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BOOK REVIEWS

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Natural language processing: The integration of a new methodological paradigm into sociology

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Abstract

Natural language processing (NLP) methods are designed to automatically process and analyze large amounts of textual data. The integration of this new-generation toolbox into sociology faces many challenges. NLP was institutionalized outside of sociology, while the expertise of sociology has been based on its own methods of research. Another challenge is epistemological: it is related to the validity of digital data and the different viewpoints associated with predictive and causal approaches.

In our paper, we discuss the challenges and opportunities of the use of NLP in sociology, offer some potential solutions to the concerns and provide meaningful and diverse examples of its sociological application, most of which are related to research on Eastern European societies. The focus will be on the use of NLP in quantitative text analysis. Solutions are provided concerning how sociological knowledge can be incorporated into the new methods and how the new analytical tools can be evaluated against the principles of traditional quantitative methodology.

Keywords: natural language processing; text analytics; text mining; institutialization; epistemology; causality

1 Introduction

The analysis of written texts has always been part of social research methodology, although initially, the latter was strongly associated with qualitative research. Quantitative text analysis started in the first half of the twentieth century and typically involved analyzing the frequency of occurrences of qualitatively identified categories or 'codes' (e.g., Bales, 1950). Computational power supplemented human capacity from the 1960s onwards with the invention and development of computers (Hayes, 1960). Because of the appearance of (partly) automatized content analysis, the amount of processable text increased.

In parallel with technological development, the universe of digital textual data also started to grow at an enormous speed. According to recent International Data Corporation research (Reinsel et al., 2018), the volume of this data will reach about 175 Zettabytes

by 2025 (five times that of 2018). Approximately 80 percent of all data is estimated to be unstructured, text-rich data. The impact of the IT revolution is even more extensive since it has reshaped not only technologies but the whole of society. Every aspect of our lives is deeply affected by the digitalization of data. Almost every digital 'step' we take is recorded, from our mobile phone calls through text messages to posts on social media. A significant part of this data is textual – e.g., the metadata of tweets includes not only the message but the creation time, location, number of likes, and the followers of the user, etc. Thus, we are not only able to analyze the tweets but also explore users' networks, determine network roles, follow the spread of news in time and space, identify topics and opinions, and determine the factors influencing these phenomena.

Natural language processing uses computers to process and analyze large amounts of textual data. NLP is located at the intersection of computer science, artificial intelligence research and linguistics and involves employing computational methods for the purpose of analysing large amounts of text or producing human language content (Hirschberg & Manning, 2015). It also includes speech recognition and the syntactic processing of texts, but the social sciences are mainly concerned with semantic approaches to language resources. Therefore, this sub-field is also referred to using several other largely synonymous terms, such as computational linguistics, text mining, text analytics, etc. For example, Hirschberg and Manning (2015) use NLP and computational linguistics synonymously; however, in everyday use, NLP emphasizes a more empirical approach. Hereafter, we will use the term NLP throughout, as our impression is that this term is most canonized in sociological applications.

NLP primarily gained relevance during the digital revolution, which also involved a revolution in digital self-expression. While in the past, opinions and attitudes embodied in texts were almost exclusively the narratives of the cultural elite, today, the production of written (and often digital) text is no longer confined exclusively to the elite but includes everyday users. Social behaviour can be directly observed now, and not only on a self-reported basis, which supports the internal validity of sociological inquiry. In addition, the availability of digital data provides opportunities for both unbiased longitudinal and retrospective research, as behavioural data is archived, and there is a possibility for the live investigation of contemporary processes as well.

Large datasets overcome the sample-size limits of traditional analysis: small subpopulations, detailed analyses and rare phenomena can also be approached with these data and methods. Additionally, the widespread digitization of pre-existing textual archives makes it possible to investigate phenomena that existed before digital society, like historical events or cultural trends.

In parallel with the growing availability of analyzable textual data, the vast increase in computing power, the development of computer capacity, artificial intelligence, computational linguistics and more accurate machine learning algorithms are producing new tools with which these textual data can be analyzed. As these methodological tools are more and more advanced, such text analysis opportunities can provide suitable analytical depth, even fulfilling the expectation of sociologists. NLP, a whole new discipline, has emerged, allowing for the examination of corpora with billions of words, the automatization of coding (or 'annotation' – a term used by the programming community) of texts, and the discovery and processing of linguistic structures by computers. These algorithms

can unfold not only the explicit content of a corpus but also its latent meaning (e.g., sarcasm and metaphors) and topical associations (e.g., values and opinions). Computers can detect semantic structures and connotations within large corpora that humans alone would not have been able to identify. The application of algorithms has also standardized the annotation processes to a high degree, substantially raising the level of reliability of text analysis. NLP methods are rapidly advancing with the development of data science and computational linguistics; new methods emerge every week. At the same time, the contribution of researchers is still very important – artificial intelligence is not that intelligent, and researchers' knowledge and theoretical conceptualization are essential in the design and implementation of analyses (Evans & Aceves, 2016). These developments have opened up entirely new opportunities for researchers interested in text analysis.

Thus, NLP fits into the trend of the endogenous evolution of social research methods. Previous qualitative analyses of textual data in sociological research required line-by-line examination of texts, hence their application to large corpora was impossible. Machine learning techniques can extend the principles of qualitative analysis, representing a promising approach to researchers. As Figure 1 shows, the popularity of NLP has been continuously growing in recent years and within each discipline that is investigated.[1] Each trend line shows persistent growth even after normalization for the total number of publications in the discipline. The proportion within sociology has increased faster than average, which suggests that NLP is becoming an increasingly recognized approach in this field.

Multiple researchers have successfully applied the method in research on Eastern European societies. For example, Katona et al. (2021) and Barna and Knap (2022) conducted a thematic analysis of current online media: the former focused on the representation of corruption in Hungary, while the latter examined the discursive framing of Trianon and the Holocaust. Kmetty and Knap analyzed more than thirty million Hungarian Facebook comments to reveal the role of incivility (namely, indecent communication) as an emotional response to challenges and stress related to the COVID-19 pandemic. With the application of NLP, Bielik (2020) uncovered both the sentiment and the thematic focus of the social democratic parties of the Visegrad countries through their electoral manifestos. There is research using these methods even in the field of social history, like that of Szabó et al. (2021), who analysed temporal change in social discourses in the socialist era in Hungary using a large corpus from the journal Pártélet.

Our focus in this paper will be the use of NLP in quantitative text analysis, but it should be noted that NLP can also be successfully combined with qualitative content analysis. Such a mixed-methods analysis can respond to the depth/breadth dilemma often encountered with in-text analysis (Parks & Peters, 2022).

[1] To access publication data, we used Dimensions (https://dimensions.ai), a scholarly searchable database. We defined the search as applicable to the full text of any type of publication with the composite search terms "automated text" OR "natural language processing" OR "computer-assisted text" OR "computational linguistics" OR "text mining" OR "computational text" OR "topic model" OR "sentiment analysis" OR "text classification" OR "word embedding" OR "text clustering".

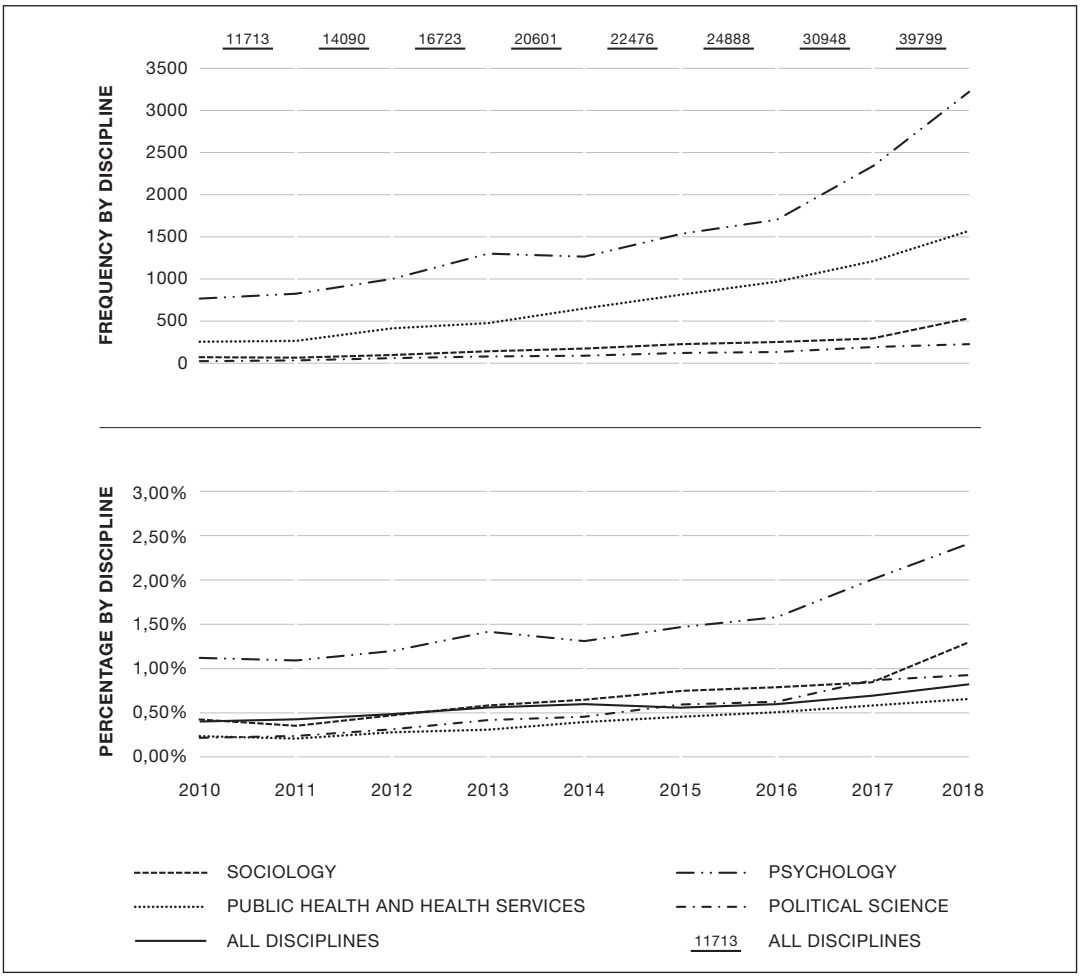

Fig. 1 Publications which use natural language processing in four disciplines (total number and percentages compared to the total number of publications in the field)

2 Analytical opportunities

NLP methods go far beyond traditional quantitative text analysis, which basically analyses the distribution of words or topics defined by the researcher. These new methods cannot and do not aim to substitute human reading and understanding but can extract specific pieces of information which help answer research questions. In simple terms, an NLP model uses a language model, which is a simplified representation of the text production process. It is designed to give an acceptable approximation of some parameters of the process that are important in the given context (e.g., the number of topics in the case of topic models; see later).

The new techniques and methods are, in some sense, just by-products of information science and business analytics; they were not developed to support social research. Therefore, it is an under-examined and still open question of which of the recently developed methods can be applied to sociological problems (some excellent examples are included in Evans & Aceves, 2016).

To illustrate the opportunities associated with these new methods, we briefly describe three of the most popular methods and describe exciting sociological research which applies them. All three methods (topic modelling, word embedding modelling, and supervised classification) have many different versions and different algorithms that can be implemented. For an easy-to-understand description of these methods and further examples of their sociological application, see Németh and Koltai (2021).

Topic modelling methods (Blei & Raftery, 2009) assume that a corpus is represented by latent topics that are probability distribution over words, thus treat a text as a mixture of some of these topics. Using topic models, Shah (2019) investigated the contextual framing of rape in the English language press in India before and after the 2012 gang rape case and detected important changes in the framings. Sterling et al. (2019) analyzed 3.8 million Twitter messages and revealed that, on this platform, liberals and conservatives differ significantly in their priorization of social values. Thus, these models help understand and classify the explicit content of large texts.

Another inspiring NLP model is the family of *word embedding models* (Mikolov et al., 2013), which geometrically represent the semantic structure of texts. These models position words in a high-dimensional vector space. The training of the vector space and the position of the words are based on the textual context of the words. Words with similar meanings are placed close to each other in this space. Jones et al. (2020), using millions of digitized books, quantified shifts in male gender bias over time in four domains: career, family, science, and arts. For example, they proved that gender bias still exists in science by measuring the distance between male and female word pairs (she/he, woman/men, etc.) and focused on their distance from scientific terms, such as technology and experiment.

Our last example of important NLP methods is the family of *supervised classification*. Supervised classification makes it possible to teach the result of a traditional qualitative text analysis of a small sub-corpus to an algorithm, which expands its classification to a much larger corpus. The method is a clear example of mixed methods: the result of human coding (a qualitative approach) is input into the quantitative algorithm. Florio et al. (2019) developed a supervised classification model for hate-speech detection on a corpus of Italian Twitter data. The researchers employed human coders to label (annotate) a smaller sample of their corpus and used it to teach the algorithm to automatize the labelling of a larger number of geo-tagged tweets over six years. They analysed this data together with macro-level social indicators and found correlations suggesting an association between economic and cultural factors and the presence of online hate speech. An application that applied a supervised classification to data from Eastern Europe is described in Csomor et al. (2021). In their study, they assessed the responsiveness of Hungarian local governments to requests for information by Roma and non-Roma clients, relying on a nationwide correspondence study. The authors showed that it is possible to detect discrimination in emails in an automated way without human coding.

As the above examples show, sociological knowledge and methodology can have high added value in the application of NLP tools and vice versa; these methods have strong interpretive power, and hence they have a great deal of potential in sociological knowledge building. Furthermore, recent advances in NLP methods based on artificial neural networks are developing rapidly, with outcomes such as increasingly powerful machine translation (Khan & Abubakar, 2020), chatbots capable of answering thematic questions (Tiwari et al., 2021) and humour detection (Miraj & Aono, 2021). These developments, which serve a practical purpose, will also certainly find their use in social sciences.

3 Challenges

3.1 Conceptual, disciplinary, and institutional tensions

The integration of NLP into sociology demands more than merely using new methods to address old research questions. As we show later, a clear shift can be observed in empirical expertise from academia to industry since industry generates problem-solving solutions and can also finance these developments. Previously, the role of sociology was based on its own expertise in data collection, analysis and theory creation (Savage & Burrows, 2007). However, nowadays, social and digital data are also collected and investigated by computer scientists. Social scientists, who earlier defined themselves according to specific methods of research, have had to realize that the emerging methods are not exclusive to social sciences but are being developed by experts in other fields (Savage & Burrows, 2007). The result is a loss of dominance and a need to redefine sociology's role in empirical social research.

Gaining competence in NLP as a social scientist is associated with a substantial entry cost. Sociologists have to enter a new field where language is constructed by programs, and the problems a researcher faces during data collection are not necessarily related to society or even to real people. According to Metzler et al. (2016), who conducted a worldwide survey with social scientists, approximately half of the respondents had done some kind of big data analysis, and one of the most significant barriers that was mentioned was the lack of time for learning methods in this new field. However, sociologists with strong quantitative knowledge were able to improve their skills to meet this challenge. The growing number of introductory books reflects this demand (an excellent example is Ignatow & Mihalcea, 2017). Concurrently, computer science, physics, and computational linguistics experts who have much more experience in this field have discovered that their knowledge makes them capable of researching society and have not been afraid to use it. The symbolic territorial games and the above-mentioned tensions have created further difficulties concerning the institutionalization of computational social science.

