: 38 per cent of the respondents budgeted amounts above HUF 2,000,000; 39 per cent planned to spend an amount between HUF 1,000,000 and HUF 2,000,000; 15.8 per cent reckoned with an amount between HUF 500,000–1,000,000; and 7.5 per cent with an amount less than HUF 500,000. The majority, 80.8 per cent, planned to cover the cost on their own; 42.2 per cent with financial help from their families; 2 per cent with a bank loan; and 27.6 per cent with the proceeds of the wedding (respondents could choose several options).

Often, they had to realize that the legal restrictions would affect their social relationships. For example, that the wedding guests, family, and friends would constantly question them and worry about the future wedding, or that close relatives and family members would cancel their attendance at their wedding one after the other. Or they themselves began to worry about the possible non-attendance of guests. Because during the quarantine period the presence of guests at weddings was simply forbidden, after this period brides tended to fear that economic hardship caused by the epidemic and specific health threats and the fears resulting from it, as well as international travel bans, would lead several of the invited guests to cancel. Uncertainty about guest cancellations culminated in concerns about wedding gifts (i.e., monetary gifts, cf. Vasile, 2015) on the one hand (27.6 per cent of the respondents were hoping to cover the costs from the proceeds of the wedding). I have listed above the changes in my respondents' financial situation that had the potential to endanger their wedding plans. In addition, 40.2 per cent of respondents assumed that guests might also have problems affording wedding gifts. On the other hand, if the guests were to stay away, the grand celebration with family and friends would also be jeopardized. After all, if there are not many guests, there is no big wedding reception, and there is no real ritualization and celebration. One of my interlocutors, a thirty-year-old bride from Budapest, only realized the negative, indirect social effects of the legal-political restrictions on their wedding in the third month of the period of quarantine when her best friend, her witness, withdrew from the wedding. But while in the above case wedding cancellations were merely the first serious confrontation with restrictions, they heralded the need to work out other options and create further plans. In other cases, the withdrawal of those invited led to specific decisions such as the postponement of the marriage ceremony (and all it entailed) by a year. This was also the case with a 25-year-old interviewee in Siófok, who with her fiancé decided to postpone their wedding due to the cancellation of the attendance of close family members.

COVID-19 regulations entered the crossfire of everyday discourse not only because of their recognized restrictive, prescriptive, and prohibitive nature, but also because of their uncertainty and variability. My interlocutors and the respondents to the COVID questionnaire also referred to the instability of regulations on numerous occasions. The perceived uncertainty about the regulations made wedding planning more difficult than the specific restrictions themselves. As a result, stakeholders often suspended decision-making about marriage planning and re-planning. At the same time, uncertainty also gave way to hope. Both in online discourses and in the responses to the COVID questionnaire, it was repeatedly pointed out that that couples preferred to delay the implementation of their plans and 'wait,' hoping that the restrictions would sooner or later be relaxed or lifted: 'We have agreed to be in a position of waiting until the beginning of June […] Perhaps the hardest part is that everything is still uncertain. We really hope we can keep it as originally planned' (March 29, 2020; Zala County).

### 2.3 Collecting and producing information during the first wave of COVID-19

In addition to perceiving and recognizing the structural constraints, wedding planners and couples planning to wed were not only passive observers or 'victims' of circumstances, and did not only delay their decisions but were also socially active and engaged in resistance prior to the government's announcement of May 14[8] that promised the relaxation of regulations

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8    From June 1 it was possible to hold wedding receptions again with appropriate precautions – e.g., with individuals maintaining a distance of 1.5 meters.

in the near future. Members of the wedding organizing Facebook groups – brides and wedding providers – continuously followed and interpreted centralized and local measures related to the epidemic, government decrees about weddings, press conferences and parliamentary broadcasts, local government measures, and various media reports that reflected on them. At this point, it is also important to see clearly that individual decisions about weddings and wedding receptions did not only concern specific couples, families, and so on, but also the wedding industry that provided them with services. Due to COVID-19, the situation of wedding service providers became fundamentally precarious and vulnerable, especially in cases when the service was the main source of revenue and main job, and the related company did not have adequate reserves. The economic situation of the wedding service providers, which had become unpredictable, was also recognized and acknowledged by the couples, and they expressed solidarity with them through their action as well as at the level of public discourse. What I found was that wedding service providers tried to mediate between individuals, as well as between power holders, policy makers, and officials[9] in the form of private initiatives and trade union advocacy (*Lakodalmi Szolgáltatók Érdekképviselete*) through online petitions, open letters, and various inquiries. Meanwhile, in addition to representing consumers and brides, they naturally also represented their own interests. In countries where the bridal industry is a key element of GDP such as the UK, according to official statements made during COVID the government worked closely with investors and managers in the bridal industry and jointly set up guidelines concerning safe methods for getting married and establishing cohabitation.[10] The 'wedding industry' generates significant annual revenue, from the United States through India to Europe, year after year. According to the predictions of the Hungarian Central Statistical Office CSO, before the outbreak of the virus in the country, the industry was set to generate HUF 138 billion in revenue in 2020.[11] As the actors of the Hungarian wedding industry saw it, they did not get an opportunity to directly influence decisions affecting them because of their (thus far) less significant economic weight. 'We have reached the level of secretary of state through several channels; they are aware of the problem. However, we do not appear to be a determining economic factor' (wedding service provider, Facebook wedding planning group, April 18, 2020).

The moderators of the wedding organizing groups of the wedding service providers created 'collection posts' and regularly updated the latest information and deleted obsolete posts, such as those involving regulations that had already expired. Typically, they published the more general and specific rules of local municipalities. In addition to these, dozens of individual questions and dilemmas were formulated every day. From the first weeks of March, in relation to the appearance of the virus first abroad and later in Hungary, and related media coverage, concerns surfaced again and again, sounding very much like 'pre-wedding panic.' From March 11 onwards the Hungarian government limited the number of participants at weddings and other events to 100, anxiety finally set in and brainstorming and speculation regarding rethinking the number of wedding participants began. The majority of marriages

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9   I.e., the Operative Taskforce set up by the government to co-ordinate the fight against the disease.

10  Available at https://www.gov.uk/government/publications/covid-19-guidance-for-small-marriages-and-civil-partnerships/covid-19-guidance-for-small-marriages-and-civil-partnerships accessed 08-08-2020.

11  Available at https://24.hu/fn/gazdasag/2020/06/01/koronavirus-eskuvo-junius-riziko/ accessed 08-08-2020. In the UK, it generated revenue of £10 billion a year (Carter, 2018, p. 175), in the US, the figure reached $72 billion according to a figure from 2016 (https://www.marketresearch.com/IBISWorld-v2487/Wedding-Services-Research-10625277/?progid=89606 accessed 08-08-2020), while for India we can read reports of 50 billion revenue in 2019 (https://www.livemint.com/opinion/columns/india-s-big-fat-wedding-industry-is-slowdown-proof-11580406700650.html accessed 08-08-2020).

scheduled for 2020 were not yet affected by these initial restrictions, as according to my April-May 2020 COVID questionnaire, 65 per cent of respondents had planned an event with fewer than 100 people. However, the weddings of a smaller group were already in jeopardy at that time. One-third (33.3 per cent) of respondents were planning wedding receptions with 100 to 200 attendees, while less than 2 per cent were thinking of large weddings with more than 200 people.[12] However, fears were already growing beyond concerns about the specific 100-person limit. When in addition to the central governmental limit of 100 people at wedding receptions the number of attendees at civil weddings was also regulated at the local level, reports of the changing regulations from both service providers and brides-to-be began to appear in rapid succession in the chat groups. For example: 'I spoke to the registrar of Óbuda, Budapest 3rd district, everything remains [the same] for the time being, there are no official restrictions […]' (Facebook wedding planning group; March 16).

The government's April 29 press conference and the one on the following day (April 30) that clarified the previous day's announcement was surrounded by lively discourse, as was the publication of all other regulations in *Magyar Közlöny* [*Hungarian Gazette*] the official govern-ment publication (2020/96). From the subsequent clarification of the regulation, it transpired that, until the regulation was revoked, no events – i.e., not even those with fewer than 500 participants – could be held. Civil and church weddings were permitted, but wedding recep-tions were still forbidden. The announcements led to speculation about the possible holding of wedding receptions with fewer than 500 attendees. Again, weddings became the focus of epistemological interpretations. Facebook group members tried to determine whether legis-lators, or those implementing the regulations, by the word wedding (*esküvő*) meant civil or church ceremonies, or possibly wedding receptions. 'Well, the concepts are all helter-skelter. Civil ceremony, wedding, wedding reception, of which the first two are listed in the decree, both of which are permitted in the countryside. Now what?' (April 29).

Thus, during the quarantine period it transpired that brides and wedding service providers sought information intensively, trying to understand the situation brought about by the new legal structures and restrictions as much as possible.

Why was all this necessary? Classical economic anthropological approaches underline that such intensive collection of information is primarily needed when the choice between individual decision alternatives proves problematic and promises to be conflicting (cf. Howard & Ortiz, 1971; cf. Carter, 1954 earlier). Stakeholders will also actively gather information when faced with entirely new decision situations compared to their original plans and decisions, and they do not have some kind of preferred alternative, but at the same time are trying to make good decisions (cf. also Howard & Ortiz, 1971).

The majority of prospective brides planning to marry during times of COVID (57 per cent) had some very specific, often pre-conceived ideas about their own weddings that predated the restrictions, and often even their current relationship. This coherent *dream wedding scenario* could also be called typical ('habitus'), although 33.8 per cent of respondents said they did not have any such ideas. In addition to these typical ideas, my respondents also listed new ideas, often referencing the specific relationship or ideas they had taken from various inspirational web pages among their preliminary plans. Not only were the brides' own old-new preferences included in their marriage plans, but in 40.2 per cent of responses so were the (male) partner's, and in 18.8 per cent of cases the wedding dreams and ideas of parents, friends and relatives were also incorporated. My recorded in-depth interviews often touched upon the expected or

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12    This number was also typical of previous years.

actually fulfilled role of the groom in wedding planning and/or reorganization. While several brides emphasized their partners' passivity and lack of interest, they also discussed how they had tried to please the groom during the organization of the wedding, or how they had managed to circumvent the latter's various ideas. Among relatives and friends, the ideas of female relatives (mothers-in-law, mothers, grandmothers) and, less often, male relatives (primarily fathers and fathers-in-law) were incorporated. My interlocutors alluded equally to compromises and disputes, parental pressure, and a lack of consensus about decision-making roles during the preliminary planning.