Though the tension between social sciences and the above-mentioned data science fields is decreasing, different intellectual traditions and solutions are still present in the two fields (DiMaggio, 2015). Quan-Haase and McCay-Peet (2017) discuss these challenges and difficulties, as well as the advantages of creating interdisciplinary teams. Motivations and rewards for scientists of different disciplines can vary: data- and computer scientists

favour rapid publication and more application-oriented results. On the other hand, social scientists prefer publishing in conventional journals (with a slower publishing process) with no need for applied results.[2]

Nevertheless, it is worth addressing these difficulties and identifying goals that can satisfy the researchers of both disciplines. Automated research of society needs both approaches: the technical knowledge of computer- and data scientists and the social theoretical knowledge of sociologists are complementary. These collaborations can be highly successful and result in frequently cited papers (e.g., Tinati et al., 2014; Mohr et al., 2013; McFarland et al., 2013). Institutions like Harvard have realized the need to restructure their social sciences departments and promote collaboration with other fields (King 2014). Industry and academia can also be merged in such projects, such as Social Science One. This Harvard-incubated initiative enables academics to use the increasingly rich data of companies to address societal questions. In recent years, a process of consciously organized institutionalization has been observable. Several research centres and academic departments have been established (e.g. the Center for Research on Computation and Society at Harvard and the Institute for Data, Systems and Society at MIT), BSc and MSc programs on computational social science have been launched, and numerous fellowships and summer schools (e.g. the Summer Institutes in Computational Social Science in thirty renowned locations around the world) provide training in the field of computational social science and specifically in NLP. International publishers increasingly focus on the intersection of social and computational science. Book series on computational social science have emerged; newsletters and social research are being published. New journals have been established (e.g. Springer's Journal of Computational Social Science in 2018 and the Journal of Digital Social Research at Sweden's Umeå University), and conference series have been started (e.g. the International Conference on Computational Social Science, Big Data Meets Survey Science, etc.).

However, most of the initiatives described above come from data- and computer science and are less likely to be facilitated by social scientists, especially sociologists. Indeed, until recent years, sociology has made only minor contributions to such research. At the same time, researchers who analyze social digital data have made few attempts to engage with the social science literature (Mützel, 2015; Watts, 2013). In 2016, in a paper entitled 'Theoretical Foundations for Digital Text Analysis', Gabe Ignatow discussed the lack of stable institutionalization of digital text analysis in the social sciences. The question is how to expand this interdisciplinary approach to the traditional institutions of sociology. For example, although some departments (mainly at graduate schools) teach methods of computational social science, these new techniques are still not part of general sociological curricula. According to Jager et al. (2020), programs in computational social science are still quite rare in Europe, both at the bachelor's and master's levels. The latter detects two main reasons for this lack of training: students' mathematics-related anxiety and the

[2] Results from the database of Microsoft Academic Research tend to support these conclusions. Most of the results for the search term 'natural language processing' are from conference papers; while the main type of publication for 'social network' is journal publication; going forward to a more classical social topic, 'feminist theory', the ratio of conference papers compared to all publications in this topic is even fewer.

limited knowledge of academic instructors. The latter claim is consistent with the finding of Metzler et al. (2016) that this knowledge is not evidently available among social scientists, and significant time will be needed to build it. The main question is how can education provide an appropriate knowledge of social theory as well as specific computational skills that students can apply (Boyd & Crawford, 2012).

3.2 Do 'numbers speak for themselves'? Measurement and data quality

3.2.1 Objectivity

The claim that 'numbers speak for themselves' comes from a widely cited and widely criticized pamphlet written by Chris Anderson, former editor-in-chief of Wired magazine (2008). Anderson introduced a new paradigm of empiricism that assumes that the vast volume of data offers objectivity and precision, suggesting that scientific hypotheses and modelling are not needed anymore. Many different disciplines were represented in the responses provoked by the article, including biology (Pigliucci, 2009), biochemistry (White, 2009), and, with some delay, social science (a well-known response was provided by boyd & Crawford, 2012, and a more recent one by Resnyansky, 2019).

The question of objectivity also arises in the field of NLP. The challenge is epistemological in nature: digital data – compared to survey data – are not the product of traditional operationalization processes but are like 'digital footprints'. Researchers cannot plan the concrete measurement of their concepts but 'have to cook using what they find'. For example, let us take the Hedonometer, a Twitter-based text analysis tool that measures the happiness of large populations in near real-time (hedonometer.org) by the University of Vermont, Complex Systems Center). A traditional survey with a similar aim would be based on responses from a representative sample (e.g. to the question 'How happy do you feel on a scale of 1 to 4?'). The Hedonometer measures the happiness of regions/time intervals based on the *average happiness* of the respective tweets (subjective decision 1). The happiness of tweets is based on *average happiness scores* assigned to the words in the tweet (subjective decision 2). In this language model, tweets are not analyzed syntactically, but their words *as a set* are considered, which is called the bag-of-words model (Németh & Koltai, 2021) (subjective decision 3). To quantify the happiness of words, Amazon's Mechanical Turk service (that is, combined *human decisions,* were used). For example, words like 'hope', 'hero', and 'to win' score highly (subjective decision 4). The procedure is an example of lexicon-based sentiment analysis. It is clear from the example that digital footprints do not have meaning in themselves; it is researchers who construct meaning.

3.2.2 Context

The role of context is another concern that is often raised (Shaw, 2015; Lewis, 2015; Törnberg & Törnberg, 2018). Context is a specific phenomenon that is hard to capture on a large scale. In the case of the Hedonometer, the question of context trivially emerges: the happiness of words is measured without taking their context (= the tweet they are mentioned in) into account, and the happiness of tweets is also measured without assessment of their

context. However, messages are culturally embedded and are affected by social norms, which can vary in different societies. Some of the Hedonometer's results (e.g., older bloggers are less happy, and the happiness of music lyrics decreases over time) might be traced back to these factors and do not indicate real shifts in well-being.

3.2.3 Internal and external validity

Basic methods for evaluating the quality of surveys – e.g., assessments of external and internal validity – can also be easily implemented in this field (for a complete adaption of total survey error to Big Data, see Amaya et al., 2020). Turning back to the Hedonometer: do American Twitter users represent the whole American population? Is the random sample of tweets provided by the Twitter API representative of the whole Twitter stream? Such questions are all related to the classical aspects of the quality of measurement. Regarding external validity, intuition and scientific research suggest that widely used social media data cannot be treated as a representative sample of the general population (Blank & Lutz, 2017). As for internal validity, traditional quantitative social research works with numerical data supplied by survey respondents and is subject to potential measurement errors like recall bias or social desirability bias. Computational methods, however, are often applied to 'found texts' that were usually created for some other purpose than scientific analysis. Thus, these data often refer not to self-reported but observed behaviour, hence are free from recall bias and social desirability bias. These data have higher internal validity in this sense than classic survey data. However, during the analysis, texts are translated into numbers (see earlier for how the Hedonometer defines and measures happiness), and the translation process includes many decision points, which – as with any quantitative research – have to be handled by the researcher.

We conclude that in the case of NLP, there is some distance between results and 'reality' that decreases internal validity, just like in the case of traditional survey research. The consequence is also similar: this distance does not invalidate 'translated texts' but highlights the importance of understanding our data that are 'social' in origin. Including conceptual frameworks and social theories and integrating social scientific knowledge into computational analytics could support this understanding. With detailed documentation of proper methodology and conscious interpretation that deals with representation error, measurement error, and context, reports like Hedonometer's can also give compelling insights into society.

4 'Change the instruments, and you will change the entire social theory that goes with them' – A new methodological paradigm?

4.1 Prediction vs. causation

A search for Latour's quote (2010) in the title, together with the expression 'big data', generates hundreds of Google hits. Indeed, digital data reframe the measurement process (as discussed in the previous chapter) and the logic of scientific research. Because of its industrial origin, analytical methods associated with the new paradigm are optimized for

prediction, while explanation and causation – the focus of sociology – tend to be outside its scope. The discourse that frames this change as a paradigmatic one (creating a tension between 'new' and 'old') may make it more difficult for automated data analytics to be integrated into sociology.

Consider the paper of Tsakalidis et al. (2015), who predicted election results using Twitter data and polls. The authors defined different machine learning models and, based on some measures, selected the best one. They implemented this selection process without interpreting the model and identifying the factors most likely to influence the election result – as would routinely have been done in traditional sociology.

In general, a specific feature of computational text analysis inherited from data science is that it aims to optimize predictions, as opposed to traditional social research, which tries to define causal models. This difference is crucial. The former concentrates on the outcome (e.g., classification), looking for the optimal function of the predictors while trying to avoid over-fitting. The latter is interested in the effect of a given predictor (a social determinant) adjusted to potential confounders. Predictive models are not interested in interpretable effects (e.g., they often transform or re-categorize predictors if this increases model fit, even if this results in noninterpretable effects). On the contrary, for traditional social scientists, proper operationalization and interpretation of the effects of predictors are very important, and predictive power is less so. A good example of such non-interpretable effects is the Netflix Grand Prize winner model. In this contest, the goal was to predict the evaluation of movies. In the winning model, one of the main explanatory variables was 'if there is a number in the title of the movie' (Töscher et al., 2009). NLP applications selected the best-performing predictive models based on their predictive accuracy: the focus was on the model's performance, and how the model worked did not matter. From the traditional causal point of view, these models are like black boxes.

4.2 Two cultures of statistical modelling

The prediction vs. causation contrast yields a significant dichotomy from the perspective of the philosophy of science and has statistical relevance as well. However, it fits more generally with the contrast that is identified between data-driven vs theory-driven approaches. Indeed, the essence of the dispute sparked by Anderson (2008) can be captured as a conflict between new data-driven and explorative approaches and traditional, theory-driven, model-based ones. There have been two decades of reflection on the statistical elements involved in this contrast, provoked by a paper by Leo Breiman (2001). Breiman writes about 'two cultures' of statistical modelling. The traditional approach assumes the presence of a stochastic model for the data generation process: i.e., how are the data distributed, and how does the outcome relate to the predictors? The model is validated by residuals and goodness-of-fit statistics, while the model parameters are interpreted to answer the research questions. Algorithmic modelling, on the contrary, assumes nothing about the data and is not engineered to create an interpretable model. It just creates a 'black box' model and evaluates its performance according to its accuracy – namely, its fit

to the data. This dichotomy anecdotally provoked the British statistician Brian D. Ripley to state that 'machine learning is statistics minus any checking of models and assumptions'.[3]

Additionally, data science uses optimization procedures to choose from many machine learning models to select the best one according to its predictive power. Since a vast number of predictors are available in most cases, variable selection methods are used to overcome the effect of noise and obtain relatively few variables relevant to the predictive task. In contrast, traditional social researchers only define one model, but they describe it in a theory-based way. The selection of predictors is also based on theory. In doing this, both approaches aim to create a robust model that works not just in the given context or with specific data but also in other cases. Therefore, integrating sociological knowledge into each step of the automated text NLP analysis process may increase the robustness of the results.

4.3 Reconciling the two seemingly conflicting approaches

The above-described features of machine learning algorithms are understandable, considering the large amount of data they use, the many parameters they estimate, and the complexity of the nonlinear functions and interactions, which are all part of the outcome prediction process. Breiman's point is that data scientists' modelling approach should be added to the standard statistical toolbox as an option. Indeed, the contrast between the two approaches is neither antagonistic nor paradigmatic. Predictive and causal approaches are not substitutes: they can help answer different research questions and even supplement each other. In biomedical sciences, predictive (etiologic) and causal (diagnostic) approaches have long co-existed. Their relationship is well-articulated and is even part of the standard training curriculum (e.g., the widely used university literature by Kleinbaum et al., 2008). The interpretation of predictive models helps us open up the black box. For example, finding the most important predictors (in NLP terms, the 'features') of logistical regression and interpreting their coefficients brings us closer to understanding the measured social phenomenon. Cheng et al.'s (2015) paper provides an excellent application of NLP where prediction is applied in addition to an explanation in a study of antisocial behaviour in online discussion communities. Lately, data scientists have also tried to open the 'black box', arguing that even the developers of these algorithms should not 'trust the model' and ignore why it made certain decisions (Molnar, 2019).

4.4 Causal analysis in NLP

Extracting causal relations from data, specifically textual data, has also received attention recently (Feder et al., 2022). The dichotomy between theory-driven and data-driven approaches mentioned above can be seen here in the fact that a causal analysis is based on

[3] One of the fortune cookies in R (package 'fortunes', fortune 50) includes this quote: 'To paraphrase provocatively, "machine learning is statistics minus any checking of models and assumptions" – Brian D. Ripley (about the difference between machine learning and statistics) useR! 2004, Vienna (May 2004).'

domain knowledge, while an analysis that seeks to identify correlations requires only data. As one big-data bestseller (Mayer-Schönberger & Cukier, 2013) summarizes: correlation analysis is quicker and cheaper than causal methods. Moreover, the causal relationship does not deepen our understanding of the world. These sentences may remind traditionally trained sociologists of the threat of identifying spurious (only seemingly existing) correlations. Indeed, spurious correlation is one of those methodological pitfalls that is listed when speaking about the analytical features of digital data (see Gandomi's and Haider's prolifically cited paper from 2015). Spurious correlation may also be present in an NLP analysis. For example, we can detect it in the results of the Hedonometer that older bloggers are less happy, or the happiness of music lyrics decreases over time. A potential confounder is language usage, which changes by age group and period. Sociologists interested in causal explanations routinely try to operationalize and adjust for potential confounders. However, analysts often do not have access to such background variables, including demographic variables, when they use digital data. A perspective solution is to extract this background information from the text by identifying document covariates (e.g., masculine or feminine style).

Beyond the 'control variable' approach, other causal approaches may be applied in the field of NLP. For example, follow-up studies yield stronger causal evidence than repeated cross-sectional ones. However, their sociological analogues – panel studies – are expensive and burdened by the dropout rate (panel attrition). Digital data include the needed temporal dimension, making them more available for causal analyses. For example, Barberá et al. (2014) employed Granger causality (a temporal causal framework for determining whether one time series is useful in forecasting another) to analyze whether members of Congress are more likely to lead or follow their constituents on political issues. The authors analyzed Twitter messages of legislators and the public during the 113th US Congress. Hedonometer data could be used in a similar way to investigate the relationship between spatial aggregates (e.g. unemployment) and the happiness levels of people living in the same area. However, note that only aggregate data can be analyzed based on the Hedonometer, as we cannot link Twitter data with unemployment data at the individual level. In contrast, the following paragraph provides an example of extracting causal relationships at the individual level using the Hedonometer.

In a randomized controlled experiment, the gold standard of causality can also be applied in an online context. One example is the famous large-scale Facebook experiment (Kramer et al., 2014), where authors found causal evidence for emotional contagion. Another example is described in Walther et al. (2008), who examined observers' impressions of profile owners by manipulating what other users post on their profiles. Using the Hedonometer also represents an opportunity to experiment, and the easiest way to do this is by natural experiment when experimental and control conditions are determined by nature or by other factors outside the control of the investigators. For example, a fascinating question is whether environment or culture has a greater influence on happiness. Following Twitter users for a longer period could help identify whether the country of birth or country of later move is a more important determinant of happiness, whether moving later in life plays a lesser role, and how long one has to live in a new country for its effects on happiness to be felt.

5 Incorporating traditional quantitative methodology into the field of automated text analysis

Traditional quantitative sociological methodology could also enrich NLP research. Earlier, we wrote about including explanations (and causality) in research goals. In contrast to DiMaggio (2015, p. 4), who states that '[e]ngagement with computational text analysis [...] requires social scientists to relax some of our own disciplinary biases, such as our preoccupation with causality', we believe that descriptions and predictive models alone are not sufficient to satisfy the interest of social scientists, thus the latter should make efforts to create explanatory models with causal assumptions. (For methodological solutions that achieve this aim, see our earlier recommendations.)

A paradigmatic methodological feature of quantitative social science is its deep-rooted connection with statistics. Applied statistics and social sciences evolved closely and in parallel, whereby the latter promoted the development of new statistical models for addressing substantive sociological questions (see, e.g., the successive generations of intergenerational social mobility research [Ganzeboom et al., 1991]). Sociologists and data scientists know about different facets of statistics, thus, their cooperation could be inspiring. Additionally, quantitative sociologists are trained in a broader context of social data analysis to discover domain-related knowledge. For example (as mentioned earlier), the century-long sociological reflection on representation and measurement errors can be directly implemented into computational social science. A further example is the group of classic multivariate methods that are frequently used in sociology. Their straightforward geometric interpretation (such as through the different variants of cluster analysis, principal component analysis, factor analysis, and multidimensional scaling) may provide new insight into the study of NLP methods such as word embedding vector spaces.

6 Summary

The digitalization of society and new methods of social research are together creating fundamental changes in science. In this paper, we gave an overview of the social scientific context of NLP, review the main opportunities associated with this, and discuss the challenges of integrating the new generational toolbox into sociology.

One of the challenges is epistemological in nature: digital data are not products of a traditional operationalization process but are like 'digital footprints', which raises questions related to their objectivity and validity. More generally, the challenge of the new data and methods can be formulated as a new research paradigm: new analytical methods are optimized for prediction, while explanation and causation – which are the focus of sociology – are somewhat outside their scope. The new, data-driven approach often approximates causality with simple correlation.

Our point is that the contrast between the old and the new approaches is neither antagonistic nor paradigmatic. On the contrary, predictive and causal approaches can give answers to different research questions, and the approaches may be complementary.

Based on our earlier argument, integrating sociological knowledge into NLP enhances our understanding and makes it possible to broaden sociological knowledge by discovering new insights. Numbers do not speak for themselves, whatever complex analytical methods we use. It is the researcher who makes the calls 'behind' the numbers when making decisions at each step of the analysis and when interpreting the results. The depth and reliability of new insights depend on the domain-specific knowledge applied throughout the whole analytical process. Sociological expertise is required to formulate a research question, select the proper corpora, understand its formation and context, select and specify data preparation and pre-processing procedures, evaluate model validity, interpret the results, and position the interpretation in the scientific discourse. Without a theoretical framework, our model may not contribute to understanding the problem being investigated. As the above-mentioned case of the Netflix Prize also shows, solely searching for patterns is no more than 'data fishing', which is of only slight relevance in sociology and data science. However, NLP analyses which attempt to interpret models and adapt methods that provide stronger causal evidence can lead to correct results and more effective ways to build sociological knowledge.

Turning to the institutional context, several research projects that used digital social data have been implemented by data scientists rather than sociologists. However, the discovery of new knowledge regarding society also needs sociological knowledge, which makes dialogue between the two disciplines necessary. The hope is that these methods and perspectives will be organically integrated into sociology, which requires much more than 'picking up' some new methods. New institutional conditions are needed that are built on a conscious process of institutional renewal (e.g., aimed at making the different interests of disciplines compatible). Quantitative sociology is undergoing a transformation from the work of single researchers who write the questionnaires and analyze the data alone to interdisciplinary collaborations. The new skills that are needed to analyze digital textual data should be added to the quantitative sociological curriculum in parallel with the expansion of pre-existing courses that cover issues related to digital data. If computational methods are more widely known and taught, sociology in general can take a huge step forward.

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Capturing populist elements in mediated discourse: The case of the 2020 Slovak parliamentary election

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Abstract

The article measures the degree of populist elements present in party leaders' discourses delivered as a part of their appearances in TV debates during the run up to the 2020 Slovak parliamentary elections. With the use of the 'holistic grading' approach, we empirically capture the presence and prominence of populist elements in textual transcripts of speeches delivered by four opposition party leaders. We start by defining populism as a discourse which can express a set of unique ideas and then follow up with arguments for the use of party leaders' communication as the object of analysis. We then proceed to operationalize the exact coding process of the 'holistic grading' method which is used in our analysis. The measurement results quantitatively represent the degree of populist elements in the communication delivered during the electoral campaign. We note that the 'holistic grading' method was successfully able to capture populist elements in the performances of actors who have been previously labelled populist. We find consistent use of populist discourse in the performances of Boris Kollár, Igor Matovič, and Marián Kotleba, with the latter two producing several extremely populist performances. We then discuss our results and further implications derived from the collected data.

Keywords: populism; discourse; Slovakia; elections

1 Introduction

This article addresses the increasing expansion of the 'populist wave' by analysing the recent situation in a specific country – The Slovak Republic. Its primary purpose is to provide a descriptive analysis of the level of populism present in debate performances of Slovak party leaders. In doing so, we hope to contribute to the larger discussion in academia about who deserves to be described as populist and what should constitute the prerequisite of such a conceptual label. Acknowledging that political communication can be analysed to empirically capture populist appeals, we have decided to measure the presence and prominence of populist elements in the discourse of four Slovak party leaders, de-

livered during their performances in TV debates in the period leading up to the 2020 parliamentary elections. We have done so also to test the applicability of a specific method for analysing populist discourse – the quantitative holistic grading – in the context of the Slovak political environment. Our main contribution to the ongoing research on populism thus lies mainly in providing empirical data about populist discourse at the party leadership level, where most of the decision-making power gets concentrated after a party wins the elections and forms a government. Finally, we have also attempted to verify whether actors described as populist by scholars do actually demonstrate populist elements in their discourse, and thus contribute to the larger debate on *why* or under which circumstances someone should be labelled as populist (Kocijan, 2015).

The article starts by conceptualizing populism as a specific type of discourse which can be employed by political actors to express a particular set of ideas: *Manichean understanding of politics*, *people-centredness* and *anti-elitism*. After that, we briefly address the Slovak context and justify our selection of actors and the format of the selected corpus by making a case for the analysis of discourse delivered during non-scripted public debates on TV. We then introduce the basics of the holistic grading approach developed by Kirk Hawkins which has already been employed as a methodological tool in cross-regional comparison of political manifestos and speeches (Hawkins et al., 2018). In the next part, we introduce the holistic grading process in detail with its operationalized coding dimensions. After that, we present our results and address positive cases. A brief discussion is followed by concluding remarks. Overall, the data gathered for this study indicate that Hawkins' (2009) method has been able to successfully capture populist elements in the discourse of Slovak party leaders, specifically in the debate performances from Igor Matovič, Boris Kollár and Marián Kotleba.

2 Populism as discourse

The concept of populism has received significant academic coverage in the last two decades (Taggart, 2002; Mudde, 2007; Hawkins, 2010; Müller, 2017). While there have been numerous different approaches to studying this rather ambiguous phenomenon, three distinct research traditions are generally identified at the core of modern populism studies: populism as a political ideology, populism as a strategy and populism as a discourse (Bonikowski & Gidron, 2016). Whether they understand it as a grouping of interconnected ideas about the nature of politics (Mudde, 2004), a top-down political mobilisation strategy (Weyland, 2001) or a specific political-rhetoric style (Panizza, 2005), these definitions generally agree that the concept of populism revolves around two core elements: glorification of the good willed, homogenous people and criticism towards the corrupt, self-serving elite. In the populist narrative, these groups are presented as being in an antagonistic relationship. The dualistic people-elite dichotomy framed through actors' political discourse is fundamental to populism (Laclau, 2005).

The emerging academic research on populism has contributed to a general consensus that populism should be best understood as a set of *ideas* which are being articulated through the discourse of political actors (Deegan-Krause & Haughton, 2009; Kocijan, 2015; Hawkins & Kaltwasser, 2017). Therefore, it is now widely accepted among scholars that

populist ideas (elements) manifest themselves in the discursive patterns of political actors (Laclau, 2005; Stavrakakis, 2017; Hawkins et al., 2018). Distancing ourselves from making binary assessments – an actor is populist or not – we follow the logic that individual performances and texts can be more or less populist, measured by the presence and prominence of populist appeals that they contain.

One of the dominant approaches to conceptualising populism is known as the *ideational approach*, which understands populism as a specific type of political discourse used to express a unique set of ideas; one that politics should be viewed as a Manichean (dualistic) struggle between a reified 'will of the people' and a conspiring, 'evil elite' (Hawkins, 2009; 2010). Under the ideational definition, populism as discourse should demonstrate three core features: a) Manichean and often moral understanding of politics; b) the proclamation of 'the people' as a homogenous and virtuous community; and c) the depiction of 'the elite' or 'the establishment' as a corrupt and self-serving entity (Hawkins et al., 2018). The approach to populism as a specific type of discourse has already yielded advanced research in the field, mainly in cross-regional studies through textual analysis, survey research and experiments (Kocijan, 2015; Grbeša & Šalaj, 2018; Jenne et al., 2021). One of Hawkins' (2009; 2010) most significant contributions has been the development of a complex coding rubric for the measurement of various levels of populism through a textual analysis, which he has applied to Latin American cases, mainly by analysing party manifestos and speeches. As we decided to employ this coding rubric in our analysis, we discuss the methodology of this measurement framework in a separate methods section, after briefly addressing the Slovak context and our decision to focus on televised debates.

3 The context of the 2020 Slovak elections

As a region where populism has significantly marked political culture and shaped political frontiers, Slovakia serves as an ideal case study for analysing populist communication. Spáč (2012, p. 1) notes that for several political actors in this region, 'populism became a primary or a secondary weapon in their struggle to gain public support, though with varying degrees of success.'

The result of the 2020 elections, in which we have witnessed the fall of a long-term hegemon with the emergence of electorally successful anti-establishment challengers, brought about a resurgent academic interest in populism and its manifestations in Slovakia and the region (Rossi, 2020; Scheiring, 2021). As around half of the Slovak electorate voted for a party which has been labelled populist, the 2020 elections resulted in a significant turn, with the overall electoral victory for parties branded as populist and also, a clear parliamentary majority for such forces (Havlík et al., 2020, p. 228). The 'demand side' of such change – shifting attitudes and preferences among Slovak voters – has been a subject of several articles that analyse survey and poll data in order to explain electoral volatility and the anti-establishment mobilisation which led to the success of populist parties in the 2020 elections (Gyárfášová, 2018; Gyárfášová & Linek, 2020; Gyárfášová & Učen, 2020; Lysek et al., 2020).

The 'supply side' has been mostly filled out by works that analyse individual populist parties in terms of the antagonistic narratives that they produce (Walter, 2019; Školkay

& Žúborová, 2019; Kazharski, 2019). We wish to add to this group of works and to comparatively address the differences and similarities between the various types of populist manifestations in Slovak politics, i.e. how populist narratives constructed by one actor differ from those produced by others. Thus, we propose a systematic, empirical analysis of the discourse produced by several competing Slovak populist actors during a single electoral campaign, which would contribute to our understanding of the role that this phenomenon played in the 2020 elections. With the party landscape in the legislative body dynamically shifting with almost each parliamentary election in Slovakia (Havlík et al., 2020), we find it important to fill out this gap by focusing on actors that have mostly gained political momentum during the last decade. While three of our four analysed actors took part in the formation of the government after the 2020 elections, none of them has been active in Slovak politics before 2010.

Our analysis should provide a more detailed snapshot of the populist practice in Slovakia. The latest global populism dataset that employs Hawkins' coding method on speeches delivered by political leaders all around the world covers Slovak prime ministers 'only' up to the period of 2018 and focuses explicitly on official public speech acts delivered during their incumbency (Hawkins et al., 2019). While we employ the same coding rubric, our article departs from such large-N, cross-border comparison by focusing on the within-polity dimension, i.e. the differences between various populist manifestations at the level of a single country. Such narrowed-down focus offers a more fine-grained analysis of concrete narratives and speech acts produced by Slovak politicians during a specific time-frame. A single-country study with a relatively small-N sample of analysed politicians allows us to comment on possible nuances of populist narratives produced in this region. Rather than attempting to arrive at findings that could be considered applicable beyond our case, this article aims to provide insight regarding the populist messages produced by Slovak politicians in recent years and also to test the use of the holistic grading approach on a rather unorthodox data corpus – the transcripts of mediated political debates broadcast during the electoral campaign period. While we are aware that our offering could be characterized as 'mere description', we concur with Gerring (2012) that description is an intrinsically valuable aspect of scientific research. Our work then simply offers a 'generalizing descriptive inference' (Gerring, 2012) that follows an indicator of populist speech and proposes an answer about the extent and manner of populist discourse present in several politicians' pre-election debate performances.

4 Case for debates

Shifting away from the dominant paradigm in current empirical research on populism, we have decided to apply Hawkins' (2009) methodological tool on a format, on which, according to our knowledge, it has not been applied yet. Rather than using manifestos or speeches as data units, which present a common choice for content analysis of populist discourse in the academic work on this topic (Deegan-Krause & Haughton, 2009; Akkerman & Rooduijn, 2016; Di Cocco & Monechi, 2021), our article analyses public political debates.

In a political environment where parties are heavily personalised, the analysis of party leaders' performances in political debates may provide a more valuable insight into

the main programmatic aspects and party position on particular issues. Especially in the case of parties branded as populist, Heinisch notes that 'it is the leader who determines the political direction, which in turn may deviate substantially from the written programme or from decisions taken by relevant party committees' (Heinisch, 2003, p. 94). Statements delivered during political debates can be considered far more spontaneous and less guarded than they would be in an officially prepared discourse. Under these circumstances, it can be assumed that these performances will reflect the 'fundamentals of politicians' discourse' (Grbeša & Šalaj, 2018).

We have decided to analyse the performances of four actors, all of them members of the opposition before the elections, with three of them being labelled as populist, or being members of parties, which have been denoted as populist in the present scientific discourse.[1] The fourth, non-populist actor has been included in the sample as a litmus test of the validity of the grading method, as we expect his scores to be relatively low compared to actors denoted as populist by scholars. Only actors who consistently took part in the election debates during the campaign period have been considered. As a result, Slovak party leaders who met the criteria for selection were the later short-time prime minister Igor Matovič (Ordinary People and Independent Personalities), the current speaker of the parliament Boris Kollár (We Are Family), their coalition partner Richard Sulík (Freedom and Solidarity), and finally, the leader of the then second largest opposition party in terms of allocated seats, Marián Kotleba (People's Party Our Slovakia).