Based on contradictory socio-cultural expectations and their own preferences that were presumably influenced by these expectations, the majority of the couples getting married during times of COVID had created a specific *wedding timeline,* often with the help and guidance of service providers (mostly wedding planners, semi-professional groomsmen, or MCs). According to the COVID questionnaire, out of a total of 487 respondents, for 38.4 per cent a first, pre-epidemic version of a *wedding timeline* had already been completed. In the case of a further 39.5 per cent such a *timeline* had been partially prepared. In 13.6 per cent of cases, no timeline had been developed yet, while 11.9 per cent did not even plan to compile such a list. It is important to recognize, therefore, that the means and outcomes of the re-planning that became necessary during COVID-19 were also related to the progress of the wedding organization and planning, the preliminary elaboration of scripts, and the solidity of parental and personal preferences. The majority tried to adhere precisely to these preliminary scripts or looked for completely new opportunities that, however, were most compatible with their own expectations.

It also follows that, during the period under review, prospective brides actively sought information not only about structural constraints and regulations, but also tried to obtain as much knowledge as possible about fashionable and traditional aspects of contemporary weddings. During the time of COVID-19 brides often inquired on online surfaces about the contemporary opportunities (rural, urban, traditional, modern) and meanings of getting married, of civil weddings, and wedding receptions. In the meantime, questions about both general and special norms and rules and expectations related to getting married were raised numerous times, as well as about how these could be met and implemented in times of COVID-19. These brides-to-be were especially interested in the rules and guidelines related to getting married. For example, who adheres to these rules, why, and in what way can they do it? Among the social networks of a couple, who is going to hold them to the rules? Furthermore, how can the various wishes and suggestions of 'vigilantes' be fended off and ignored? When, why, and with whom is it necessary to compromise – in effect, to live up to their expectations? My results so far indicate that although the issue involves some rural-urban and social differences, couples try to meet the expectations of their friends and contemporaries rather than those of the older generation: their parents and relatives.

The priority of making their own decisions, quasi-independent of the family, was repeatedly touched upon by my interlocutors, and the topic was overrepresented in the discourses of everyday online wedding groups as well. In one of the Facebook wedding planning groups, similarly to many other posts, members reacted with great outrage and empathy to a May 30, 2020 post of a young bride-to-be in which she shared details of the cancellation of her wedding reception. She had, together with her fiancé, decided to celebrate with a two-witness, civil wedding instead of the large-scale wedding-cum-reception originally planned and already organized. Although several thousand other couples had also made the same decision, in the young bride's interpretation (although her decision was influenced by COVID-19-related legal-health regulations), in the end the indifferent attitude of the guests who had been

invited, and especially the intrigue of the mother-in-law (the groom's mother) led them to cancel the event. It also became clear from the comments on the post that the members of the Facebook bridal group, in this case at least, condemned external (family) interventions in the organization of wedding receptions, such as those that were made in the name of tradition. Instead, they emphasized primarily the autonomy of the couple in relation to getting married, and considered their joint choices and decisions in the organization of marriage to be decisive. Nonetheless, the possibility of making decisions jointly, compromising with family, relatives, and friends, evaluating rules, regulations, norms, and contexts on a case-by-case basis also arose in connection with certain issues.

Thus, with the help of intensive information gathering, prospective brides essentially sought to find new options and evaluate them individually and communally. They tried to actively seek, recognize, and create new opportunities while beginning to look for ways of challenging the restrictions. On the one hand, a kind of game involving maneuvering between the structures was observable that was characterized by a high degree of resilience. On the other hand, both disregarding consciously recognized structures and 'relinquishing' decision-making to structures that social actors were fully aware of, while they relegated themselves to the background, were common practices. Besides these cases, I also identified examples of active attempts to transform such structures.

### 2.4 Strategies and practices for maneuvering between structures, crossing structures, and building new ones

#### 2.4.1 Maneuvering between structural constraints – Searching for previous unconventional practices

Marriage planners looked for ways of maneuvering between structural constraints and novel modes of getting married, sometimes finding them in older, unconventional wedding practices. One of the most typical examples of this style of getting married as a quasi-norm was the detachment of civil weddings from *Big Day* celebrations and their celebration as two separate occasions. Smaller, two-witness civil ceremonies (i.e., micro-weddings) held first and separately from subsequent wedding receptions at a later point (days, months, or years later) and the accompanying ritual confirmation ceremonies have been part of Hungarian marriage practices for several years, and have become particularly common in the last two or three years. On the one hand, *confirmation ceremonies,* following contemporary wedding fashion, try to showcase the biographical, personal aspects of the couple's relationship; on the other hand, in keeping with more traditional norms, they also stage and mimic the civil wedding ceremony for the benefit of wedding guests. The separation of the formal civil ceremony and the wedding reception has also created another role for wedding service providers, or rather opened up a new avenue for them. This is because in most cases when couples get married without planning a church wedding, they ask the wedding service provider to act as a *ceremony leader* to *stage* or *confirm* the act of getting married.[13] Hungarian *confirmation ceremonies* are a specific subtype of *commitment ceremony* practiced internationally in the case of unregistered, unofficial wedding ceremonies. Internationally, the most important argument in favor of separating the commitment ceremony and the *Big Day* (i.e. liberating participants from the burden of the formal wedding ceremony) is allowing the couple to pay attention only

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13  Contemporary anthropological research has primarily covered the phenomenon in connection with certain minority groups, such as European e.g., British Muslims, as cases of unregistered, unofficial marriage (Akhtar, 2018), and as alternatives to Western LGBTQ marriages (Marzullo & Gilbert, 2011, pp. 535–536; Reczek et al., 2009).

to themselves, their families, friends, and acquaintances.[14] In Hungary, couples choose to have such 'piecemeal' weddings with a confirmation ceremony added on as an extra to the formal act of getting married for several reasons. One is that if all components are held on the same day the event becomes too 'congested'; another reason may be the extravagance and extraordinary nature of the wedding venue and date; while finally a couple might choose this option because there are some other family-economic circumstances that precipitate the need for completing the legal act of getting married, but the latter wish to celebrate 'properly' at a later date. It also seems to me that by planning a piecemeal wedding, brides seek to take control of their event by making a conscious choice between a formal wedding and a confirmation ceremony – deciding when, where, and how they wish. Furthermore, it can be assumed that bridal narratives that emphasize the couple's personal ideas, uniqueness, their specific relationship, and romantic feelings reflect critiques of contemporary weddings that also appear in everyday discourses. That is to say, due to the fact that although there are many divorces and many marriages are entered into primarily for economic reasons (see also the problematic of the *wedding paradox;* Carter & Duncan, 2017; 2018; Willoughby & Spencer, 2017).

The results of my questionnaire that examined the decisions of those planning or replanning their wedding at the time of COVID-19 show that about 19.8 per cent of respondents wished to get married (at least in part) because they wanted to take out a loan (more specifically, the Childbirth Incentive Loan). Two per cent of them were expecting a child, and 41.8 per cent were planning to have a child; 18.6 per cent were preparing to buy, build or expand a house, partly from loans and / or wedding gifts, which are often monetary. Just over three percent (3.1 per cent) were also motivated by various tax breaks. According to my questionnaire survey, it was primarily those people who held their wedding during the three-month quarantine period of COVID (and thus separately from the wedding reception) who needed the 'papers' as soon as possible because they expected a child (7.8 per cent), or wished to obtain an already planned loan (10 per cent). Just over twenty-seven (27.5) per cent simply did not want to wait any longer or postpone a long-planned wedding. For 8.8 per cent, a simple wedding was just fine, as it was all 'about them' and this was what was important to them. At the level of narrative representations, getting married solely for the purpose of applying for credit, especially the housing subsidy program called CSOK, and the subsidy for those expecting a baby (*Babaváró hitel*), were mentioned primarily as practices attributed to 'others.' The respondents indicated that although they themselves would take advantage of these forms of credit (since they were getting married anyhow, they would take advantage of the opportunity, and so on), they knew of people who only got married because of the subsidies. 'It's not primarily why we are getting married. [...] There was someone for whom the point was that the child was coming, it had to be fast. [...] There were those who [got married] because of CSOK and they didn't even care, just to get the loan.'[15]

The contemporary fashion of separating civil wedding ceremonies and wedding receptions is also clearly illustrated by the fact that a smaller proportion of COVID weddings were already planned to be 'two-day weddings' even before the pandemic. 8.4 per cent of respondents of the COVID questionnaire held a minor civil wedding ceremony on a separate day and a wedding reception accompanied by a church wedding on another day. Just over four (4.1) per cent had their civil ceremony and a wedding reception on different days; the latter accompanied by a confirmation ceremony administered by a wedding service provider. 2.7

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14   Cf.   https://www.bustle.com/articles/21696-7-reasons-to-get-married-before-your-big-wedding-day-why-i-tied-the-knot-early accessed 27-03-2020.

15   Interview excerpt, woman 25, Siófok, May 5, 2020.

per cent of respondents planned a separate civil wedding and a wedding reception spiced up with both a church wedding and a confirmation ceremony conducted by a ceremony leader. One per cent intended to have a separate small civil wedding and a reception held on another day without any other ceremonies or rites. The original plan of the majority was to celebrate everything on a single day: 40.3 per cent planned to have both the civil and the church wedding ceremony and the wedding reception on the same day; 34.2 per cent wished to have a civil ceremony and a wedding reception; while 6.5 per cent planned only a small dinner in addition to the civil ceremony. During the quarantine period, if the couple did not postpone getting married altogether – this was the strategy of the majority, or they held off making a decision – then the individual ritual components (the civil ceremony, the church ceremony and the wedding reception), were separated (25.6 per cent got married in a civil ceremony on the originally planned date, and 5.8 per cent at an earlier date). To make the separately held wedding reception a real celebration, 13.4 per cent of respondents also postponed their church wedding along with the wedding reception. Eighteen (18.1) per cent of respondents asked for a ceremony leader from a wedding service provider to conduct the confirmation ceremony, and 2.5 per cent decided to augment their original plan with a church wedding ceremony. During the COVID-19 period, weddings and wedding receptions with ceremony leaders became so popular and thus visible that during the second wave of the virus, on 10 November 2020, the *Hungarian Gazette* (§ 6) mentioned that, in addition to married couples, witnesses, parents and grandparents, siblings and children, only registrars or ceremony leaders could be present.