The question which we are able to answer is whether, and to what degree do political actors, who are generally labelled as populist, employ populist discourse in their performances in pre-election TV debates. Our research question can therefore be structured as: To what degree have Slovak party leaders previously labelled as populist, demonstrated elements of populist discourse defined by the ideational approach in their performances on mediated debates during the period of 2019/2020 electoral campaign?

The contribution of our research thus mainly lies in providing empirical insight regarding the presence and prominence of populist elements in the discourse of Slovak political actors which took part in the 2020 Slovak parliamentary elections, allowing us to make evidence-based claims regarding the denomination of these actors as populist.

5 Methodological and conceptual framework

Having established why we decided to employ Hawkins' (2009) methodological approach for the measurement of populist discourse in the television debates, in the next two sections we turn to methodological considerations. The analysed corpus consists of transcripts of political debates, excluding the words of the TV presenters, coding only answers/statements of the analysed actor. The presence of investigated components is traced on the level of a whole performance that is treated as a single unit of measurement. Our methodology follows Hawkins' (2009) data-driven discourse analysis with decimal grading, which he has developed during his measurement of Latin American populist politicians.

[1] Populism and Political Parties Expert Survey 2018 (Meijers & Zaslove, 2018).

When it comes to the coding process of a politicians' discourse, one of us coded all selected transcribed TV debates and then, to verify the reliability of the coding process, we trained a second coder to go through the identical textual corpus and also apply the same coding rubric originally designed by Hawkins (2009). Coders were not able to see each other's results until the end of the coding process. Both coders also provided an overall comment for each performance, in which they justify the allocation of grades.

The development of the coding rubric has been based on the principle of holistic quantitative approach to evaluating textual sources, which 'works by assessing the overall qualities of text and then assessing a single grade without any intervening calculations' (Hawkins, 2009, p. 1049). The rubric itself revolves around three core elements of populist discourse laid down in the ideational approach to studying populism: the cosmology of *Manichean vision*; and two important ontological premises: the association of positive attributes with the good, common *people*, and the demonization of conspiring, *evil elite*. These are the dimensions of populist discourse coders should attempt to identify in the communication of political actors when using the rubric developed by Hawkins (2009).

The first core dimension, *Manichean vision,* refers to the dualistic, 'black and white' way of perceiving politics that is commonly present in the populist discourse. Populist actors will claim that there are only two sides to each coin – you are either with them or against them, with no middle ground being acceptable. Both 'good' and 'evil' camps of the dualistic struggle have a particular identity – the people are good, whereas the elites are bad and corrupt. Additionally, this can lead to the use of strongly moralised, often emotionally charged, and aggressive language that is common for populist discourse, with most political issues reduced to moral terms of good and evil. For example, Hugo Chávez referred to the election as a contest between the forces of good and evil, and claimed that the opposition represents 'the Devil himself', while the forces allied with the Bolivarian cause were identified with Christ (Hawkins, 2009, p. 1043).

The *populist notion of the people* is probably the most characteristic attribute of the populist discourse. As a part of the dualistic ontology, the good always has a particular identity – the will of the people. The mass of citizens is presented as being a homogenous, rightful sovereign with a unified collective interest, and the government has to be constructed in such a way that it will embody this unified will (Hawkins, 2010). The people can often be identified with the nation, which is common for right-wing populism, or with a particular social stratum, religious group, ethnic group and so on. For example, Hungarian prime minister Viktor Orbán has been known to stress that as a politician, he is dedicated to serve the country, presenting the abstract 'will of the people' as the highest decision guiding principle in politics. For Orbán, 'the government either does what the people want or it will become oustable' (Orbán, 2007a, as cited in Seongcheol, 2021, p. 339). The existence of a unified people's will is usually demonstrated through statements that claim to know what people, as an abstract mass, want/refuse, or what they like/dislike.

On the other side of the dualistic struggle, stands *the evil elite*. Populists are preoccupied with discovering and identifying their enemy, as this process helps to 'negatively constitute the people' (Hawkins, 2009, p. 1044). Within the Manichaean discourse, it is common that a conspiring minority of elites has subverted the will of the people and now has an illegitimate control over some aspects of the governance (Hawkins, 2010). The identity of the enemy may vary according to a given context. These may be intellectuals,

democratic institutions or media, international political actors, a particular ideology and so on. For example, members of Poland's ruling Law and Justice party have verbally attacked the Constitutional Court judges for 'impeding governments' attempts to deliver its electoral promises to the people' (Kelemen & Orenstein, 2016, p. 4). Leader of the ruling party, Jarosław Kaczyński, has boasted that he wants to break up the 'band of cronies' in the nation's highest judicial body, accusing them of 'only protecting their own interests' (Agence France-Presse, 2015).

As our unit of analysis is a whole performance of an actor in a debate, one coding rubric is assigned per one performance (4 performances per actor, 16 in total). The outcome of the coding constitutes a filled-out rubric with a score and a set of representative quotes for each of three core elements of populist discourse described above.

6 Grading

When it comes to the actual grading of the debates, coders have employed decimal scores ranging from 0.0 to 2.0 to evaluate the presence of populist discourse in each textual transcript of a performance delivered during the debate. These grades should be based on the presence or absence of particular elements of populist discourse (codes) described in the previous section. As described by Hawkins (2009), the 0–1–2 scale for overall grading of textual sources is defined as follows:

0 (0–0.4): A speech in this category uses few if any populist elements. Such speech act is not considered populist as it lacks the simultaneous presence of some notion of a popular will in a conflict with an evil, conspiring elite.

1 (0.5–1.4): A speech in this category includes strong, clearly populist elements but either does not use them consistently or tempers them by including non-populist elements.

2 (1.5–2.0): A speech in this category is extremely populist and comes very close to the ideal populist discourse. Such performance expresses all or nearly all of the elements of ideal populist discourse and has few elements that would be considered non-populist.

As for coding non-populist elements, Hawkins' (2009) coding rubric has space reserved for pluralist appeals to be filled in. Coders were therefore asked not only to translate and copy citations that capture populist elements, but also pluralist ones. Political pluralism rejects an idea of a homogenous, general will, acknowledging plurality of opinions within society. As a direct opposite to the dualistic perspective of populism, pluralists believe that a society should have many centres of power and that politics should reflect the interests and values of as many different groups as possible (Hawkins et al., 2018). In terms of the 'evil elite notion', pluralism does not single out any evil ruling minority and refrains from describing the political opposition as evil. By providing exemplary quotes that demonstrate pluralist appeals, a coder can prove that a particular performance also demonstrates non-populist elements and should therefore be considered less populist. To put it simply, the more populist a particular discourse is, the fewer pluralist elements it will feature, and vice versa (Hawkins et al., 2018).

The decimal grades located in between, are mainly used to avoid the difficulty of having to decide between the three blunt categories (0, 1, 2), if one considers the presence and prominence of populist features in a particular discourse to be somewhere in be-

tween. This allows the coder to demonstrate even the slightest differentiation between two different populist performances, by moving up or down on the scale based on the consistency and prominence of the analysed dimensions. The general rule however is that 0.5 rounds up to a categorical 1, and 1.5 rounds up to a categorical 2. These qualitative differences should therefore be considered when assigning a decimal point to a particular discourse (Hawkins & Kaltwasser, 2017).

The overall grade for a particular performance has been assigned based on the presence and prominence of the three core populist dimensions. Coders were asked to first give individual grades (0.0–2.0) for each populist element/dimension: *Manichean discourse*, *people-centredness* and *anti-elitism*, and support these grades by representative quotes. After obtaining these individual grades, an overall grade was assigned to the performance which would categorise a particular discourse through the three-point scale (0–1–2). It is important to stress that two of the elements, *populist notion of the people* and the *notion of the evil elite*, are jointly necessary to be present in a textual source for it to be considered at least somehow populist (Hawkins, 2010).

Generally, if only two of the three core elements – people centrism and anti-elitism – are present in a performance, the overall grade for such performance cannot exceed the value of 1.4, as this is the highest decimal number that still rounds to 1. If each of the three core elements is present in the performance, a particular discourse can receive a grade between 1.5–2.0 and can be considered an ideal populist discourse. The presence of the first populist element, the *Manichean vision*, demonstrated through strong, dualistic language therefore helps to distinguish an ideal populist discourse (1.5–2.0) from an ordinary populist one (0.5–1.4). Finally, a discourse which receives an overall grade of 0.4 or lower (as this rounds down to 0), will most likely demonstrate only one, or none of the core elements, and will therefore not be considered populist.

To summarise, the whole grading process proceeded as follows: First, coders went through the data by analysing the transcriptions of performances delivered by politicians in television debates. While doing so, coders were supposed to write down representative quotes which demonstrate the presence of any of the three core elements of populist discourse. These would then be filled into relevant rubrics' slots with a grade assigned for each individual element based on the presence and prominence of a particular core populist element in a debate. Coders were also asked to write down and fill in representative quotes which have had elements of pluralist/pragmatist ideas operationalized in the rubric, in order to prove that a particular performance is less populist or not populist at all. Coders then finally assigned an overall grade to the performance based on the overall presence/absence of the populist elements. In the next part, we present our results and provide a brief qualitative summary of coders' judgments and comments, which have been used to justify the allocation of the overall grades.

7 Results

This section is an overview of the debate performances of the four politicians and a description of the populist elements in their speech. Table 1 summarises the overall grades per performance which have been derived from the holistic grading process, with the rounded overall grade highlighted in bold:

Table 1 Summary of measurement results (rounded grade/decimal grade).

DEBATE → ACTOR ↓	1st	2nd	3rd	4th
Igor Matovič	**1** (1.1*) 26.01.2020 (TA3)** C1: 1.0 C2: 1.2	**1** (0.9) 02.02.2020 (RTVS) C1: 0.8 C2: 1.0	**1** (1.4) 23.02.2020 (RTVS) C1: 1.6 C2: 1.2	**2** (1.7) 26.02.2020 (RTVS) C1: 1.7 C2: 1.6
Boris Kollár	**1** (1.3) 01.12.2019 (TA3) C1: 1.2 C2: 1.5	**1** (1.1) 19.01.2020 (TA3) C1: 1.1 C2: 1.0	**1** (0.6) 23.02.2020 (RTVS) C1: 0.7 C2: 0.5	**1** (1.3) 26.02.2020 (RTVS) C1: 1.2 C2: 1.4
Richard Sulík	**0 (**0.4**)** 15.12.2019 (RTVS) C1: 0.4 C2: 0.4	**0** (0.3) 23.02.2020a (TA3) C1: 0.4 C2: 0.2	**0** (0,4) 23.02.2020b (RTVS) C1: 0.4 C2: 0.4	**1** (0.6) 26.02.2020 (RTVS) C1: 0.8 C2: 0.4
Marián Kotleba	**1** (1.2) 19.01.2020 (TA3) C1: 1.4 C2: 0.9	**2** (1.7) 02.02.2020 (RTVS) C1: 1.8 C2: 1.9	**1** (1.4) 23.02.2020 (RTVS) C1: 1.4 C2: 1.4	**2** (1.6) 26.02.2020 (RTVS) C1: 1.8 C2: 1.4

Source: Authors

* We calculated the mean of both overall decimal grades per one performance [(C1 + C2)/2] and then rounded the resulting mean to 0, 1 or 2 in order to get the final grade

** Date of the debate and the channel it was broadcast on (RTVS – Slovak Radio and Television, TA3 – private news channel)

Each overall grade represents the presence and prominence of populist elements which were identified in actor's discourse produced during their appearance on mediated debates that occurred as a part of the 2020 electoral campaign. We have mostly been interested in the rounded final grade (0, 1, 2) in order to evaluate which performances can be identified as moderately populist (1) or ideally populist (2). Now, we will go through each analysed actor to briefly address some aspects of their discourse in order to answer the research question laid down in the previous section. The findings which are listed below are based on the analysis of the performances by two independent coders and supported by representative quotes.

We first address our non-populist actor selected to test the validity of the measurement method. Three of the four analysed Sulík's performances have not demonstrated the *conditio sine qua non* to be considered even moderately populist. While Sulík has frequently voiced strong anti-elitist appeals, such as in, 'The oligarchs ruled the state, the mafia subjugated the decision-making components of the state to its own will' (23.02.2020b), he mostly refrains from employing inward, people-centric appeals, and his discourse lacks the identification of a 'general people's will', as he does not claim to know what people want, or what they think. His only populist performance (26.02.2020) was graded as such (1) because he claimed to know which solutions are good for 'the people', and which ones

are bad: 'For people who have worked for 40 years and have miserable pensions – this is not a solution!' Sulík also stresses that his party is already prepared to govern and help the people, when he notes that 'We have prepared 100 immediate solutions for the first 100 days of our governance, for employers, and also, 100 solutions for the people' (26.02.2020). Such statement evokes that there are unresolved problems which 'people' as an abstract, unified group are experiencing under the incumbent government, that are in need of an 'immediate' solution. The presence of populist elements in this performance has however been quite latent, with one of the coders even grading this performance as non-populist (0). Still, this particular performance (26.02.2020) was also marked by the presence of openly Manichean language, particularly when Sulík notes that:

> We will face a struggle for the future character of our state, a struggle over whether the oligarchs will continue to control our government, whether we will have rampant bureaucracy, present corruption and rotten judiciary, or whether we will live in a country where decency is in vogue, where there is rule of law, where one can invoke his rights because law rules. We offer the latter. (26.02.2020)

In the above quote, it is evident that Sulík demonstrates a dualistic (black and white) understanding of politics in regard to the forthcoming elections and the future of Slovakia, as he clearly does not acknowledge that even in a system with a decent rule of law, corruption, to a certain degree, will always be present. By creating only two possible scenarios on how the country will look after the elections, any middle position is absent, which, according to Hawkins' (2010) conceptualization, would make Sulík's discourse populist. However, all of Sulík's performances, including the moderately populist ones, have also demonstrated strong pragmatism, pluralist understanding of politics, and a focus on narrow issues and concrete data, for example in, 'We have introduced our manifesto with more than 1100 concrete solutions, and one of them specifically deals with our political system …' (23.02.2020a).

Matovič's performances have all been graded as populist (1), or ideally populist (2). All of his performances therefore demonstrated the essential elements of populist discourse defined by the ideational approach, as people-centeredness and anti-elitism have been both simultaneously present in each of them. Matovič envisions himself as a representative of the ordinary people, who were, according to him, robbed by the previous governments that participated in wide scale corruption activities. The people-centric theme comes through clearly in the 23.02.2020 debate: 'What is most important for me in politics is to work with the people, work for the people and to prevent stealing.' His explicit reference to the 'ordinary people' as an entity has been frequent, and he further specifies that when he (his party) gets to participate in the government, all honest people will be better off while the 'dodgers and cheaters' will be punished. As for the Manichean language, Matovič demonstrated a strong, dualistic perception of politics in Slovakia, when he addresses the people with a mobilisation call, '… let's change this, let's create a country where all honest people would like to live and where bad people will be afraid of being prosecuted and sentenced …' (26.02.2020). A middle position is clearly absent in this statement and Matovič evidently simplifies the political competition in his country by presenting it as a moral struggle between those who can be labelled as 'honest' opposed to those whom he considers 'dishonest'.

As for the identity of the evil elites, Matovič claims that the key sectors of the state (the judiciary and the healthcare system) are controlled by figures that have connections to organised crime and these individuals have to be removed and replaced in order to create a country where 'ordinary, honest people can feel hope.' In his own words, the system has been subverted by corrupt politicians that have stolen from the people for the last 12 years and requires an immediate change. This has been noted by Matovič during his performance on 23.02.2020, 'The government has willingly handed over our Slovak state, with its key institutions, specifically those which are supposed to secure justice, into the hands of organised crime.' Matovič considers the fight against such corruption as his personal struggle, putting his own life at stake, when he notes on 02.02.2020: 'I have stood against the "evil" without a single policeman, the police controlled by mafia crime syndicates has been after me …' On several occasions, Matovič envisions himself as a key figure in the fight against corruption in Slovak politics – he even defines this issue as the core political agenda of his party, when he notes during his 26.2.2020 performance that 'Our key programme is the fight against organised crime and corruption, which I have been engaging in for the last 10 years.' Matovič therefore perceives the forthcoming elections not as a competition defined through ideological differences, but rather as a struggle between two antagonistic blocs defined through moral terms: parties which represent the 'ordinary, honest people' versus parties that are formed by 'corrupt politicians' connected to organised crime groups. He appeals to the will of the people and claims that he will stop the looting of the state and the enrichment of the latter group at the expense of the former. His antagonism is therefore mainly directed towards representatives of the former governing coalition, specifically SMER – SD (Direction – Social Democracy). This is summarised in his statement delivered during the last few minutes of the 23.02.2020 debate: 'They [SMER – SD], have been responsible for Slovakia's suffering for long, 12 years.'

Though the elements of populist discourse are certainly present in all analysed Matovič's performances, on a few occasions, we have been able to identify appeals that could be categorised as pluralist. For example, during his performance on 02.02.2020, Matovič states that '… it should not be said that we have one common opinion, as one nation and one entity, because we do not …' Such a statement clearly presents an anti-populist position, as it acknowledges the existence of justifiable differences in opinions between various political identities. Despite that, Matovič's 02.02.2020 performance has still been graded as moderately populist (1), as it also demonstrates a notable incidence of key populist elements.

When it comes to Kollár, all of his analysed performances have been graded as moderately populist (1), meaning that they demonstrated a simultaneous and consistent presence of both people-centred and anti-elitist appeals. It is also quite evident that Kollár's unmediated connection to 'the people' has been a dominant element of his discourse. He claims that with his political party, We Are Family, he travels through the country, talks to the people on a regular basis and listens to their problems, 'These are not my conditions; these are the conditions of those 5 million people who we talk to on a regular basis. These are not the conditions of Boris Kollár, people demand them!' (19.01.2020). The narrative of 5 million helpless people who are in need of immediate aid from above presents a recurring motive in Kollár's discourse. This is most notably evident in, 'Finally, parties have to come, that will take care of those ordinary 5 million people' (01.12.2020). Object-

ively, a single political party cannot represent the interest of 5 million people in a country of 5.5 million political identities. Yet Kollár also claims that he has entered politics to specifically take care of those 'unlucky' 5 million, arguing that 'People need a party like We Are Family, which would represent ordinary people in the government …' (26.02.2020). Without Kollár's participation in the government, elites will simply remain unresponsive to people's demands.

The use of language forms such as, 'people do not want this', 'people refuse it', 'people are tired of it' only further demonstrates that Kollár acknowledges (at least through his discourse) the existence of a unified, general people's will (01.12.2019). Kollár claims to be a direct representative of these people, going even as far as stating that by insulting his party, 'you are insulting the people which we represent' – an insult against him, is an insult against the people, thus idealising himself as the personification of the people's will (19.01.2020).

On the other side of the spectrum, as the evil elite group stand the privatisers and oligarchs who are in control of the system and are, according to Kollár, funding his political adversaries, SMER – SD and the Slovak National Party. Kollár further claims that financial groups led by these oligarchs are abusing the justice and health sectors and are enriching themselves at the expense of the ordinary people: '… now, we can see how organised crime has been able to manipulate courts, prosecutors, and reach the highest places' (23.02.2020). He does not see any positives when it comes to Slovak political elites and throws all previous governments in the same bag stating that 'Those governments, that have been alternating here, have robbed the people and caused misery' (19.01.2020).

Apart from these adversaries, Kollár also stands against liberals and the liberal ideology in general, as he argues that the promotion of liberal values, through approval of registered partnerships and adoptions for same sex couples, is disrupting the Slovak cultural tradition. This is most notably evident in his 01.12.2019 performance on TA3 when he notes that 'We must confront all these liberal efforts to disrupt our traditions and our history …' and further adds that '… liberals perceive it superficially.' Kollár also frames the issue of migrants in Slovakia as being part of the liberal agenda and argues that by accepting migrants Slovaks will 'destroy our culture and our traditions' (01.12.2019).

Pluralist appeals are very latent in Kollár's case. The bulk of his non-populist appeals is rather formed by pragmatic arguments, when he, for example, praises international institutions, such as the EU in, '[the] European Union is a great project, and we need it; we would go bankrupt without it' or acknowledges that without EU funding, 'we would not be able to build a lot of things. These funds helped us to move Slovakia forward, without them, it would not be possible' (23.02.2021).

Finally, we come to the case of Marián Kotleba. Two of his performances have been graded as populist (1) while the other two were graded as ideally populist (2). What made two of his performances ideally populist (02.02.2020 and 26.02.2020) was his staunch, dualistic framing of particular issues, on which no middle position could be taken and one's position on the issue would define one's overall character. This is clearly demonstrated during the 26.02.2020 debate on RTVS, where he notes that, 'If someone says that the 13th-month pension proposal is some kind of an electoral corruption or looting of the state funds, he is saying this without any respect for his parents, they deserve it!' The idea that one's position on a particular proposed policy reflects the quality of relationship with his/

her parents is a textbook example of moralization. The language which Kotleba employed has also been highly bellicose. On one occasion, he referred to a group of protesters as 'drugged fanatics which the liberal parties are sending to our meetings' (02.02.2020). During the same debate, he also addresses other party leaders by saying '…let's all stop the progressive evil together', with the 'progressive evil' referring to the liberal-centrist coalition which also took part in the 2020 elections.

As for the notion of 'the people' in Kotleba's discourse, he claims to represent the interest of all 'vulnerable groups' of the Slovak society: retirees who struggle with their low pensions, people living in the eastern, poorer regions of the country but also all ordinary people who pay large amounts of taxes but get nothing from the government in return. During his participation on the 23.02.2020 RTVS debate, he claims their party 'perceive[s] politics as a service to the people, to the nation and not as service to oligarchs.' Kotleba's economic proposals also reflect his people-centrism and strong distrust towards business elites when he notes that 'Instead of giving it to oligarchs, we will return the money to the people, by lowering the value-added tax, and the people will be better off then' (19.01.2020). Such calls for a more people-oriented income redistribution occur on numerous occasions, also for example in 'We cannot give money to Brussels first, and only after that give what is left to the people' (23.02.2020).

It should be noted that when speaking about ordinary people, Kotleba mainly refers to those who adhere to Christianity, nationalism, and conservatism – purported key aspects of his party's ideology. He notes that '… we will continue our fight for a Christian and national Slovakia, regardless of the fact that they will call us extremists or criminalise us' (02.02.2020). Kotleba perceives his role in politics as a service to people, who have 'worked honestly' during their whole lives, now 'living from hand to mouth' as the government, according to Kotleba, does not care about ordinary people (19.01.2020).

When it comes to apportioning blame, the list goes on and on. The evil elite is identified with wealthy oligarchs, who have been abusing the system while secretly controlling the governing parties, which are then responsible for the disastrous state of the welfare system, healthcare, and the judiciary. Kotleba claims that his party is the only party 'not soaked in corruption' and that the existing, disastrous situation should be blamed on 'all other political parties' (19.01.2020). Kotleba is critical towards both 'traditional parties', when he notes that 'all these traditional parties have been looting and destroying … and Matovič's party has not been an exception' but also speaks negatively about candidates that describe themselves as 'new': 'Politicians, who took part in privatisation, took part in looting of our national property are presenting themselves as new politicians today' (02.02.2020). This clear distinction drawn between 'us' and 'other parties' is also evident in Kotleba's claim that 'Since 1993, all governments have been doing the same thing; raising our national debt, opening up social inequalities and subordinating Slovakia to the will of foreign masters' (26.02.2020).

It also became increasingly evident that Kotleba attempts to distance himself from liberalism and its moral and political attributes, refusing to cooperate with any political party that could be categorised as 'liberal,' for example in the 23.02.2020 RTVS debate: 'We are the only party that will not form a government with these fanatic liberals and the only party which can protect Slovakia from the liberal devastation which we can see in Western Europe …'

Thus, another group of conspiring elites which Kotleba identifies as evil are the liberal parties who, according to Kotleba, are working in tandem with various NGOs, with the aim of spreading the 'liberal agenda' across Slovak primary and secondary schools, most notably during the 26.02.2020 RTVS debate: 'Mainly because, today, our high schools but also primary schools are under the influence of malignant, anti-Slovak, anti-national, anti-Christian NGOs, who often directly interfere with the teaching process …'

International entities are also subjected to harsh criticism. NATO is considered to be a 'terrorist, criminal organization' (02.02.2020). The EU is blamed for 'pushing migrants inside our borders' and for 'propagating gender ideology' (23.02.2020). Kotleba criticises the former establishment for having '… enough money to pay protection rackets to the European Union' but not being able to find money for the retirees (23.02.2020). The press is also attacked, when Kotleba describes the editors of one journal as 'tabloid rats' (02.02.2020). Overall, it can be said that Kotleba's discourse has been the most antagonistic of all four analysed actors, as his list of evil elites who are working against the interest of the Slovak people is the most comprehensive one. We were not able to identify any openly pragmatist/pluralist statements delivered by Kotleba in the analysed corpus.

Overall, we can see a consistent populist performance in cases of Boris Kollár, Igor Matovič, and Marián Kotleba with one and two extremely populist performances from the latter two politicians, respectively. We now turn to discussing these findings and summarizing the main outcomes of our research.

8 Discussion

We can now claim that populism, defined as a specific type of discourse through the ideational approach, has been present in the performances of three Slovak party leaders (Matovič, Kollár, Kotleba), who were previously identified as populist in the academic literature. Each performance of these three actors had at least the notion of the people/unified will and the notion of the evil elite present. As for the similarities, it is clear that these three actors have claimed that they represent the ordinary people, while also demonstrating a staunch interest in the improvement of the social status of those that are worse off financially. Matovič, Kotleba, and Kollár have also explicitly stated that the government should be formed in such a way, that it will reflect an abstract, unified 'will of the people'. The idea that politics should be perceived as a 'service to the people' features prominently in the discourse of all three alleged populist actors. Each one of them also framed the previous governments as corrupt and unresponsive to people's needs, each promising change once in power. The idea of a necessity for some kind of a 'revolution through elections' which will make these 'pro-people' movements part of the government, so they finally get the opportunity to deliver electoral promises made to the 'ordinary people,' could also be identified in the discourse of each analysed actor. All analysed actors thus presented themselves as a reasonable alternative to the incumbent power holders, which bears logic due to their prolonged status of political opposition within the power structure.

When it comes to the notion of the evil elite, each analysed actor has framed the corrupt politicians, oligarchs, and financial groups as a part of a larger 'scheme' responsible

for the detrimental situation in the country. The blame has been often directly attributed to long-governing SMER – SD and its coalition partners, who have been condemned for allowing organised crime and 'shady' interest groups to penetrate the executive, as a means of self-enrichment and power usurpation. With some members of the executive being openly accused of their personal connections to the mob, these corrupt governments have been described as unresponsive to people's demands, often incapable of resolving the country's problems. Such verbal attacks were prominent even in performances that have been graded as non-populist (as in the case of Richard Sulík). Furthermore, two of the analysed actors (Kollár and Kotleba) also framed 'liberal' parties and the 'liberal agenda' as dangerous or harmful to the interest of the Slovak people and their 'traditional culture'. When it comes to anti-EU sentiment, its presence has been observed only in the discourse of Marián Kotleba, who, on numerous occasions, constructed a narrative of 'evil Brussels' elites' who are 'imposing' their agenda on the Slovak people, often against their will. Three debate performances, Matovič (26.02.2020) and Kotleba (02.02.2020, 26.02.2020), have been graded as extremely populist (2) due to the presence of an explicitly Manichean framing in their discourse, accompanied by the use of emotionally charged, often offensive language, or even the demonization of political opponents (in addition to the essential populist people/elite dichotomy).

As for the presence of pluralist, non-populist appeals, these have been observed in the discourse of two 'allegedly' populist actors – Kollár and Matovič – being demonstrated in Kollár's respect for the EU as an international organisation and Matovič's acknowledgment that the plurality of opinions should be considered natural in a democratic society. Such narratives indicate that even politicians who have been generally qualified as populist may employ non-populist, or openly anti-populist appeals in their narratives, supporting the idea that populism – operationalized as a type of discursive style – should be perceived as 'an attribute of the message and not the speaker' (Bonikowski & Gidron, 2016, p. 19). Thus, in order to avoid excessive normativeness, we should not be too quick to attribute the quality of being 'populist' to 'particular parties or leaders' and rather use this ambiguous adjective to describe 'particular actions and policy proposals' of these actors (Deegan-Krause & Haughton, 2009, p. 822),

However, when it comes to the presence of the key populist elements defined through the ideational approach, it can be said that the discourse of the three allegedly populist actors demonstrated more similarities than differences, as all of them have been able to develop a consistent populist narrative throughout their performances – that of the ordinary people and their will positioned against the corrupt power bloc and its selfish interests.

9 Conclusion

After conducting and evaluating the measurement process, we can claim that Hawkins' (2009) method of 'holistic grading' has been able to identify the key elements of populist discourse in the performances of Slovak party leaders. While this measurement method has been so far mostly employed on manifestos and speeches, it has now proven to be also useful in analysing mediated discourse delivered as a part of televised debates. All three

actors that have been previously described as populist by academia have received an overall grade per performance of 1 or higher. This means that the discourse produced by these actors, delivered as a part of the electoral debates, featured an idea of a unified popular will in confrontation with an evil, conspiring elite. The discourse of these actors can therefore be considered populist and their description as such by scholars seems adequate. Still, discrepancies between academic definitions and popular use of the concept may exist and are very likely. In the case of our analysis however, these three actors (Matovič, Kollár, Kotleba) partially 'deserve' the label assigned to them by scholars, as far as the empirical findings derived from our analysis are concerned, with the caveat that we focused on their particular messages and discursive styles, which also evinced an occasional pluralist stance from some of them. In line with our research question, we have shown that three of the four analysed actors demonstrated elements of populist discourse in their performances. However, we have analysed only a relatively short time frame of performances. Our findings are limited and may be challenged by new data. We acknowledge there might be cases of performances where these actors do not demonstrate any populist elements. Further research might establish a solid claim regarding the attribute of 'being populist'.