Brides who were 'originally' not thinking of holding a civil wedding and wedding reception on separate days but for the reasons discussed above saw this as an option tried to learn as much as possible about how it could be done and what the best practices were. Thus, for example, in the preparatory stages of decision-making, brides posed many questions to brides, married women, and wedding service providers who had real, personal experience with this. For example, how does it feel to experience the confirmation ceremony; how 'real' is it; how did the wedding guests react to it, and so on. Parents, friends, and acquaintances belonging to older generations could not really help with these issues – only those could who were familiar with the world of contemporary weddings. So, while parental and family ideas and decision-making roles were slightly re-evaluated and (temporarily) rearranged, in many cases this meant that members of the older generation were relegated to the background, which sometimes caused very serious conflicts: the influence of online discourse dominated by brides and wedding service providers grew significantly.

The majority, who were not satisfied with smaller weddings and therefore postponed their wedding receptions or the civil ceremony along with the reception, or those who simply 'waited,' hoping that the restrictions would end, mainly tried to stick to their original plans (47.4 per cent). As a bride living abroad put it briefly after the cancellation of her wedding in Hungary scheduled for September: 'And what is going on inside is frustration, defiance (then it should be a year later, but it will be what we want, and we shall not give up our ideas because of circumstances) and ultimately hope, but hand in hand with doubt, which by now has become unavoidable.'[16]

Those who clung to the idea of a big wedding feast saw it as a celebration with friends and family that would have been meaningless to them in the context of a narrower, more puritanical, service-free civil wedding — the true 'rite of passage' would not have taken place. More than one-third (36.3 per cent) said that the wedding was a family holiday and 36.8 per cent added that it was important for them to say their promises and vows in front of their family

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16   E-mail excerpt, female, approx. 30 years old, Vienna, September 5, 2020.

and friends. Only 2.9 per cent of respondents to the COVID questionnaire also mentioned that not only they but also their parents insisted on a public, larger-scale, service wedding reception and wedding ceremony. Thus, in addition to rejecting and eliminating 'traditions,' the reorganizations were also motivated by references to norms and traditions. The latter were mentioned more as preferred patterns, norms, or models to be adopted; they were evaluated positively. For example, many of the marriage planners and re-planners insisted on big weddings, big family celebrations, spectacular rites, and ceremonies, and at the same time rejected puritanical, guestless, simplified civil ceremonies because they thought the former were traditional and therefore normative. They considered the former format to be a legitimate model that they tried to conform to because 'it used to be that way.' Referring to the tradition of large-scale weddings as a model also proved to be a narrative strategy during COVID-19 that could be used to argue in favor of earlier, pre-restriction types of weddings and/or those that coincided with one's own ideas. The signatories of the above-mentioned online petition for holding wedding receptions referred to the customary order of weddings in thousands of comments. Namely, that in fact the wedding reception is an essential, traditional part of getting married. The comments contained dozens of references to traditions and customs, as well as to traditional wedding receptions, as their source of argument. They stressed that betrothed couples, by holding a wedding reception, were merely intending to comply with traditions and customs: 'We would like to hold the wedding reception along with the civil wedding'; 'I would like to be able to have both the reception and the wedding ceremony according to Hungarian customs' (May 3, 2020).

Couples also identified deferred weddings, cancellations of certain services, and temporary cancellations of wedding receptions as previously existing plans that could be adapted to the circumstances. The legal background for these decisions to cancel, postpone, and replan wedding receptions and especially wedding services was the state of emergency ordered by the government due to COVID-19 that constituted *force majeure*. *Force majeure* is an unforeseen situation (which fully describes a pandemic emergency) for which neither party is responsible. According to Section 6 of Article 185 (2) of the Hungarian Civil Code: 'If the contract is terminated for a reason for which neither party is responsible' – thus, in view of the unforeseen *force majeure* situation due to the pandemic – the service provider has to return the down payment to the customer. At times this was not so easily accomplished in practice. It only happened if the parties had earlier signed a contract and if the customer decided to claim back the down payment. This step was not entirely automatic, and several online legal aid teams were formed to deal with such problems. For example, in the case that weddings and wedding receptions were planned for farther away in time, as the scope and timing of the restrictions were not known in advance, it was not possible to refer to *force majeure*. The most economically viable and best supported strategies proved to be restructuring, deferrals, searching for new dates, and waiting. The biggest structural barrier to postponements and reorganizations, primarily from the point of view of the service industry, was the well-founded fear of the piling up of future weddings and receptions in fall and winter. That is to say, it became clear that, together with the weddings that were being postponed and those originally planned for the following year, as well as newly scheduled weddings, it would hardly be possible to find free dates, because, for example, couples still preferred weekends for their *Big Day*. Not surprisingly, wedding service providers began to argue for weekdays as ideal wedding days, which option had thus far been overlooked. The interests of wedding service providers were best served by postponements, renegotiations of dates with customers, holding on to reservations and advances, and the planning of the following year's expenses and revenues (includ-

ing a potential increase in service fees). They primarily supported cooperation, the finding of mutually satisfactory solutions and compromises, as well as the making of decisions that pointed in this direction. From the point of view of customers, in the case of cancellation, they tried to get their deposits back, while in the case of postponement they hoped to find and hold on to 'good' dates and venues. If the service providers were inflexible, which made it difficult to find the most suitable dates, customers looked for new providers. While most questionnaire respondents (69 per cent) did not cancel services at all, 74 per cent held onto their personal *dreams* and postponed wedding seeking, above all to find another date suitable for everyone. Either they hatched a completely new, definitive Plan B, or a conditional one: 'We wouldn't cancel anything, we would just set a new date for the postponement of the wedding reception by negotiating with the service providers and adjusting it to suit everyone' (May 1, 2020; Győr-Moson-Sopron county; the planned wedding date was August 5, 2020; no new date at the time); 'We didn't cancel anything, we just rescheduled for next year' (May 11, 2020; Borsod-Abaúj-Zemplén county, prior to decision, original wedding date June 20; new date May 22, 2021). Fourteen (14.3) per cent said that during the redesign of the wedding reception they would have to give up on earlier dreams, 11.7 per cent were still uncertain about this issue. However, 7 per cent had decided to cancel some services, 4 per cent sought additional ones besides those they had already booked, and 5.8 per cent stated that they thought it would be necessary to change service providers. The cancellations were mainly due to the need to reduce costs. Due to their precarious financial situation, respondents decided to cancel services, or more generally to reduce the wedding-cum-reception budget (4.7 per cent) or to limit the number of guests (8.4 per cent) (cf. Howard & Ortiz, 1971).

### 2.4.2 Maneuvering between structures – Innovation

Moving on to the innovative steps taken in response to constraints at the level of strategies and practices, one of the most striking examples was the formal transformation of photographers into 'wedding witnesses.' This began to appear as a strategic 'countermove' in the course of replanning weddings when the presence of photographers and videographers also was banned at civil ceremonies. Instead of one or both 'official' witnesses, it was the photographer or photographers who participated in the ceremony. Competing with this line-up was the 'witnessing' of parents, especially of mothers, in cases when they could not have attended their children's wedding in any other way due to severe restrictions at the local level. The 'witnessing' of photographers was supported by both couples and wedding service providers, albeit with different intentions: 'My God, let the photographer and the videographer be the witnesses. At most, they won't be in the photos, but at least professional shots will be taken' (wedding service provider, 18 April 2020); '[...] For my part, I'm going to bring the photographer into the wedding ceremony come hell or high water. If I must, I will "adopt him" as my "brother" for the duration as – what a surprise! – he knows a bit about photography. And if it turns out that it really gets bad, I'll pay the fine (there is little chance of that)' (bride, April 18, 2020).[17]

### 2.4.3 Overlooking recognized structures and 'drifting along with the tide'

Overlooking recognized structures primarily meant minor violations of rules and a more or less strategic application of a 'philosophy' of willful ignorance: namely, if you don't ask about something, you cannot get a negative answer. Thus, for example, it often happened that

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17    Members of wedding planning Facebook group.

the couple to be married invited more people to the civil ceremony (which had a defined maximum number of attendees) than were allowed in the hope that they would still be admitted. Often such moves turned out to be successful. Also, small weddings were secretly held in the courtyards of private single-family houses, or at restaurants that had an outdoor space, and many people did not bother to wear a mask. These practices and ideologies of disregarding recognized structural constraints directly contradict 'classical' studies that posit the structural determination of individual decision-making, as are well known from the social science literature of the 1950s, 1960s and 1970s (Goodenough, 1955; Freeman, 1961; Horowitz, 1967; Howard, 1970). However, in the present case we are not merely dealing with the passive acceptance of structural constraints, but much rather with an active strategy and/or normative ideology that leads to and legitimates the temporary suspension of one's own agency in decision-making due to the uncertainty and the difficulty of making choices under these circumstances. Many of the difficulties and anxieties associated with decisions and choices can be avoided by drifting along with the tide, allowing events to take their course, as ever-changing structural constraints allow us to act when decisions must eventually be taken. 'Letting go' of control was often associated with the religious or spiritual notion that Fate or God would decide the outcome. 'So now I'm like, let's flow with the tide, as has been discussed, wait until June, and if we see in June that this whole thing isn't going to work, let's finally just forget about this year, and then let's just prepare for 2021.'[18]

### 2.4.4 Attempts to transform structures

One of the most spectacular examples of attempting to effect change in legal-political structures was an online petition that responded to a government announcement on April 30, with which the signatories – mostly prospective brides and wedding service providers – wanted to make it possible to plan for and hold spring-summer weddings and wedding receptions. In their own interpretation, they were successful. The petition that was started on the initiative of a wedding service provider (a wedding planner) was signed by about 13,000 people, mostly brides and service providers (as well as family members, friends, and grooms). Two weeks after the launch of the petition, the partial lifting of the earlier regulations and restrictions followed: as a result, from June 1 in the countryside and from June 15 in Budapest the wedding season could begin. 'Thank you to everyone who supported our initiative by signing. In the countryside and in Pest County as well, from 06.01 the government will allow wedding receptions to be held with up to 200 people. Congratulations to all engaged couples' – stated the initiator of the petition on May 14, and the signatories themselves interpreted the newly introduced easing of the restrictions as a success, and as a genuine change in structural constraints. However, this can also be contextualized differently. The significant decline in the number of weddings that was also discernible at the level of CSO statistics and manifested in the mass postponement and cancellation of civil ceremonies may also have influenced the legislators. I would argue that all of this may have played a significant role in easing restrictions on weddings, as the government narrative supports an increase in the number of marriages and, with this, birth rates.

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18    Interview excerpt, woman, approximately 30, Budapest, May 8, 2020.

*2.5 How do decision-making ideologies and strategies work?*

Finally, it is also important to realize that the decision-making strategies outlined above and the practices that follow from them are not exclusive; they appear in succession or simultaneously as alternatives that appear and reappear, situationally, numerous times among the practices of marriage planners. Thus, for example, one of my interviewees in Budapest sometimes put her plans on hold during the COVID period and surrendered to the decision-making situations brought about by structural constraints, and at other times (by even signing the online petition) attempted to change the structural constraints, while at the same time actively researching contemporary wedding practices with an eye to adapting them to her reorganization plans. Thus, she thoroughly researched how a *lakodalom* 'detached' from a wedding ceremony would work, and thought about how all this was compatible with her own preconceived notions. In possession of the information, she also produced B and C plans (postponement by an entire year as opposed to by a few months, holding a civil wedding at the original time, postponing the wedding reception). Finally, her civil wedding and wedding reception were held in July 2020 on two consecutive days, in a manner similar to her original plans — the first day a civil wedding, the second day a confirmation ceremony with a ceremony leader — on the date that was originally planned. My interlocutor in Kaposvár also put her plans on hold several times, postponing or suspending decision-making on the grounds of uncertain, ever-changing decrees, and then in the wake of the April 30 new decree banning events until August 15 decided to adopt an alternative wedding strategy as a Plan B (church and civil wedding ceremonies on the original date, wedding reception with confirmation ceremony with a ceremony leader postponed by a year). Then, following the lifting of the wedding restrictions in May, the couple decided on holding the *lakodalom*, church and civil wedding on the original date, in August. Thus, as we have seen in the previous examples, decisions and choices leading to decisions are not one-off events but rather multi-directional processes accompanied by a series of considerations (cf. Luhmann, 1995, pp. 296–297; 2005, pp. 85–89) – although what Luhmann did not deeply take into account was that these choices are all closely related to the reflexive recognition and evaluation of structuring conditions and, as we have also seen, to an active search for and the innovative creation of opportunities and the information leading to them.

## 3. Conclusion

So, what is the reason for the otherness and similarity of COVID weddings? During the quarantine period, from the legislative point of view, the primary goal was to ensure the ease of getting married in a legally valid way (without services), acquiring proof of legal marriage, and 'obtaining the papers.' This legal-political will of the legislature was confronted with the different interpretations of the complex notion of *lakodalom* by wedding planners and wedding service providers, as well as by betrothed couples and related needs that point beyond a desire to merely obtain papers. We have seen that despite – or rather in the face of – changed circumstances, the majority of couples adhered to the ideas and dreams associated with their 'original' 'habitual' (cf. Bourdieu, 1977) ideas, while a smaller proportion of them gave up on more expensive, unnecessary, redundant services, choosing cheaper and absolutely necessary ones instead. They did this because their primary preferences, expectations, and ideas encountered economic and legal constraints, and circumstances beyond their control hindered their implementation. They sought new opportunities, new and adaptable patterns, and in the meantime they recognized and interpreted the structural constraints that could potentially influence their weddings,

maneuvered between them, or just circumvented them; while at other times seeking to create new structures through their individual and community practices.

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## Music industry workers' autonomy and (un)changing relations of dependency in the wake of COVID-19 in Hungary: Conclusions of a sociodrama research project

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### Abstract

The COVID-19 pandemic restrictions in 2020 included the cancellation of live music events in large numbers, leaving a majority of music industry workers – not only musicians, but also sound and light technicians, roadies, managers, and promoters – at least temporarily out of work. The situation was characterised by general uncertainty, both with regard to future restrictions or their easing, and with regard to the willingness of the Hungarian government to lend a hand to the industry and its workers. The question of state support and reliance on it was thus brought into sharp focus – the fate of the music industry and industry actors taking a stance received significant media attention, and online discussions involving organisers and concert or festival promoters abounded, especially during the first two 'lockdown' months. Our paper explores the collective images, perceptions, and attitudes of cultural workers working in the Hungarian music industries related to their own work, their creative autonomy, and the relations of dependence in the industry through an analysis of six sociodrama groups undertaken with the participation of music industry workers before and during the pandemic. We explored, first, how workers view the role of the state and the market in their work, and the playing field in which they are situated, and whether and how the pandemic crisis has affected this. Second, what kinds of potential strategies of coping and surviving the workers identify in light of the crisis situation.

**Keywords**: music industry, autonomy, state, sociodrama, cultural labour, cultural policy

## 1. Introduction

As has already been widely reported and documented, the COVID-19 pandemic has had a drastic impact on the music industries[1] and music-making both globally and locally (see e.g. Taylor et al., 2020 for the UK; the Hungarian Association of Independent Labels, 2020; Music Hungary Szövetség, 2020 for Hungary; and posts by various international scholars on

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1    We refer to 'music industries' in the plural following Williamson and Cloonan (2007) to indicate the diversity of the sector and acknowledge the power struggles within it.

the *Working in Music* blog[2]). Lockdown measures worldwide have temporarily put an end to live music shows, leaving musicians, technicians, promoters, managers, and further kinds of workers at least temporarily out of work. Rehearsing or doing studio work has also been made difficult, thus musical activities have mainly been relegated to the space of the home and to online channels.

Although live music was a growing sector of the music industry worldwide (Brennan & Webster, 2011), on the comparatively small and peripheral Hungarian music market the live sector had become an especially important source of income for music industry workers in the years leading up to the pandemic. This is partly because the recording sector was hit comparatively hard in the wake of the loss of income from record sales following digitisation. The 2018 *ProArt Music Industry Report* estimates the income of the recorded music sector at approximately 52 million euros (18.4 billion HUF), and the value of the live sector (dominated by festivals) at almost twice that, close to 100 million euros (35 billion HUF; Virágh & Főző, 2018, pp. 6–7). Moreover, live music had become crucial for musicians and music industry workers not only in terms of direct income, but also for their popularisation. This, combined with the general precarity of music industry workers due to the high proportion of freelance or self-employed workers and those working for micro-enterprises (Antal, 2015, p. 93), the prevailing project-based nature of their work, the seasonality of the industry (which contributes to the unevenness and also unpredictability of income), and strong economic inequality (Virágh & Főző, 2017, p. 17) left this segment of Hungarian workers highly vulnerable to measures related to the pandemic.

The past six years have seen growth in state funding of popular music in Hungary. The former Cseh Tamás, now Hangfoglaló Programme, organised under the scope of the National Cultural Fund (NKA), was introduced by the third Orbán government in 2014. Its main source of funding is a percentage (25 per cent) of the blank media levy collected by the Artisjus copyright collecting society. The fund supports writing, recording and video production for artists, national and international tours, support for live music venues, as well as popular music education and heritage. On the one hand, this is the first instance in which popular music has received significant and wide-ranging state-level recognition and support since the regime change. At the same time, the fund has also helped to establish dependency on the state that may be fragile due to its contingency upon political shifts. This increasing dependency on the state, on the one hand, and on the gatekeepers of the live music sector such as festival promoters, on the other, is accompanied by the very low level, almost non-existent, of union membership, and the ambivalent role and status of professional and lobby groups, such as the Music Hungary Association.

In our research,[3] we explore the collective images, perceptions, and attitudes of cultural workers working in the Hungarian music industries related to their own work, their creative autonomy, and the relations of dependency in the industry. Specifically, we first ask how workers view the role of the state and the market in their work, and the playing field in which they are situated, and whether and how the COVID-19 crisis and restriction measures have affected this. Second, what kinds of potential strategies of coping and surviving do they identify in light of the crisis situation, and what do these tell us about the workers' perceptions of their own work and their autonomy. Our hypothesis was that the crisis situation could bring into sharp focus pre-existing dependencies in the industry, but perhaps also place them in

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2    Working in Music is available at https://wim.hypotheses.org/ Accessed 11-12-2020.
3    The sociodrama research analysed here is part of a larger research project supported by the Hungarian National Research, Development and Innovation Office under Grant FK-128669.

a new light. This may also create impetus for change, since through their work such agents may not only reproduce but also challenge the system. To answer these questions, we rely on the analysis of six sociodrama events undertaken with the participation of music industry workers before and during the pandemic.

## 2. Theoretical approaches to creative autonomy: reinserting the missing state

References to creative autonomy have been central to discussions of labour in the cultural industries. Banks argues that cultural work is often assumed to be more 'inherently autonomous' than other types of work (Banks, 2010, p. 252). In Western economies, cultural or creative autonomy is generally interpreted as independence from the market (Banks, 2010, pp. 252–253), expressed in the distance that is maintained, or the lack thereof, from a market or corporate logic that characterises the cultural industries, and the demands and constraints of the commercial world. In other words, the core of the definition of autonomy involves countering the capitalistic, competition-based, profit-seeking principle of the industrial production of culture that is understood to constrain creative and cultural freedom. This is widely known and referred to as the *art* versus *commerce* dilemma, which concerns both cultural products and their consumption, and cultural labour – and thus the autonomy of workers.

In terms of the autonomy of labour in the music industries in particular, the negative ring of 'selling out' – of succumbing to the lure of profit to the detriment of creative freedom – has been widely documented to structure the careers of not only musicians, but also, for instance, record label owners and employees (e.g. Hesmondhalgh, 1999). Holt and Lapenta refer to autonomy as independence in terms of employment conditions in the cultural industries, but also as autonomous 'subjectivity in self-realisation' (Holt & Lapenta, 2010, pp. 225–226). With regard to the inner-self dimension of the worker, the critical theories of Foucault (2008 [1979]) and Bourdieu (1977), which draw attention to the internalisation and psychological reproduction of social structures and power hierarchies, are particularly valuable. Neo-Foucauldian approaches such as McRobbie's (2002), as Banks demonstrates, focus on the mechanisms of (self-)governance through which the logic of the cultural industries is internalised and readily reproduced by cultural workers through ideologies of (individual) creativity and techniques of self-management (Banks, 2010, pp. 256–7). Autonomy thus becomes a 'false freedom' insofar as the demands of neoliberal capitalism, such as the flexibilisation and freelancing of work and the 'de-differentiation' of work and non-working environments (p. 257) (wherein work is pleasure – this is also often referred to as the 'do what you love' doctrine) are welcomed as inherent to the thriving of creativity. The contemporary capitalist system, in other words, reproduces and reinforces its mechanisms through the constitution of neoliberal – creative – subjectivities.