The use of Hawkins' (2009) holistic grading method on speech acts of politicians from different regions allows for cross country comparison in terms of populist elements present in their rhetoric. Furthermore, this allows for the interpretation of the impact that contextual factors of a particular region may have on the narratives produced by local populist actors. Such quantitative representation of the presence and prominence of populist elements in a particular speech act may also provide insight into the development that certain actors can undergo in terms of their rhetoric under the influence of various factors. Do politicians become less populist once they win the election and successfully enter the executive? Do they become more populist in times of temporary crisis? These are just several hypotheses discussed in the current academic debate on populism, which could be answered by the use of a systematic method similar to the one employed in our work. Overall, we are confident that more insight may be obtained in populism studies from the process of empirically capturing and then quantitatively representing the degree of populist elements in actors' discourse.

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02. 02. 2020, RTVS, electoral discussion

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26. 02. 2020, RTVS, leaders' debate

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Making new 'Solidarities': The Polish intelligentsia and the lasting legacy of the historical social movement

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Abstract

This article returns to sociological investigation of the intriguing phenomenon of the Solidarity social movement. Contrary to a popular position which sees Solidarity as important but closed chapter in Polish history, we argue that its legacy, in contrast to other historic events such as Prague's spring and Hungarian uprising, should be seen as an ongoing social process in Poland and in the broader region of Eastern and Central Europe. In order to lay out our argument we describe Polish intelligentsia members' practices aimed at the reproduction and strengthening of the legacy of Solidarity – an important tool which legitimizes intelligentsia's dominant position in the post-communist Poland. In the empirical part we are particularly interested in analysis of efforts aimed at strengthening the legacy of Solidarity by universalizing it at the transnational level, which we analyzed on the case study of interaction between members of the Polish and Ukrainian elites.

Keywords: Solidarity; Poland; Ukraine; elites; intelligentsia

1 Introduction

The Solidarity social movement is commonly presented as one of the greatest achievements of Polish society in the 20th century. Some have even compared it to such social phenomena as the civil rights movement in the U.S. and the anti-apartheid movement in South Africa (Kubik, 2015). However, a number of intellectuals as well as scholars have argued that the social energy Solidarity generated dissipated after 1989 (Krasnodębski, 2011; Krzemiński, 2013; Kubik & Linch, 2006), leaving it as an event belonging to the past, alongside such events as the Hungarian Uprising of 1956 and the Prague Spring of 1968. In consequence, works on the heritage of Solidarity can be located most often within the field of memory studies and memory policy research (cf. Pearce, 2015).

Contrary to this position, we will show that the legacy of Solidarity still functions as an active semantic frame, which is being related to ongoing political processes in contemporary Poland and to political developments in other states of Central and Eastern

Europe. We explain its persistent functioning by interpreting it as an important item of symbolic capital confirming and strengthening Poland's distinctive role within the Western world, and the dominant position of the Polish intelligentsia elite[1] as the key actor fulfilling this role.

We argue that Polish intelligentsia's social practices that reinforce the significance of the Solidarity movement, also valorize the significance of the anti-communist opposition, the core of which was the intelligentsia. This group stood at the forefront of Solidarity, especially after the trade union was delegalized (following the introduction of the martial law in 1981) and had to 'go clandestine'. Anti-communist intelligentsia members later became the main domestic interlocutors with the ruling communist elite, during the so-called Round Table Talks. At least in the dominant narratives, the fact that in the frame of Solidarity, most of society, led by the intelligentsia counter-elite, disobeyed the Communist Party confirms the democratic mandate for this social group to hold political power after the fall of the communist system.

Indeed, it was the intelligentsia elite that reached for full political and symbolic power in 1989, which can also explain why the Solidarity revolution was never considered to be completely over. For it should be remembered that not only does the Solidarity trade union still exist (although in 1989 there were numerous voices that its name should be changed in connection with the fall of communism), but – as we will show – a number of institutions and informal circles declare that they are engaged in further implementation of Solidarity's ideals, both in Poland and on the international scene.

The legacy of the Solidarity movement is also important for Polish elites as one of the main symbolic tools legitimizing Poland's distinctive role in the Western community. The legacy of this movement includes its interpretation as a milestone on the road to the peaceful dismantling of the Eastern Bloc and the expansion of the zone of democratic order. Thus, the importance of the legacy of Solidarity is also related to its function as a narrative legitimizing Poland's engagement in geopolitical transformation in Eastern Europe after 1989, including in the first place in Ukraine. Contrary to approaches that interpret this engagement in terms of imperial ambitions (Markov, 2013) or as motivated by Russophobia (Taras, 2014) we see this phenomenon in terms of class interests – as motivated by the desire to accumulate the symbolic capital related to the legacy of Solidarity. Thus, the Solidarity legacy is a factor that both legitimizes the above-mentioned engagement and provides incentives for such activities.

The legacy of Solidarity is particularly interesting due to its functioning at the transnational level as an 'expanding' phenomenon. What we mean here, is that in order to reproduce and strengthen the legacy of Solidarity through its universalization, the Polish elite has attempted to symbolically incorporate contemporary political and social processes in Eastern Europe into the tradition started by the movement. Within this framework, these events become 'new Solidarities' and actors involved in the events – new

[1] Following Eyal, Szelenyi and Townsley (1994) as well as Zarycki (2009) we understand the intelligentsia elite as a group that bases its social position mainly on cultural capital; in contrast to the bourgeoisie (economic capital) or the nomenklatura (political capital).

'heirs' to Solidarity. The uniqueness of this phenomenon can be seen when contrasted with other mythologized movements leading to the overthrow of communism, such as the Czechoslovak 'Velvet Revolution' or the Baltic 'movements in support of perestroika' like 'Sajudis'. The symbolism of none of these is actively used today to describe contemporary political processes, either in specific countries or in the international space.

We analyze this process on the case study of Polish–Ukrainian relations and the Revolution of Dignity in 2014. The second Maidan revolution – seen as one of the most important steps in geopolitical reorientation of the post-soviet space – was an event that generated enormous engagement within Polish elites and wider parts of society. Against the backdrop of a widespread activity of Polish elites, the functioning of discourses related to Solidarity is thus particularly observable.

As we will show, the attempts to 'brand' this event as a continuation of the Solidarity tradition by Poles have been accepted by some important parts of the Ukrainian elite, including the highest representatives of political power and politically involved intelligentsia members. Their use of the 'new Solidarities discourse' can be seen as a compensation for Polish support for their cause. Last but not least, a similar appreciation for Polish elites in the form of legitimization for such symbolic incorporations also comes from Western elites, particularly Americans.[2]

In order to show the functioning of the legacy of Solidarity in Polish–Ukrainian relations, we will focus on the elites' interactions within two 'social spaces': the highest echelons of the political elites, and on spontaneous interactions between members of the Ukrainian diaspora in Poland, who were active during protests in Warsaw supporting the Revolution of Dignity and Poles, who joined these street actions (Dunin-Wąsowicz & Fomina, 2019; Łada & Böttger, 2019; Lapshyna, 2019). The first case, encompassing official addresses by leaders of both countries in their parliaments, can be seen as an indicator of a certain 'weight', that the discourse of 'new Solidarities' achieved – being included in the symbolic framework of mutual relations.

In contrast, the second case seems very useful as an example of a quite spontaneous and yet spectacular functioning of the legacy of Solidarity outside the cabinets of elected officials – illustrating the breadth and multidimensionality of this discourse within the different elite circles. Although the group under study is restricted to supporters of a certain set of socio-political ideas (which can be summarized as a support for pro-Western geopolitical orientation of Ukraine), it is relevant also due to gradual yet constant strengthening of such stance withing Ukrainian elites and broader parts of society as well as in the face of strengthening of Polish–Ukrainian relations during the recent phase of the Russian invasion in Ukraine. We may thus argue that the synchronization in the symbolic sphere, described in this article will likely play even more important role, should such rapprochement continue.

We see the legacy of Solidarity primarily as a discursive tool and a symbolic item. However, in contrast to approaches that locate this phenomenon solely in a symbolic

[2] In his speech in 2014, the then American president Barack Obama announced: 'The Ukrainians of today are the heirs of Solidarity – men and women like you who dared to challenge a bankrupt regime' (Obama, 2014).

sphere (Ciżewska, 2010; Gawin, 2002), we will try to show that it is strongly embedded in a non-discursive sphere. The proposed perspective thus contributes to analysis of symbolic struggles among CEE elites (Zubrzycki, 2006), especially within the non-culturalist paradigm which departs from explaining the mechanisms of contemporary Polish society from a solely culturalistic perspective (cf. Zarycki et al., 2017). Moreover, sociological profile of the Ukrainian activists and their Polish counterparts (described in the next parts of this article) – suggesting their proximity to Polish intelligentsia – further elucidate the often-omitted class dimension of functioning of different identity discourses in CEE, including the one on the Solidarity legacy.

This article will focus on the analysis and critical reinterpretation of the practices of commemorating and reproducing the Solidarity movement and its legacy. First, through institutions created to popularize the legacy of Solidarity and social practices such as naming the streets and erecting commemorative monuments. Second, through synchronization of interests and actions of several other institutions and groups within the given symbolic frame. Thus, this work contributes to memory studies in CEE memory studies and memory policy research (Bernhard & Kubik, 2014).

Solidarity's legacy is used to legitimize contemporary political or even economic interests (through their universalization). At the same time, such active uses of a given legacy, confer on it the status of a 'real' social phenomenon. This is well visible in the case of Polish–Ukrainian relations, in which an important background for synchronization in the symbolic sphere between elites of the two countries has been created through political actions and material assistance.

2 Methodology and data

The empirical part of the article is based primarily on qualitative research into discourses voiced by the important parts of the elites of Poland and Ukraine, and on participant observation during protests in Warsaw.

First, we analyze official speeches of the highest political leaders from Poland and Ukraine referring to the mutual relations and recent history. We applied a purposeful selection of texts, aiming – on the one hand – at including the key speeches from the point of view of their political salience, and on the other – at gathering speeches that made any reference to the Solidarity movement. In this respect, the speeches delivered by leaders during official visits were of the utmost importance. Such addresses are characterized by a high degree of solemnity. In order to increase the representativeness of the presented discourses, while selecting the texts we tried to take into account politicians from different elite factions, as well as providing a historical perspective – the earliest of the examined texts came from 2005, and the latest from 2021. In such a way, we analyzed some of the most important speeches (guest addresses to joint sessions of parliaments) made by the leaders of both countries during mutual visits since 2005.

Secondly, we analyze the narratives voiced by members of the Ukrainian diaspora in Poland who were involved in organizing public support for the Ukrainian Revolution of Dignity. For this purpose, we use empirical material from in-depth semi-structured inter-

views conducted in Warsaw and Wrocław,[3] in 2015 and 2016. The respondents were predominantly activists associated with NGOs operating in Poland. The basic criterion for selection was their participation in the actions of support for Euromaidan mentioned above. Respondents were recruited through participatory observation centered on various events related to Ukraine and organized by multiple social actors; this lasted for approximately 12 months. We also gained access to some respondents via recommendation (snowball effect).

3 The intelligentsia and the Solidarity movement in previous scholarly interpretations

The spectacular events surrounding the emergence of the Solidarity social movement, which saw representatives of the working class and intelligentsia cooperating on an unprecedented scale prompted a robust scholarly literature. The initial wave of academic publications on the so-called first Solidarity included works by Alain Touraine and his team (1984), Timothy Garton Ash (1984), and Jadwiga Staniszkis (1984).

Perhaps the most famous was the first one, by a well-known theorist of social movements, who interpreted Solidarity as a 'total social movement', encompassing national, democratic, and class-related aspirations. At the same time, he believed that issues of political freedom, which were particularly strongly supported by the intelligentsia, came to the fore over time. This can be interpreted as evidence of the growing influence of representatives of the opposition intelligentsia (including in the frame of the Committee for the Defense of Workers) acting as 'advisors'. The crucial importance of the movement's intelligentsia leaders was emphasized by a number of early accounts of the revolution (Bromke, 1983; Garton Ash, 1984; Pełczyński, 1988). This interpretation was in line with the view presented by the Polish intelligentsia themselves, including its members actively involved in the events (Kołakowski, 1983; Lipski, 1985; Michnik, 1985).

After the collapse of real socialism, Laba (1991) and Goodwyn (1991) presented a 'revisionist' position on the importance of the role played by the intelligentsia. Both argued that Solidarity was primarily a working-class movement, while the role of the intelligentsia was overestimated. They explained this by how representatives of the intelligentsia had acted as intermediaries in contacts with Western observers, through which the former could spread the myth of their central role, among other factors (cf. Karabel, 1992). Goodwyn also referred to 'scholarly over-identification with sundry roles played by intellectuals in politics of protest' (Goodwyn, 1991, p. xxix). Goodwyn and Laba's theses provoked a number of polemics from Western scholars (Bernhard, 1991; Kubik, 1994b; Tymowski, 1991).

[3] 46 interviews were conducted in the frame of the doctoral project on activities of social movements of Ukrainian diaspora members in Poland, conducted by one of the authors of this article. As it turned out, part of this empirical material was consistent with the research questions underpinning this article and could be used to illustrate our thesis.

The question of the significance of the activities of the intelligentsia opposition for the emergence of Solidarity was raised in many other publications published after 1989 (Bernhard, 1993; Kennedy, 1991; Kubik, 1994a; Osa, 1997; Ost, 1990).[4] The class interpretation, however, has rarely been taken up by other scholars (cf. Siermiński, 2020). Thus, the dominant picture of the rise of the Solidarity movement in Polish and foreign academic literature is therefore consistent with that presented by representatives of the Polish intelligentsia.

Similarly, the scarce scientific literature concerning the functioning of the legacy of Solidarity after 1989 corresponds to the view vastly present in Polish public sphere – that this legacy has been lost (Krasnodębski, 2011). In his context, a strong position is taken by Kubik and Linch, who argue that

> 'Solidarity' – one of the most massive and consequential social movements in history – has not had a particularly dazzling political and scholarly afterlife. It was one of the major causes of state socialism's downfall yet it has neither come to play an active and crucial role in the Polish historical memory nor has it entered a canon of routinely studied 'great' revolutions or social movements. (Kubik & Linch, 2006, p. 9)

This interpretation can be combined with Ost's (2005) observations on the dissociation of former Solidarity leaders, led by representatives of the intelligentsia, from the trade union base as part of the introduction of the capitalist order. The disintegration of the social movement – both vertically (divisions between the intelligentsia and the working class) and horizontally (divisions within the elites) – seems indisputable.