Literature that focuses on cultural or creative labour is dominated by studies that focus on the countries of the global core – in particular, the United Kingdom and the United States. One limitation we may identify that arises from the very position of this work as knowledge produced within the core of the capitalist world-system (Wallerstein, 2004) is the lack of attention to the role of the state as an actor. It is research focused on the creative economies of non-Western countries such as China, where the role of the state is perceived much more directly, that has drawn attention to this theoretical bias. Wang, for instance, 'stresses [that] there is always "a state question" in China's cultural industries and popular cultural studies' (Wang, 2001, pp. 35–52, quoted in Lin, 2019, p. 54). While such a statement implies that the state is less relevant as an actor in relation to cultural autonomy in Western countries, we would like to argue that the capitalist state (Jessop, 1982) and the ways in (and extent to)

which it reproduces capitalistic relations or mitigates the logic of capital need to be rendered the subject of empirical analysis. Music certainly does not remain out of the reach of cultural policy (e.g. Homan et al., 2015). Second, it is also affected by the broader regulatory framework determined by state apparatus. Cloonan and Street (1997), in their exploration of the relationship between popular music and politics, helpfully summarise the areas where political actors, including the state – both the nation state and the local state – may impact, influence, control, as well as draw upon, popular music: they distinguish between means of 'policing pop', which include legislation, policy making, local regulation, and 'moral crusades'; 'exploiting pop' for political purposes; 'promoting pop' through indirect promotion, such as through public service radio; direct support; the political economy of pop; and 'cultural politics.'

According to accounts focused on Hungary, the Hungarian cultural world, including popular music, has a historical legacy of being particularly state-dependent under socialism, even though the extent and scope of state control was modified along with shifts in the economic and political system. Ideologues strictly prescribed aesthetic principles regarding composition in the early 1950s based on central Soviet directives (Ignácz, 2020). Yet the difficulty, and ultimately lack of success of implementing these into songwriting practice nevertheless still left songwriters with some room for creativity (ibid.). Such aesthetic control was combined with means of institutional and infrastructural control – ultimately increasing in weight in relation to aesthetic means in the Kádár era. This was realised through a state monopoly on the production – recording, record manufacturing, and publishing – of music as well as through its main channels of dissemination; namely, radio and television. The state also asserted power through the direct control of live music through means of a permitting system and the policing of events. Moreover, musicians also practiced self-censorship (Csatári, 2018), yet self-censorship arguably remains a reflective process whereby, on the surface, the creative worker attempts to adhere to state ideology, while simultaneously devising creative ways of subtle resistance. In other words, the mentioned forms of state control do leave some room for striving for creative autonomy. 'Creativity' in this sense refers to a kind of resourcefulness, as well as the mentioned reflexivity that helps one make use of the opportunities provided by the system – in a similar way to Brazilian television set assemblers in Mayer's (2011) study, who devise new ways to help them survive on the factory floor. In Hungary, resourcefulness may also be observed in relation to the use of infrastructure, such as 'off the grid' underground spaces – private homes served as important locations for performances, practice, recording, as well as networking through house parties or the informal trading of tapes.

Szemere's (2001) account of the underground music world of 1980s' and 1990s' Hungary focuses on the pre- and post-transition careers of musicians and offers insight into the intersection of state-level politics, subcultural logics and industry-level mechanisms following the regime change. She suggests that the particular counter-cultural discourse of autonomy characteristic of the socialist era (that is, autonomy from the political system in a cultural and artistic sense), effectively disappeared with the transition (Szemere, 2001, p. 109). What emerged in its stead was a particular and characteristic post-socialist set of attitudes, appearing partly in response to the tension of the new capitalist relations, competition, privatisation, quickly growing inequalities and job insecurity – and partly in response to the ideology that located this phenomenon within a moralised discourse of progress and involved (the difficulty of) 'catching up' with the West; in other words, Hungary's – and Eastern Europe's – 'backwardness':

> The stories [of post-socialist independent record labels also] exemplify […] a conspicuous trend in private and public discourses surrounding the business world in postsocialist Hungary, which is

typically cast in a moral framework. Complaints of 'ruthlessness', 'lawlessness', 'carelessness', and the 'Wild East' predictably recur. Today's entrepreneurs, according to […] widespread belief, are desperate to make as much money as fast and with as little effort as possible. Business, from this perspective, had become indistinguishable from crime. (Szemere, 2001, p. 148)

This kind of moral and cultural framing, as the author herself observes (p. 149), was blind to the structural difficulties surrounding entrepreneurship and self-employment which quickly sprang up following the regime change, including intense competition and a lack of support services (Roberts & Tholen, 1998, p. 60), which ensured that enterprises mostly relied on informal support networks of friends and relatives (ibid.; Szemere observes the same in relation to the independent record labels she discusses). References to the 'Wild East', in addition, evoke the '*topos* of west European moral superiority' – an internalisation of what Stuart Hall calls 'the *longue-durée* tendency of treating eastern Europe as "barbaric" [that] has been part of the West's production of its "internal others"' (Hall, 1995, p. 189, in Böröcz, 2006, p. 127).

The 2010 political turn in Hungary and the government-titled 'System of National Cooperation' can be understood as a new regime of capital accumulation and hegemony building (Éber et al., 2019). State cultural policy during this regime, as Barna et al. (2019) argue, can be described through the two parallel processes of *incorporation* and *ideological control*. While incorporation refers to the inclusion of cultural producers through new or transformed institutions, through which they are able to obtain resources and prestige, ideological control refers to more direct conservative and ethno-nationalist cultural policy. The latter is typical in areas that traditionally involve high levels of state involvement and are imbued with high symbolic value, such as literature and the fine arts. Ideology production and the establishment of state hegemonic strategies are achieved through the transformation of ownership relations and financing, the operating and legitimising of new institutions by the government in cultural spheres, the 'occupation', transformation, or closing of pre-existing institutions, and the allocation or withdrawal of funding.[4] The authors also emphasise that '[c]hanges taking place in the area of cultural production are multi-layered: a market-based–manager perspective and an ideology producing and maintaining function are simultaneously present both between and within subfields' (Barna et al., 2019, p. 147).

## 3. Research methodology and COVID-19 as research context

### 3.1 COVID-19 as a research context

Since our research on music industry workers started before the pandemic, COVID-19 and the associated crisis created an unexpected context. While our research questions did not change, we had to adjust our methodology to the lockdown situation and shift the sociodrama events into an online context. The focal points of the drama events, while still aligned with our research question, were also adjusted to the main concerns, questions, and needs of participants that arose in the crisis, directly affecting their work. In Table 1, we indicate the chronological progression of important political and industry events, along with the date and thematic focus of the six drama events that form part of this analysis.

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4    New institutions include the National Film Fund, while the strategy of transforming pre-existing ones can be observed, for instance, in the cases if the Hungarian Academy of Arts, the Public Foundation for the Research of Central and East European History and Society, and the Petőfi Literary Museum (Barna et al., 2019).

Table 1: *The rhythm of political and industry events related to COVID-19 and the date and focus of the drama groups*

| Important political and music industry events related to COVID-19 | Event dates | Drama dates | Drama focus points |
|---|---|---|---|
| | | 11 Dec 2019 | dependencies between music industry actors |
| | | 19 Feb 2020 | behind the scenes: known and unknown secrets – whom do they benefit? |
| lockdown announced, ban on events | 11 March 2020 | | |
| Artisjus + EJI grants announced | 24 March 2020 | | |
| Budapest Park open letter | 15 April 2020 | | |
| | | 13 May 2020 | "what do we need in order to survive? (looking for resources)" |
| wedding parties allowed outside of Budapest | 1 June 2020 | | |
| music events below 500 allowed all over the country until 15 Aug | 15 June 2020 | | |
| | | 16 June 2020 | "when will it end? (crisis, no resources, no strategies)" |
| | | 18 June 2020 | "will it return to what it used to be? (coping strategy: future projection)" |
| Popular Music Strategy of Szilárd Demeter | 20 June 2020 | | |
| "Minister of Innovation and Technology: 15 August lifting of restrictions uncertain" | 14 July 2020 | | |
| official: restrictions remain after 15 Aug | 30 July 2020 | | |
| #coVideo 'behind-the-scenes workers' campaign | 3 Aug 2020 | | |
| | | 4 Aug 2020 | "how to help retain music workers (responsibility for others)" |
| Warehouse Gigs announced | 5 Aug 2020 | | |
| symbolic date: until 30 July, expected date for restrictions to be entirely lifted | 15 Aug 2020 | | |

The 2020 spring lockdown period, announced on 11 March, included a total ban on live gigs. At the same time, there were no industry-wide support measures from the government – although self-employed workers received some tax support. The National Cultural Fund, Artisjus – the copyright collecting society – and the Performer's Rights Protection Association Office (EJI) both supported artists on the basis of grants, but the 'background workers' of the industry – technicians, roadies, managers, and photographers – were not included among the potential recipients. The awarding of these grants and the circulation of the names of the supported artists generated substantial media attention, including social media posts and debates, which engaged with the issues of the deservingness of well-known musicians of government support and the responsibility of the state to support artists. Another debate involved the ticketing policy of live music venues and events during the crisis: while the future of live

events was uncertain, the venue Budapest Park issued a statement informing their customers of their difficult financial situation, requesting their understanding and patience regarding ticket refunds. The statement was signed by multiple other venues and events, but was followed by a social media backlash, which involved many music venues being accused of being 'profit-hungry' and showing a lack of solidarity with their customers. Our first online event was conducted during this period of enhanced media attention to the music industry and its workers, and some of the participants were themselves directly involved in the ongoing and heated debates.

The restrictions were partly lifted for the summer period, and musical events with up to 500 participants could be held all over the country from 1 June. The government named 15 August as a potential date for the lifting of the remaining restrictions, which meant that those festivals that had not entirely been cancelled at this point were potentially moved to the second half of August. On 30 July, the government announced that restrictions would remain in place. Within the music industries, there was widespread unrest and frustration over the course of July with regard to the uncertainty of the possibility of holding events in the remainder of the summer, and online campaigns were organised to show music industry workers' desire to work (e.g. the #zenélnénk [we would like to play music] social media campaign) and to emphasise the value of their work (e.g. the #coVideo campaign aimed at making visible the largely invisible labour of technicians). In addition to economic hardship, the mental health of artists also received some media publicity. Two of our online dramas were held in June, while there was still hope, although a lot of uncertainty, regarding the lifting of restrictions, and the final event was held four days after the 30 July announcement.