On the other hand, other scholars point out, that the symbolic heritage of Solidarity was eagerly used by Polish elites for political purposes after 1989 (Bielasiak, 2010). This included the competition over who were the 'true' heirs of Solidarity, and attempts at social mobilization with reference to the movement's heritage. In our text we would like to complement this complicated picture by pointing out that although Polish intelligentsia elites remain deeply politically divided over the interpretation of Solidarity's legacy, they are united by a neutralized conviction of the value of this legacy, as well as by such an interpretation of it that makes it possible to present the intelligentsia as the rightful heirs of Solidarity.

4 The legacy of Solidarity as Polish intelligentsia's symbolic tool

In order to grasp the meaning and functioning of the Solidarity legacy, one has to take into account a specific feature of the Polish elites: the centrality of the intelligentsia (Zarycki, 2009). This social group, especially prominent in Eastern Europe, bases its social position on the resources of cultural capital.[5] One of the consequences of the hegemony of the intel-

[4] For a comprehensive review of the debate about the roots of Solidarity movement see (Bloom, 2013; Meardi, 2005; Mielczarek, 2019)

[5] The gradual increase of cultural capital at the expanse of political capital in post-communist Central Europe has been first noticed by Eyal et al. (1998); Zarycki (2014).

ligentsia is the great importance that struggles over cultural and identity issues play in Polish social life. The function of these, not always obvious to outside observers, is to establish internal hierarchies through the distribution of a specific symbolic capital (Zarycki et al., 2017).

The legacy of Solidarity can be seen as one of the most important sources of this capital.[6] The appreciation of the importance of this social movement – including its role as one of the main factors contributing to the fall of communism in Eastern Europe – also appreciates the activity of the intelligentsia democratic opposition as the 'heirs' of this movement. The Solidarity experience also validates claims about the agency of Polish society in the frame of major geopolitical changes in the 20th century, in contrast to the post-World War II settlement, symbolized by the detested Yalta agreements.

The role of the legacy of Solidarity as an important resource of symbolic capital within Polish elites can be noticed by observation of their social practices; in particular, actions strengthening and reproducing the legacy of Solidarity. The significance of this myth is shown by the scale of these practices. However, an attempt to present the entirety of actions taken by the Polish elite to strengthen and reproduce the legacy of Solidarity would exceed the scope of this article. It is sufficient to mention regular celebrations of successive anniversaries of the creation of the movement, and the innumerable references to the importance of these events in official political, media, and academic discourses. The symbolic legacy of Solidarity is also present in the architectural dimension, in the form of monuments, commemorative plaques, or street names. Moreover, it appears just as often in the contexts of current political life. It can, for example, be noted, that the current motto of Poland's most important opinion newspaper, *Gazeta Wyborcza,* is 'There is no freedom without Solidarity.'

Importantly, the strengthening and reproduction of Solidarity's heritage also have a strong institutional dimension. As of 2019, Poland has two publicly funded institutions established for this purpose – the European Solidarity Centre (pol. Europejskie Centrum Solidarnośc, ECS) and the Solidarity Heritage Institute (pol. Instytut Dziedzictwa Solidarności, IDS). The existence of two institutions with very similar tasks is related to something else that proves the importance of the Solidarity heritage: the recognition of its significance by all dominant factions within the Polish elite. The first of these institutions was created back in 2007 on the initiative of the Civic Platform and is characterized by a 'liberal' profile. In turn, the Solidarity Heritage Institute, established only in 2019 under the rule of the Law and Justice-led collation, has a 'conservative' profile. A recognition of the movement's role was expressed even by the faction of former communist apparatchiks led by the then-president Aleksander Kwasniewski (Udział Prezydenta RP w Konferencji „Od Solidarności Do Wolności", 2005).

This widespread recognition of the value of Solidarity's heritage simultaneously entails a rivalry, at the core of which is the dispute over the status of the legitimate 'heir[s]' (Bielasiak, 2010). These struggles are particularly intense in the periods before anniver-

[6] One can point to some other similar sources, such as the tradition of the Polish underground during World War II (especially the Home Army) or the Warsaw Uprising. The other example could be famous intelligentsia members such us the anti-communist émigré activist and editor – Jerzy Giedroyć (Turkowski, 2020).

saries of the creation of Solidarity (Szułdrzyński, 2011). Regularly, they even involved court battles over the legal right to use the movement's historical logo (Dąbrowska, 2016; cf. "Nie po to miliony naszych rodaków walczyło o demokrację, aby dziś pluto im w twarz," 2022; Socha, 2021) as well as attempts to strengthen (and weaken) the significance of roles played by particular working class leaders involved in the movement; afterwards affiliated with different intelligentsia factions, such us Lech Wałęsa, Hanna Krzywonos and on the other hand – Anna Walentynowicz and Andrzej Gwiazda.

The attitudes of the Polish intelligentsia elite to the legacy of Solidarity are also clearly visible in one of their typical social practices: the publication of books. In these books, the phenomenon of Solidarity is not only commemorated (thus, reproduced) but also treated as a lasting foundation for legitimizing competing ideas aimed at (re)organizing the Polish state or, more broadly, the public sphere. In this context, looking at only the youngest generations of the Polish intelligentsia, several books can be mentioned (Łuczewski et al., 2015; Mazur, 2017; Rojek, 2009; Siermiński, 2020; Sowa, 2015). The fact that Solidarity is not just an academic or historical issue is visible not only in the content of the abovementioned books but also in the career patterns of their authors. Some of them have held purely political positions; others have been part of advisory bodies to politicians. Finally, references to the expertise in interpreting the Solidarity phenomenon are used to legitimize their contributions to the media sphere on current political issues (Sowa, 2016).

The legacy of Solidarity as a resource of symbolic capital also has an international dimension related to the appreciation of the movement, including in particular from Western elites and societies. This was manifested above all by the Nobel Peace Prize awarded to Solidarity's leader Lech Wałęsa, but also in material support from actors and social groups ranging from the labor movement (Goddeeris, 2010) to political elites (especially American) and the world of culture (Krasnodębski, 2006; Ost, 2016). In Western Europe, Solidarity pushed intellectuals on the road to the final abandoning of socialist economic ideals (Krasnodębski, 2006). In the United States, Solidarity put wind in the sails of American conservatives and their neoconservative foreign policy, which included the idea of democracy promotion around the world (Muravchik, 2002).

Thus, the legacy of Solidarity became one the key symbolic elements in the relationship between Polish and U.S. elites, in particularly their cooperation in supporting post-communist transformations in Eastern Europe. In this context, one can recall the Polish–American initiative 'Community of Democracies.' One of promoters of this initiative, the then Minister of Foreign Affairs Bronisław Geremek (and one of the key leaders of Solidarity) stated during the inauguration ceremony:

> I come from a movement that took the noblest human feeling as its name: Solidarity. And I want to remain faithful to that solidarity. Mature democracies, comprising about a third of the world's states, owe solidarity both to those who are deprived of freedom and those who are building democracy with difficulty. (Montgomery & Jabłońska, 2000)

This example draws attention to another dimension of the phenomenon under scrutiny – that, with the notable exception of Lech Wałęsa, it is mainly the intelligentsia that is able to represent Poland abroad in the frame of elite interactions, particularly on more or less official occasions. This is also true of Solidarity, both historically (Goddeeris, 2011) and after 1989 (cf. Kaczyński, 2006). Such ability to control international elite interactions serves as an additional source of strength and legitimacy for the intelligentsia.

To sum up, the legacy of Solidarity should be seen as a resource of symbolic capital over which various factions of the Polish elite compete. This rivalry, however, should not obscure the fact that, paradoxically the myth of Solidarity is simultaneously strengthened by constant and frequent references by members of intelligentsia, as a whole. In the next part of this article, we will show that the process of reproduction and strengthening of the legacy of Solidarity also works at the transnational level.

5 The legacy of Solidarity in Polish–Ukrainian relations

A good perspective for observing processes of reproduction and strengthening of the legacy of Solidarity at the international level is provided by the analysis of interactions between elites (cf. Kuus, 2004). In this section we will focus on these interactions – resulting in synchronization of symbolic interpretation of political events in Ukraine – in two different social spaces: Parliaments and gathering of activists.

In order to understand the successes of the Polish intelligentsia's efforts in reproduction of Solidarity discourse in cooperation with Ukrainian elites, it is important to see their interactions as embedded in a non-discursive sphere. In the case of relations with Ukrainian political elites, one should consider, in particular, support for Ukraine's integration with the West.

Since 1989 Polish ruling elites have been consistent in their support for Ukraine's integration with the West, lobbying for Ukrainian entry into the EU and NATO, as 'Ukraine's advocate'. Polish politicians were personally engaged during critical moments of political upheavals in Ukraine. Among the most spectacular cases was former president Aleksander Kwaśniewski's mediating mission during the so-called Orange Revolution in 2004. The historical leader of Solidarity, Lech Wałęsa, and many other key Polish politicians also traveled to Kyiv to support the protesters. Similarly, during the Euromaidan, representatives of the Polish political class from both sides of the aisle (including some who were active in Polish Solidarity) readily visited the Maidan. Then foreign affairs minister Radek Sikorski was also engaged in dramatic negotiations between the protesters and Ukrainian authorities.

Back in Poland, they would present these events as falling within the Solidarity tradition, as Kwaśniewski did during the 25th anniversary of Solidarity („Od Solidarności do wolności" Konferencja Międzynarodowa, 2005, p. 13). Importantly for its universalization efforts, such a framing of important political events in Ukraine has been seized on by some of the Ukrainian political leaders themselves. For example, Viktor Yushchenko, who became president on the wave of the Orange Revolution, publicly linked this event (and consequently his access to power) to the legacy of Solidarity (Światowi przywódcy o roli Solidarności, 2005).

Similar references accompanied the second revolution in Ukraine. Thus, in his 2015 speech in the Verkhovna Rada[7] of Ukraine, the then president of Poland – Bronisław Komorowski – pointed out to Ukrainian political elites, the Polish experience of Solidarity as an inspiration for carrying out reforms bringing Ukraine closer to the West:

[7] Verkhovna Rada is the 450-member unicameral national parliament of Ukraine.

> A week ago, I met in Warsaw with a group of deputies to the Verkhovna Rada, representing a new generation of Ukrainian parliamentarians – I can see some of these faces even today in this hall. I admit to being deeply moved during that meeting, because I looked at this group of young, brave people serving their own homeland a little as if I were looking at my own circle from 25 years ago. A milieu of Solidarity people, a milieu of former revolutionaries who grappled with reality, already as a member of civil service, of the government or parliament. I told these young Ukrainian parliamentarians what I really deeply believe – that the Polish experience says clearly that in the face of the greatest danger it is sometimes easiest, or at least necessary, to find in oneself a deep determination to act and to carry out reforms. (Wystąpienie Prezydenta RP w Radzie Najwyższej Ukrainy, 2015)

Again, these words can find positive response from the Ukrainian side – in a solemn speech by the Ukrainian president Petr Poroshenko, which he delivered at the forum of the combined houses of the Polish Parliament shortly after the end of the Revolution of Dignity (and a few months before the speech quoted above by Komorowski). Already the accompanying gestures clearly showed the process of 'extending' and 'accepting' the legacy of Solidarity. The Solidarity heritage was mentioned even before the Ukrainian president started his speech. While introducing him, the then Speaker of the Sejm compared Poroshenko to the leader of Solidarity, Lech Walesa, because of the former's role during the protests in Kyiv's Maidan. In turn, the Ukrainian leader appeared in the parliament with a badge celebrating the 25th anniversary of the 1989 elections, which used the characteristic font from the Solidarity logo. The content of Poroshenko's speech fitted well into the framework outlined by the Polish Speaker of the Sejm. He inscribed the recent events in Ukraine, which catapulted him to the highest post, into the heritage of Solidarity:

> Today Ukraine is a free and democratic country, just as the Polish Solidarity once fought for it. We will always remember this. For this we will always be grateful. ("Uroczyste Zgromadzenie Posłów i Senatorów w dniu 17 grudnia 2014 r.," 2004, p. 3)

In these two crucial speeches made by the leaders of Poland and Ukraine in the months following the Revolution of Dignity, we can see a synchronization of interpretations of this important political event, which included linking it to the tradition started by Solidarity movement.

6 The diaspora in Warsaw on the wave of the revolution in Ukraine

6.1 The US-sponsored platform for interactions between Polish and Ukrainian elites

In order to show the exceptional persistence and 'transnational expansion' of the legacy of Solidarity, we show that the discourse of 'new Solidarities' functions also in spontaneous interactions between Polish and Ukrainian elite members. At the center of our analysis are members of the Ukrainian diaspora who played active roles in activities in support of the Euromaidan in Warsaw. Although the group was diverse in terms of social status, pro-

fessional background, and migration trajectory, its informal core was made up of Ukrainian activists connected to NGOs, media outlets, and the world of academia (Dunin-Wąsowicz & Fomina, 2019; Łada & Böttger, 2019; Lapshyna, 2019); These protests also attracted Poles who wanted to express their solidarity. As with the Ukrainians, among them were representatives of broadly understood elites, drawn from politics, the media, and NGOs (cf. Gawlik, 2014). Thus, we can argue that these interactions occurred among people with a similar social status as members of the intelligentsia.

As in the case of the realm of high politics, the functioning of the discourse of 'new Solidarities' among the community of activists and intellectuals has been founded on strong non-discursive pillars. In particular, one must mention the robust Polish assistance for different segments of societies in Eastern Europe, aimed at integrating these countries with the West. The systematic description of the landscape of actors involved in the support, and the catalogue of their actions, vastly exceeds the scope of this article.[8] Let us just briefly sketch the assistance for our case study: Ukraine, which has been among the most important recipients of this support. We will focus on a few examples of institutions and actions taken towards non-governmental actors in Ukraine, as some of them subsequently ended up as members of the Ukrainian diaspora in Poland, participating in the abovementioned protests.

After 1989, Polish elites launched a number of support projects, sponsored and carried out by both state-affiliated institutions and NGOs, directed at activists, students, researchers, journalists, and artists in Ukraine – roles and professions often occupied by intelligentsia members. Artists and intellectuals were offered the government-sponsored 'Gaude Polonia' scholarships (Kowal, 2017). In the academic sphere, one can point to the Centre for East European Studies at the University of Warsaw, the Graduate School for Social Research at the Institute of Philosophy and Sociology of the Polish Academy of Sciences (GSSR PAN), and the College of Europe in Natolin – as examples of leading institutions educating prospective elites from Ukraine. Alumni include Andrii Deshchytsia, the former Ukrainian minister of foreign affairs and ambassador to Poland at the time of the protests (25 Lat Studium Europy Wschodniej UW, 2015). The Polish intelligentsia has also built bonds with Ukrainian elites through various projects related to media outlets (Galus, 2019).

An important role in the assistance to Poland's eastern neighbors was played by institutions from the Third Sector. As stated by an activist from a prominent umbrella NGO, the Batory Foundation, at the beginning of the 21st century, 'almost all important Polish non-governmental organizations were in various forms engaged in activities [in Ukraine]' (Kosiewski, 2003, pp. 7–8).