During the same period, Szilárd Demeter, the head of Petőfi Literary Museum, was awarded a new position as Ministerial Commissioner for the Renewal of Hungarian Popular Music from 20 June, and released a detailed five-year strategy for popular music in this role, which he had compiled with the help of music industry experts. While the appointment of Demeter himself was debated in the music industry for political reasons, the strategy itself was welcomed by many. Nevertheless, the government music industry support scheme that was announced on 5 August – namely, the 15 million euro (5.3 billion HUF) 'Warehouse Gigs' [Raktárkoncertek] programme – apparently sidestepped Demeter, the Hangfoglaló Programme, as well as Music Hungary and other industry groups in favour of the Hungarian Tourist Agency as organiser, along with a company argued to be closely associated with the government as the commissioned stage technology firm (Sajó, 2020). The programme enabled 300 acts, selected from three main genres, to perform at a 'warehouse' venue without an audience – the performance to be recorded and archived, and the musicians to receive an outsized performance fee. Again, the programme was highly divisive within as well as outside of the industry and sparked intense (social) media debate. While many participating artists openly embraced it as an opportunity, some bands publicly announced they would distribute the support they would be receiving among their broader team, or hand over the entire amount to a different band more in need of financial support, or to a fund set up to give succour to background workers.

### 3.2 Offline and online sociodrama as research method

In our research, sociodrama was used as a qualitative research method, whereby the researcher investigates the topic together with the group whose members are involved with the research topic (Gunz, 1996; Horváth & Oblath, 2016; Ius, 2020). The essence of the method is that the group, after formulating the issues that currently concern them, develop these issues through

Table 2: *Setup of drama events (pandemic-era events are in bold)*

| Date of drama event | No. of participants | No. of new participants | Occupation of participants | Gender of participants: F/M | Place of residence: Budapest/ other town |
|---|---|---|---|---|---|
| 11 Dec 2019 | 6 | 6 | 2 programme managers, musician/ social media manager, PR manager at venue, artist manager, tour manager/communication manager | 2/4 | 5/1 |
| 19 Feb 2020 | 7 | 2 | 2 musicians, musician/social media manager, PR manager at venue, programme manager, artist manager, tour manager/communication manager | 2/5 | 6/1 |
| 13 May 2020 | 3 | 0 (all 3 participated for 3rd time)" | programme manager, tour manager/ communication manager, PR manager at venue | 2/1 | 2/1 |
| 16 June 2020 | 7 | 7 | 2 musicians, programme manager, venue owner, manager, DJ/promoter, sound technician | 2/5 | 3/4 |
| 18 June 2020 | 3 | 3 | musician, promoter, sound technician | 1/2 | 0/3 |
| 4 Aug 2020 | 6 | "3 (continuation of 16 June group)" | musician, DJ/promoter, sound technician, manager, promoter, DJ/social media manager | 2/4 | 3/3 |

dramatic enactments. This process is facilitated and led by the drama leaders (in our case, one of the researchers acted as a drama leader, along with a partner). Dramatic enactment, as it reveals the various perspectives of the actors in the given situation, results in a deeper understanding of the investigated topic, and ultimately a differentiated, shared understanding that integrates multiple aspects, which are eventually expressed verbally by the group. The question-seeking phase in the drama (Browne, 2005; Minkin, 2016) takes place in verbal form when the participants share their thoughts. As these thoughts are formulated at the beginning of the group situation, we regard them as thoughts that are more controlled and information that can be used directly at that time. The enactment phase takes place through roleplaying, resulting in the emergence of more spontaneous and less controlled thoughts. At the same time, what is revealed in the enactment is not the expression of the speaker's views, but how the speaker experiences the given role and perspective. The last, integration phase of the events again takes place verbally, so this is again not an enactment situation. However, compared to the initial phase, these statements are often more honest and differentiated in light of the experiences of the enactment.

The method is suitable for an analysis of concrete situations, such as, in the present case, the impact of COVID-19 and the lockdown restrictions. We are able to observe not only the situations or scenes created by the participants, but also their feelings, attitudes, and opinions regarding these – both are interpreted as data. Sociodrama events are less controlled and more spontaneous than focus groups, which suited our research situation involving predefined research questions but also a rapidly shifting context. The events made visible mechanisms and processes of the (re)production of power relations, hierarchies, and dependency in situ. Moreover, they helped us – as well as the participants – to deconstruct what is generally thought of as shared knowledge or consensus. This was of particular relevance for our research

focus, since the music industries, the work and situation of musicians is highly mediatised and takes place in the public sphere in general. In addition, as mentioned, this was heightened during the pandemic period through (social) media debate about, for instance, the value of music, the industry, and the work of musicians. We purposefully aimed to use a method that would detach participants from usual or dominant music industry discourses and narratives – especially since some of the participants regularly speak and share their opinions at industry events, roundtable discussions, and/or on social media.

The limitations of the method, on the other hand, include the fact that it works best if focused on concrete questions or issues bought up by the group, making comparisons difficult. To offset this disadvantage, we applied a system of coding for the analysis, which is detailed below. Although sociodrama as action research is usually applied to vulnerable groups, the method is generally used in a wide variety of fields (including education and organisational development). This means that its pros and cons remain valid regardless of the participants' social background or communication skills.

Table 2 presents the setup of our sociodrama groups, including information on the number of participants, the number of new participants (to indicate the extent of continuity among groups), their occupations, gender, and place of residence. We recruited participants with the help of a research assistant who is also a music industry worker, initially utilising her contacts and then employing the snowballing technique. We made no restrictions regarding genres of popular music, and we aimed to cover a geographical range as well as a variety of industry jobs and roles. Nevertheless, there are many limitations associated with this relatively small sample; most importantly, the fact that participating in the dramas – especially several times – requires more commitment than, for instance, participating in a regular qualitative interview. This means that workers who are committed to sharing their opinions, and in some cases, even used to having representative roles (e.g. at music business events), were overrepresented. Some of the participants have important gatekeeping positions in the industry, and are partly integrated into institutions of the state support system through such positions. Nevertheless, the groups were heterogeneous in the sense that they also included musicians and managers who do not occupy any prominent representative positions.

The first two, pre-pandemic events were conducted offline. For these events, the topics were predetermined by the researchers, and membership of the two groups was consistent to the extent that it was practically possible – the researchers encouraged continuity, and the participants were also willing to further continue to explore the issues raised during the first occasion (membership was not entirely identical because some members dropped out, while we enabled others who were originally interested but unable to join for practical reasons during the first occasion to join later on). The first online, pandemic-era drama was also conducted with members who had participated in both preceding events. The second and fourth online groups also shared members. For the pandemic-time events, we asked group members to formulate the issues that were currently important to them. Then we looked for the most important common issue together, as worked out through collective enactment. Since the sociodrama groups were in the crisis situation described above during the pandemic, individual issues that were articulated were without exception related to the COVID-19 situation (we list the central issue of each drama in Table 1).

As 'teledrama', online sociodrama is a method that existed before the pandemic (Giacomucci, 2021, pp. 291–308), but the rapid international knowledge sharing during COVID-19 also helped previously inexperienced leaders to emplace the method on online platforms. The 'stage' needed for the drama can be created both by using a whiteboard interface and by

simultaneously showing, hiding, or renaming participants in a conference call – in our case, both techniques were utilized. For our participants, the online context was familiar, since a significant, in many cases dominant, part of the daily work of musicians, managers or promoters takes place through online platforms.

Both the offline and the online events were video-recorded and transcribed in a diary form specifically developed by the researchers for recording sociodrama events (which includes the recording of not only verbal data, but also visual and other aural cues, proximity, etc.). Based on the recordings and the diaries, the two researchers prepared a qualitative analysis of the events separately. As part of these analyses, we listed emerging topics and subtopics from the different phases of the sessions, and analysed them on the basis of the conceptualised research questions. During the listing of the emerging (sub)topics, we categorised the type of information that served as a source of data as 1) information from the participants' own perspective (specific action or communication); or 2) information emerging from a role, where the first type of information is regarded as more 'controlled' by participants. This enabled a comparison of explicit and implicit assumptions, interpretations, and attitudes. Finally, we compared and synthesised these two sets of written analyses with the help of Atlas.ti software: the final analysis is a product of this synthesis.

## 4. Constructions of the state and of autonomy in relation to the state

First, we look at the ways in which notions of the state, and its role in relation to the music industries and their actors were constructed in the drama events before and during the pandemic, and the ways in which the participants understood the relationship between autonomy and the state in this specific spatial and temporal context. This analysis is preceded by a contextual account of state involvement in the music industries during the pandemic.

### 4.1 State involvement in the music industries during COVID-19

The mentioned theorisation of the relationship between popular music and politics by Cloonan and Street (1997) is helpful for analysing state involvement in the music industries in Hungary. With regard to *policy making*, as in the UK, VAT is an important and contested area. As Cloonan observes, tax policy as applied to the music industries becoming an expectation of the government '[contradicts] the assumption that the music industry is entirely "free market" oriented' (Cloonan, 2007, p. 98). In Hungary, reducing the current VAT rate for live performances (27 per cent for indoor events and 19 per cent for festivals) to 5 per cent has in recent years become a measure desired by many – arguably supported by an industry-wide consensus – that the government could introduce to support the industry; this was also a frequent reference point in our dramas. During the pandemic, it was included in the aforementioned popular music strategy developed by Szilárd Demeter, while Music Hungary subsequently commissioned the company PwC to conduct an impact assessment of this (Music Hungary and PwC, 2020). Despite this, the government has not yet made any indication of their willingness to lower the VAT rate. Instead, the main channel of state support is the Hangfoglaló Programme, which, as we have seen, operates through grant applications. The Programme can be considered part of an incorporation strategy through which, while sub-programmes are not designed to correspond to a definable hegemonic cultural ideology, a system of dependency on political actors is created and maintained.

Support for popular music can be *direct* (Cloonan & Street, 1997, pp. 230–231), such as the sponsoring of selected artists or events – which is indeed something the government engaged in during the first 'lockdown' period, for instance, through the funding of the production of songs and videos aimed at reinforcing a feeling of togetherness as well as national pride and 'traditional European values' (e.g. 'Europe 2020'[5]). Such examples can arguably be considered part of the ideological control strategy. Support can also take the form of *indirect promotion*, the primary channel of which is public service media (Cloonan & Street, 1997, p. 230). In Hungary, MR2 Petőfi went through a gradual but sharp transformation after the political turn of 2010 into an international-focused mainstream pop radio station, with much less exposure for Hungarian acts – especially 'alternative' ones – in general than before (Virágh & Főző, 2019, p. 47). Nation-wide radio exposure is provided through this channel to only a select few artists, some of whom are more politically aligned with the regime. This selective favouring of such artists can be a further strategy of ideological control. Finally, the most outstanding development during the period of our research – namely, the introduction of the mentioned Warehouse Gigs programme as the primary means of supporting the industry in the wake of the pandemic –, can be best interpreted within the *political economy* of popular music framework (Cloonan & Street 1997, pp. 231–232). While the regime appears to utilise the situation to gain further ground in terms of capital accumulation, it leaves the majority of artists and music industry workers without support and, in a neoliberal fashion, lets workers absorb the cost of the crisis. Workers instead relied on 'day jobs' – pre-existing or new ones –, their savings, and informal household support for survival. Acts of spontaneous and bottom-up solidarity among industry workers were also reported in our research.

### 4.2 Autonomy and the state before and during COVID-19

In the first drama conducted after the introduction of restrictions (13 May 2020), the response of the participants to the crisis situation was an attempt to map the playing field to answer the question of 'how to survive.' During the main drama phase, three routes of action were outlined by the participants as post-pandemic scenarios potentially available to them. These were drawn up on a whiteboard; the participants then 'walked' the routes through a *walk and talk* technique (Garcia & Sternberg, 2000, p. 67). During the walk, participants assumed a chosen role, explaining their action and enacting their thoughts and feelings along the way. All important factors that were mentioned were simultaneously displayed by the group on the whiteboard with a drawing or inscription.

The role and responsibility of the state and the government – the two were not differentiated – received significant emphasis as factors either enabling participants as music industry workers to complete a particular route, or as contributing to the destruction of the industry – an image projected in the (not necessarily distant) future. The state was predominantly specified as an agent that was potentially failing to act in a way that would protect the interests of the industry and its workers. Although direct references were made to the government's action in relation to the pandemic (namely, the restrictions, their timing and communication, and the forms of support – mostly, the lack thereof), many of the statements were extended to cover the role and responsibility of the state in relation to the industry in general.

This strong attribution of agency that characterised the drama can be contrasted with its representation in the two pre-pandemic drama events (11 December 2019 and 19 February

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5    Available at https://www.youtube.com/watch?v=POcHC_EOgnk Accessed 11-12-2020.

2020), at which the same participants had similarly been involved. Here, both 'the radio' (a crucial channel for the direct promotion of popular music; Cloonan & Street, pp. 230–231) and 'cultural policy' were represented and enacted as being far removed from the actors of the industry and the audience. These were defined through their distance and lack of expertise pertaining to the functioning of the music industries and popularizing of music culture. 'Cultural policy', moreover, embodied a conservative cultural hierarchy through references to classical music. In the 11 December 2019 drama, the participants identified the important industry actors through themselves and with the help of objects in the room. Yet references to the support system entered the pre-pandemic drama events relatively late, and it was not embodied as a central factor. Finally, the shift in the attribution of agency can also be traced in the group's reference to a symbolic object, which was continuous through the first three events, although the meaning changed: during the first two, pre-pandemic events, the object was meant to symbolise the 'economy of Hungary' and was accepted as a given, disadvantageous contextual feature. However, during the first pandemic-time event (13 May 2020), it was referred to as 'the state' and embodied the actor towards which participants voiced their expectations in line with their roles.

The relation to the state received the most attention in the first (13 May 2020) and fourth (4 August 2020) pandemic-era drama groups. The models of the state that were drawn upon in these events can be identified as a redistributive, welfare model versus a laissez-faire, free market model, which were, moreover, closely entwined with images of East versus West. It was from the perspective of a redistributive model that participants articulated their expectations about the state; namely, that if it has 'taken' at other times – i.e. from the industry in the form of taxes – and has been 'pouring onto everything' – that is, extending its incorporating strategy – then it has an obligation to give back now, at a time of crisis. There was, in other words, an acknowledgement of the active influence of the state on the sphere of popular music, dominantly as a beneficiary through its tax policy. The expectation of care – as a 'nanny state' – was expressed quite strongly, in metaphorical language, such as 'everyone has let go of our hands' and, from the perspective of the state, 'come to my bosom.' At the same time, it was made explicit on a number of occasions as an *emerged topic* – that is, through the advocation of one person in the drama, which was then accepted as group consensus – that a laissez-faire state and a free market would be desirable. Market relations consistently appeared as 'pure', and as a form of 'healthy' competition, as exemplified by Western European countries such as the UK and the Netherlands, which were frequently cited as morally good – as opposed to the demoralising, dividing competition in Hungary. The latter echo constructions of the 'wild East' during the 1990s described by Szemere (2001, p. 148). There was no differentiation between the Western socio-democratic welfare state model and the post-socialist state; instead, the Hungarian model was located within an East–West opposition, where the West represented the free market model.

This opposition was already strongly present during the pre-pandemic occasions. For instance, in the sense that the (local and nation-)state, which enables the organising of free events such as town or village days, was identified as an obstacle to a 'healthy' market, which would be represented by the presence of a paying audience. Presently, in accordance with an 'Eastern European tradition', as the drama participants both before and during the pandemic phrased it, the same people always profit; 'the game is rigged', and industry players fight over small amounts of money – musicians are 'dragged through the mud' for amounts like 160 thousand forints (450 euros). The latter opinion was voiced during the 13 May 2020 drama and is a direct reference to the maximum amount paid out by the application-based COVID-19

support scheme of Artisjus and EJI, which, as mentioned above, was a topical issue much discussed and debated in the media at the time. During the drama, this inequality of opportunities, the implied corruption, the lack of fairness, coupled with the lack of sufficient resources, were thus framed within an internalised moral geopolitics (Böröcz, 2006), wherein Hungary is perceived to be 'lagging behind' in relation to the superior West in a perceived linear process of development.

In the second online drama (16 June 2020), the relation to the state was articulated through the representation of institutions associated with the industry – more precisely, advocacy and the collective representation of interests, and participants' relationship and attitudes to these. The National Cultural Fund and the Hungarian Chamber of Commerce and Industry were both characterised and enacted as 'very bureaucratic' and as embodying an impersonal power with whom communication is one-sided. The conversations enacted between industry workers and these organisations permit an insider view of a bureaucratic mode of business. In relation to the National Cultural Fund, the absence of direct communication was emphasised: 'Unfortunately it is impossible for you to speak to [the responsible person] right now – they are having coffee.' Yet the same representation was also transposed to Music Hungary, an industry association (this is when the term 'bureaucratic' was explicitly used in the drama), implying that the type of unequal communication pattern and bureaucracy is embedded into an organisational culture that is also reproduced outside of state institutions. This organisational culture, towards which the participants clearly assumed a negative attitude in this context, has historically been associated with the welfare state – especially by its neoliberal critics. Based on this, the drama participants seemed to tap into the 'new spirit of capitalism', which emphasises workplace autonomy and creativity as opposed to the old Fordist workplace structure, accurately described by Boltanski and Chiapello (2007) as the dominant ideology of the emerging neoliberal regime. At the same time, in the case of the drama participants, this was complicated by the expectations they communicated towards the state. Moreover, the representation of the impersonality of power – not knowing how to pose their questions, or express what they need – is also evidence of a lack of felt agency on their part as workers, which appeared together with uncertainty regarding what 'their task' in the crisis was; what they could do in the present situation. This lack of agency – and the implicit assignment of agency to the state – was suggested not only by explicit statements but also linguistic formulations such as passive questions like 'why has nothing happened?' Regarding the lack of bodies for collective representation that the workers could recognise as their own, as opposed to the organisations themselves which stood for the impersonal and distant power of the state, the dominant articulated feeling was one of power- and helplessness.

So far we have looked at implicit models of the state. We now turn to the articulated relation to the hegemonic ideology and its representatives, since references were also made to ideological control specifically in the pandemic context. There was one mention (in the 13 May drama) of a grant entitled '*Köszönjük, Magyarország*!' [Thank you, Hungary] launched by the Petőfi Literary Museum, headed by Szilárd Demeter, which offered grants to composers for works addressing the 100th anniversary of the Treaty of Trianon (*Pim.hu*, 2020) – an event of major symbolic significance to the Fidesz government. The figure of Demeter kept recurring in the dramas – he was even included in an imagined ideal scenario drawn up by participants in the fourth pandemic-time drama (4 August 2020) among the actors that could, according to the participants, find a solution to the crisis of the industry. While including him initially emerged as a joke, the justification participants ultimately made for his inclusion was that 'it was better to have him there so that we are able to consult him in the first round' –

and perhaps exert some influence on him. Notably, Demeter had only recently been awarded responsibility in the area of popular music, yet his perceived position in this sense appeared rock solid. However, except for the one reference to the Trianon Treaty-themed grant, he and his gatekeeping position were not criticised directly from an ideological control perspective, but rather as someone without specific music industry expertise. This seems to reiterate the preceding, pre-pandemic criticism of 'radio' and 'cultural policy' as removed from the world of the music industry and popular music.

Last, participants in the first pandemic-era drama (13 May 2020) expressed their frustration that the state does not provide them with a space to exist; does not 'let them live.' In one instance, this was posed as a question: the participants pondered whether cooperation – a desired goal – was missing entirely, or whether it was actively being broken down by the state. Grassroots organising, the group argued, would work fine if the state would only permit it – the 1980s' US college radio indie movement (see Kruse, 2003), another Western example, was cited by one participant as a parallel. In this sense, the conditions of autonomy were imagined as room for manoeuvre in economic terms, similar to what Hodkinson (2002) terms relative autonomy in the context of subcultural production, generated by the state either by 'taking less', or 'giving more' resources in a time of crisis.

## 5. Strategies of 'survival' and the three dimensions of integrity

In the following, we outline the enacted and embodied strategies that emerged in the post-pandemic drama events, which also inform us about career strategies and principles in the Hungarian music industries in general. The web of actors and dimensions within which participants outline such strategies inform us about their perceptions of power, autonomy, and dependency.

As mentioned in the previous section, in the first pandemic-era drama (13 May 2020), the group defined 'survival' after the crisis as the central situation to explore. A three-way model was generated, with the participants as part of the game, which can also be used as a model in the analysis. The group differentiated three dimensions of integrity – namely *moral*, *physical*, and *professional* – and outlined three potential strategies, plus a fourth sub-route, for finding a way out of the crisis as a music industry worker through possible combinations of these three dimensions. The first scenario was a straight, but arduous journey, requiring perseverance – expressions used by the participants included 'walking' the route. The walk was slow, and mere survival in the industry was the goal. The values attached to this were honesty and a 'straight backbone' – representing moral stature. In this scenario, all three dimensions of integrity were maintained, but moral and professional integrity were emphasised. The second scenario ended in leaving the industry – and music – altogether, which equalled the loss of professional integrity. A sub-scenario of this entailed the joint loss of physical integrity, with illness or depression and even death at the end, represented by a downward turning line. The third scenario involved the maintaining of professional and physical integrity, but without moral integrity. This was represented as an upward route completed with the help of 'clever solutions': making the best possible use of the pandemic situation by following individual interests and remaining on one's feet throughout. As opposed to the first route, this was drawn not as a straight line, but as a wavy, uneven route.

In terms of subjective evaluation, on the level of explicit, verbal expressions, this third route was condemned unequivocally: its representatives were constructed as enemies both within and outside of the game (i.e. when participants spoke on their own behalf, as opposed

to enacting a role). At the same time, ideas enacted as part of the third route (where 'moral integrity' was lacking) were pondered as 'viable ideas' previously and accepted as 'good' choices. These 'viable ideas' were aimed at 'gaining money' and 'a lot of fans in the long run.' When the participants in effect walked the winding third route, the enacted actions did not in fact seem extreme; rather, they were directed at making 'clever' use of the opportunities that presented themselves amidst the pandemic situation – including the interpretation of regulations in a 'flexible' manner. In some cases, the actions were characteristic of entrepreneurial behaviour, and can also be compared to creativity as resourcefulness in the sense of making use of the opportunities provided by the system as described by Mayer (2011). For instance, organising gigs in the form of 'garden parties' to circumvent restrictions in place, or accepting such a 'garden party' job if it were organised by 'friends'; successfully applying for an Artisjus grant with the help of a personal connection – a former classmate; asking for more money amidst decreasing fees in the wake of the economic crisis associated with the pandemic; making use of money they had previously 'taken out of' their company; working in a different field in parallel so that they remain on their feet – and gaining an advantage in the competition over others who were unable to similarly rely on other jobs; and selling personal property to make some money. Overall, these actions can be characterised as individualistic, lacking notions of solidarity with others also in trouble, and relying strongly on informal connections.

The separation of the market from the state – more precisely, the government and politics – was also an explicit element of the definition of moral integrity in the first pandemic-time drama. When discussing potential coping strategies for surviving the crisis, participants clearly drew a line between getting a job with a multinational corporation while remaining in the industry (for instance, a major record label or a live entertainment corporation), which was not problematic morally, and accepting a job with a 'National So-and-so' institution; the second reference is to the mushrooming of the aforementioned newly established institutions in cultural areas during the Orbán regime. This appears to reinforce the hypothesis that the threat of 'selling out' in a moral sense is articulated differently in this local context from the creativity-versus-commerce paradigm documented in accounts based in Western countries. As opposed to the logic of capital, it makes at least implicit reference to the threat of incorporation in the specific context of the 'System of National Cooperation', while leaving the capitalist logic of the industry uncontested.

Professional integrity was foregrounded in two senses, the first of which dominated in the pre-COVID drama events, while the second one emerged in the pandemic-time events only. Definitions of autonomy and dependency were a central concern in the first drama (11 December 2019), as predetermined by the researchers. Participants' definitions and associations predominantly revolved around the tension between the logic of profit and what they referred to as professional concerns, but what were in effect concerns regarding cultural taste and style. The participants primarily attributed such concerns to musicians on the basis that they are the ones whose work is directly creative, and thus exist in a cultural and aesthetic field, while it was up to managers or promoters – those working with musicians – to look out for the business interests of artists. One exception was a promoter who also mentioned that the question of taste was important: from his own perspective as an electronic music promoter, he expressed that he would deem his autonomy to be compromised if he were forced to 'book DJ BoBo.' In other words, the creativity-versus-commerce dilemma was recognised, but the non-musician workers at least partly – with the mentioned exception – relegated this dilemma to musicians, who were understood as *the* creative workers of the industry.

In the drama events during the pandemic, questions concerning taste and the audience were also present, this time mostly formulated from a 'demand' perspective: participants complained about the predominant 'mainstream' tastes and the lack of 'culture' and 'education' of the general public. Within the pondering about their own survival in the industry, the existence of a demand for 'interesting' music and music discovery, as opposed to going for the familiar, was regularly cited as a crucial factor. The participants thus positioned themselves as 'alternative' or catering to niche tastes, and identified a lack of musical culture and distinction in Hungarian society as a factor further curtailing their creative autonomy. It can be concluded that while there was an ostensible distancing from the creativity-versus-commerce dilemma during the pre-pandemic events on the part of non-musicians workers, creative autonomy in terms of alterity – as opposed to unrefined mainstream tastes – came to be emphasised during the time of the pandemic. This may be related to a crisis of their professional identity that the sudden stop created for workers, which may have led them to articulate their own creative identities – expressed through alterity and cultural capital – normally hidden in the background to the forefront.

At the online events, professional integrity was also foregrounded in emphasising music as a calling and as central to music industry workers' self-identity, which was very strongly felt amidst the crisis, when this basis – the possibility to maintain a career as a musician or industry worker – was being directly and seriously threatened for many. In the participants' accounts, it led to a questioning of who they were – as one participant phrased it, 'more than six months ago, we lost our calling, our profession, what makes us who we are.' This narrative was especially strongly present in the fourth online group (4 August 2020), which was held directly after the announcement on 30 July that the restrictions in place over summer were not to be lifted after 15 August, widely shattering the hopes of industry workers. The disappointment, frustration and depression felt in their close social and professional environments was clearly communicated by the group, and it was in this context that the threat to professional integrity, expressed most directly in the fear of the second route (having to leave the industry, and perhaps the world of music altogether), was at the forefront. The source of the expressed frustration, at the same time, was resentment directed towards the government, as the latter control restrictions, and 'the Hungarian state', which was, in this context as well, perceived as *the* force with agency. Notably, the reference to the government and the state was in many instances not made explicit; rather, participants seemed to speak to, or resent, an unclear power with control over their circumstances that rid them of their agency and their identities. Participants in the second online drama (16 June 2020) also spoke of their 'right to work' – introduced by one participant, but then also adopted by others over the course of the drama – which had been taken away by this power.

As the above indicates, professional integrity was closely linked to physical integrity – the maintaining of mental and physical health. Explicit references to depression and addiction in relation to the loss of work and identity were present in the first pandemic-era drama – at that stage attached to the imagined figure of the musician, and as the endpoint of one of the possible routes – as well as the fourth one: 'This has been really taxing for me in a psychological sense, I'm not somebody who is prone to depression, but I've been doing this for sixteen years and now I can't do it. And totally independent of the money, this affects me in a negative way, I feel as though I've lost part of my identity. And how does somebody who has been doing it for forty years [cope]?' he asked, referring to a particular senior sound technician, well-known and respected in the industry. 'With twenty beers a day', responds another participant. The danger of depression and other mental health problems, already significantly more prevalent

among musicians than in the general population (Gross & Musgrave, 2020; Hangfoglaló, 2020), combined with alcohol and other substance use, were thus closely tied to the crisis situation, and to the close entanglement of working in music and the self.

## 6. Conclusions

The reliance of the Hungarian music industries and their workers on live music, together with the inequality and vulnerability that the pandemic situation heightened, created a space for the post-2010 regime of capital accumulation (Éber et al., 2019) to extend its hegemony and incorporation of the cultural field through the acquisition of positions and resources in the popular music field – for instance, through the Warehouse Gigs programme – and to strengthen its ideological control. In the paper, we looked at how workers – musicians, promoters, managers, and technicians – locate themselves in the music industry in relation to its main actors, and its broader social, economic, and political context, and how this changed, if at all, with the pandemic. We asked how workers viewed the role of the state and the market in their work and the playing field in which they are situated, and whether and how the COVID-19 crisis and restrictions affected this. We also looked at what kinds of strategies of coping and surviving they thought existed in light of the crisis situation.

We looked at the perceived role of the state in particular, since this is largely missing from scholarly accounts of creative autonomy – a bias not unrelated to the dominance of studies from Western countries. Our first result was that the state and the government received not only more emphasis, but were also attributed more agency in the drama events conducted during the pandemic in relation to the two previous occasions. In the dramas, negative attitudes towards the state emphasised bureaucracy, the impersonality of power, and the state 'taking but not giving' at a time of crisis. The positive scenario, involving accepting what we identified as a welfare state model included a role for the state protecting the industry and its workers – but without imposing selective principles that would (further) divide the industry, and only to an extent that workers and institutions could function with the help of such provision of resources in a relatively autonomous and independent manner. Nevertheless, the groups had a liberal, free-market state in mind as an ideal model, with a 'healthy' economy, which tended to be associated with Western countries and their music industries. Through this, they appeared to be reproducing the 'moral geopolitics' of an unequal capitalist world system. The greater attention to the role of the state and the government during the pandemic could theoretically open up potential paths towards politicisation and collective organising. At the same time, there was a clear lack of perceived agency on the part of the workers, which may hinder this. Moreover, we also encountered an apparent lack of concern for the wellbeing of the audience or society in general – even a reluctance on the part of the groups to perceive themselves as part of a society – solidarity was only imagined *within* the industry.

The three-way model of integrity – moral, professional, and physical – that emerged from the drama as part of the process of devising and modelling strategies for coping and surviving proved to be a good analytical tool for the study of (changing) notions of autonomy and dependency. Morality assumed three dimensions in the drama: first, a 'clean', straight strategy requiring perseverance versus dubious, corrupt practices; second, acting in solidarity and following the rules of fair play as opposed to merely individual interests; and third, distancing from the government and political influence and power – but not from a profit logic or pursuit of capital – versus being compromised politically. With regard to professional integrity, elements related to cultural logics, most importantly, taste, came to the forefront even in the

case of non-musician industry workers, as working in music as the source of identity gained new emphasis with the pandemic. 'Professionality' – understood as knowledge of the popular music industry, and as cultural capital – was notably also articulated as a desired basis for actors representing the state, and current actors were criticised for not possessing this. In this crisis situation, viewing music as inseparable from the self became ever more closely tied to physical integrity – it was made evident by the participants that the loss of access to music making (directly or indirectly, whether as musicians, managers, technicians, or promoters) could easily lead to mental and physical problems, which are typically dealt with individually.

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