An important aspect of the success of creating such a platform for Polish–Ukrainian interaction has been involvement of international donors, including the United States in the first place. Although Polish NGOs were already engaged in Ukraine by the mid-1990s, particularly important was a decision by American donors to redirect assistance for post-communist transformation from Central to Eastern Europe. In these schemes, Polish

[8] For a comprehensive description, see for example Pospieszna (2014).

institutions often played the role of contractors (Petrova, 2012) and the legacy of Solidarity has been used to legitimize such cooperation. As an excellent example, one can point to the Polish–American Freedom Foundation, which launched the Lane Kirkland scholarship program (mainly for Ukrainians) – funded by U.S. donation and named after a legendary American trade union leader who supported Solidarity and assisted it during communist times.

In addition to the name of the program, the persistence of the legacy of Solidarity is visible in the fact that one of the institutions hosting students and coordinating the scholarship program is the Center for East European Studies at the University of Warsaw, founded by a community of former opposition members from the intelligentsia who during the communist period strove to strengthen contacts with anticommunist activists in the Eastern Bloc (Turkowski, 2020, pp. 87–88). Thus, in a symbolic dimension, the Center can be said to continue its underground intelligentsia mission for the integration of the Eastern European elites under the auspices of the US.

Such a Polish–US cooperation was favorable for intelligentsia members who worked in other institutions engaged in support of Ukraine. Some of them had personal experience of being active in the 'original' Solidarity (Chimiak, 2016). Such favorable circumstances allowed them to continue their mission of bringing freedom and democracy to the East as well as to act as important 'heirs' of the Solidarity legacy. Thus, discourses about the legacy of Solidarity have been strongly present, providing a rationale and legitimization for Polish international assistance (Drążkiewicz-Grodzicka, 2015).

Moreover, members of the Ukrainian diaspora in Poland were also engaged in the realization of these programs, thanks to their language skills as well as their local knowledge. In this way they gained activist experience which they later utilized in mobilizing the diaspora during the Euromaidan protests (Dunin-Wąsowicz & Fomina, 2019). One can suspect that such cooperation may have likely exposed Ukrainian diaspora members to discourses on the legacy of Solidarity.

6.2 Maidan as a continuation of Solidarity

The events related to the Ukrainian Revolution of Dignity led to an intensification of the discourses of the 'new Solidarities'. Efforts to build a symbolic bridge linking the events in Ukraine with the history of Solidarity included the use of symbols related to the movement. For example, the authorities of the trade union Solidarity decided to support the Ukrainians by hanging flags over their headquarters with the famous union logo in the colors of the Ukrainian flag. In Gdańsk, by the Monument to the Fallen Shipyard Workers, local authorities together with the European Solidarity Center organized a commemorative ceremony to honor of the victims of protests in Ukraine ("Kilkaset osób wzięło udział w wiecu solidarności z Ukrainą," 2014). Also significant in this context was the establishment of the Civic Committee of Solidarity with Ukraine in January 2014. Its name clearly refers to the tradition of Solidarity with its civic committees, created for the organization of the 1989 election campaign. The newly established committee gathered members of the intelligentsia, including those with experience in the Polish Solidarity movement.

The discourse of 'new Solidarity' reached protesting members of the Ukrainian diaspora, evident from the recollection of one of the Ukrainian activists engaged in protests outside the Ukrainian Embassy:

> During the Maidan, almost every Pole said that we are now experiencing what they were experiencing during the Solidarity movement. They tried to tell us something, help, tell us what they did, share their experience. And many Solidarity activists came to us, they participated very actively and helped in every possible way … For me it was something positive, because such people came with their own experience and willingness to help, and not to lecture someone. I think both we and they understood that we were operating in completely different times. When they told us how they were dealing with samizdat, they were printing some leaflets somewhere in the basement. Fortunately, we didn't have to do it anymore, because there is the Internet and there is Facebook. Our activity has already worked completely differently in practice. However, when it comes to the theory and values for which we and they fought, we rather have a lot in common. [WAW 1]

One can argue that these protests 'triggered' Polish intellectual elite members' memories of their own social and political activities in the frame of Solidarity. One can point to similarities between this period and the 1980s. While back in communist times Polish intellectuals served as 'advisors' to workers, more recently they swiftly adopted the role of 'advisors' to Ukrainians. From a class perspective, one can see here the functioning of a class privilege that allows intelligentsia members to easily take on the role of 'advisors,' most likely, without even sensing the inequality underpinning such a relationship. Here one can again recall the official speech by former president Komorowski, in which he pointed to his milieu as an example to follow.

This mechanism, however, is not restricted to people with personal experience in Solidarity. Another interviewee – a Polish national married to a Ukrainian and also an activist in a Ukrainian diaspora NGO – also made a comparison with the movement:

> Anyway, for my generation, who had no clue what the strikes in the 1980s looked like … because it's not our history and we just don't remember it, it's 2004 when you go out on the street for a good cause and suddenly the world changes and it is as it should be. It was cool, I won't say. Anyway, it was my first experience. [WAW 2]

Thus, one can again stress that such an 'association' or 'memory' exceeds personal or even group boundaries and has become a strong narrative among Polish elites.

Importantly, as we have shown above, through intra-elite interaction this discourse has not only reached but also has been accepted by representatives of Ukrainian elites supporting a pro-European agenda for Ukraine.[9] As one Ukrainian immigrant, who had lived in Poland for three years prior to the outburst of protest, said at the time:

[9] A similar phenomenon can be observed in relations within Belarusian elites. For example, Sviatlana Tsikhanouskaya, one of the leaders of Belarusian opposition, took part in the ceremony inaugurating a monument commemorating the Solidarity movement in Warsaw. Other leaders of the Belarusian opposition made public comparisons between Solidarity and their struggle against Aleksandr Lukashenko's regime (Krzysztoszek, 2021; see also for example Szoszyn & Dyleuski, 2021).

> There is great support from Poles, and, above all, it is an exchange of experiences. They [the Poles] experienced what we have today over 30 years ago. And the Ukrainians today should listen to everything that was happening in Poland back then. (Karpacz-Oboładze, 2022)

One can hypothesize that at least partial motivation/incentive for such references relates to (Western) European ambitions on behalf of this part of Ukrainian elites. In this context Poland, with its political mythology, serves as a point of reference and an important intermediary, which may be seen as the flip side of its role as Ukraine's advocate in the West.

7 Conclusion

In this article we have argued that the phenomenon of the Solidarity social movement is not of a purely historical nature but has been continuously present in social life in Poland since 1989. Moreover, despite the deep factionalization of the Polish elite, there exists a naturalized core, related to Solidarity's legacy which is shared across the political and ideological spectrum. We have identified its function within the Polish intellectual elite as a specific item of symbolic capital reaffirming the intelligentsia's dominant position within Polish society, a mechanism of social hierarchization and for synchronization of political and ideological stances. Thus, one can argue that intra-elite rivalries over the legacy of Solidarity after 1989 should be seen as a sign not of Solidarity's diminished relevance but, on the contrary, of the continued relevance of its legacy.

In order to emphasize the importance of this source of symbolic capital, we have pointed to selected yet substantial and diversified discourses about the legacy of Solidarity as well as to practices aimed at its reproduction and strengthening. At multiple levels, in different social spaces, and in national and international dimensions; the common denominator in all these is the dominant role of the Polish intelligentsia. Although our analysis did not intend to precisely reconstruct the different social fields and spaces, the prevalence of these discourses in different social spaces attests to their pervasiveness within contemporary Poland, and at the transnational level in Central and Eastern Europe. Widespread use of these discourses as well as the above-mentioned rivalry of different factions with the Polish elites over a symbolic capital related to the legacy of Solidarity also indicates that despite the rhetorical radicalism of some of these disputes (leading some commentators even to talk about 'the two Polands'), Polish elites are homogeneous, at least in terms of identifying main stakes and tolls in intra-elite rivalry.

We have argued that practices of reproduction of the legacy of Solidarity also have a transnational dimension, as attested by discursive efforts to universalize this phenomenon by referring to other important social movements in other countries as follow-ups of Solidarity. We have branded this narrative the 'new Solidarities' discourse and analyzed its functioning in the case study of interactions between Polish and Ukrainian elites, especially during and after the Ukrainian Revolution of Dignity.

Our findings allow us not only to better understand internal Polish processes and the symbolic sphere in Polish–Ukrainian relations, but also the motives behind Poland's strong engagement in Ukraine and more broadly in Eastern Europe. Contrary to views

that see certain inequalities in relations between Poland and Ukraine in terms of imperial ambitions – such voices are especially popular in the Russian media sphere[10] – we would argue that the stakes on the Polish side are indeed high for the intelligentsia, but they belong mostly to a symbolic sphere.

Although our case study was limited in time, recent events – with the Russian mass invasion of Ukraine – have confirmed our thesis. Due to limited space, we can only mention 'The Initiative New Solidarity', under which a group of Polish intellectuals from different ideological backgrounds prepared a report focused on a need to adjust public policies in order to be able 'to take care of our guests' – a reference to the massive inflow of Ukrainian refugees after the Russian invasion (Erbel & Łachecki, 2022; Kędzierski, 2022; "Wszyscy musimy się posunąć na ławeczce". "Powstał raport Inicjatywa Nowa Solidarność", 2022). In this context, it is also interesting to refer to the opinion of the well-known French sociologist – Michael Wieviorka, who also interpreted the help for Ukrainian refugees as a revival of Solidarity and contrasted it with the French protest movement of May 1968, which he sees as belonging to the past and no longer inspiring new generations (Wieviorka & Krasnodębski, 2022).

Last but not least, from a methodological point of view, we have presented an innovative approach to studying symbolic struggles among Polish elites. First, we have attempted to capture a social phenomenon by analyzing elites' behavior at different levels, in different contexts, and via different methods (discourse analysis, interviews), in order to show its pervasiveness. Secondly, while trying to explain discursive phenomena, we have gone beyond the discursive or cultural sphere, attempting to reveal their non-discursive foundations.

Our analysis also appears to be a potential contribution to research being conducted in the broader field of memory studies. For it points to an important distinction: between historical memory which may be strongly naturalized and often used, but functions mainly as a past-defined reference point for contemporary discourses – on the one hand; and on the other hand – historical memory, which is used and experienced as an earlier stage of continuously ongoing social processes. In this sense, it is not a purely 'museum' memory, but an 'active' memory. From such a point of view, the comparison of Polish Solidarity to the struggle against apartheid in South Africa seems justified. Paradoxically, much more different from the Polish case, in this sense, are the cases of seemingly much closer anti-communist movements in other Eastern European countries.

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[10] Recently, such interpretations have been frequently voiced by Russian political elites. See for example Poljakova (2022).

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The interconnectedness of biographies, migration and gender norms

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Abstract

The aim of the paper is to reveal the relationship between biographies, migration, and gender norms among Hungarian live-in migrant care workers and show their interaction through a dynamic analysis. The study is based on empirical research conducted mainly in the sending country, Hungary. The analysis involved thirty-seven interviews carried out between 2016 and 2019. The interviews were undertaken using a combination of narrative and semi-structured interview techniques. I employed the method of biographical case reconstruction and thematic analysis. I observe the potential links and interactions between the biographies, migration, and gender norms of carers with the help of a typology based on demographic and biographical elements. The analysis demonstrates that family background and partnerships have important effects on work abroad and its perception, while working abroad can also shape gender norms. Interview analysis reveals a complex picture. While some migrant workers of various social backgrounds can rely on supportive families, members of non-egalitarian families experienced reinforced gender norms due to labor migration, and women can find themselves in an even more vulnerable situation at home.

Keywords: migrant care work; labor migration; biographical case reconstruction; gender norms; Hungary

1 Introduction[1]

The phenomenon of transnational care highlights several layers of social inequalities on a global and local level and raises questions about the regulation of immigration, employment, and gender-related issues in the migratory space. By now, a whole industry has been built around the transportation and employment of live-in migrant care workers around the world, including in Central and Eastern European countries. One of the economic im-

[1] I would like to thank the two anonymous reviewers for their valuable comments on the manuscript.

plications of the mobility of labor is that migrant carers are missing from the domestic labor market as they support their left-behind family members with remittances. At the same time, the cheap labor provided by migrant workers relieves the pressure on the social and health care system of the host country. Care migration from Hungary to Western European countries, mainly Austria and Germany, is increasingly widespread. Hungarian around-the-clock carers leave their homes to care for people abroad, while because of demographic aging, the demand for live-in care is also increasing in the sending country. While care migration is often depicted as a win-win situation for both sides, empirical analysis shows that inequalities are reproduced at different levels (Uhde & Ezzeddine, 2020).

In the following, I analyze different aspects of care migration with the method of biographical case reconstruction of narrative interviews (Rosenthal, 2018). I observe the potential links and interactions between the biographies, migration, and gender norms of carers with the help of a typology based on demographic and biographical elements. This method helps to demonstrate how these links and interactions can be interpreted sociologically. The novelty of the study can be identified in the dynamic analysis. I aim to show the embeddedness of migration within the life course and present how particular gender norms affect migration choices as life events and the life course itself. The goal of the paper is to contribute to gender-sensitive labor migration studies through the lens of care migration.

Previous sociological analysis that focused on the dynamics between biographies, migration, and gender norms has been carried out by Kovács and Melegh (Kovács & Melegh, 2004; Melegh & Kovács, 2010). Their method and research results contributed to the formation of my hypotheses, and their observations were also useful during the analysis. The paper undertakes an analysis of the interactions between biography, migration, and gender norms. I assumed that these three aspects are interconnected and affect each other in both directions. Regarding the connections between biography and labor migration, I intend to reveal how migration fits into the life course, what consequences it has for the latter, and what impacts the life course has on migration-related decisions. Regarding the links between biography and gender norms, I scrutinize how biography shapes gender values and the reverse. Concerning gender values and migration, I presumed that labor migration influences gender norms, just as gender expectations impact migration and, therefore, biography as well. Thus, gender norms have a dynamizing role.

2 Gender norms and the labor migration of women

In this paper, I use the following interpretation to define gender norms: Gender role attitudes are beliefs about the proper division of paid and unpaid labor, including domestic and care work between men and women (Walter, 2018). One of the pioneers in the field of family sociology was Frédéric Le Play, a French sociologist, who summarized his observations of twenty-five years in a book entitled *Les ouvriers européens* ('European workers') in 1855 (Mogey, 1955). The work of the Catholic and strongly conservative Le Play is significant mainly due to its methodological considerations, in which geographical environment was awarded a relevant role. Early ethnographic literature also discusses the subject of families. *Proper Peasants,* written by Fél and Hofer in 1969, attracted significant international interest (Fél & Hofer, 1969). The monograph analyses a traditional peasant society in

a Hungarian village and provides precious information about the role of each household member and the organization of work within the family. While the family head produced and provided for the needs of the household, the housewife was in charge of the property and maintained social ties. Thus, gender roles and duties were separated and precisely settled among men and women.

In recent decades, a frequently raised question within the migration literature has been if women's labor migration increases the autonomy and emancipation of women (Castles & Miller, 2003). Lutz states that the latter cannot occur when women leave for work abroad from patriarchic family arrangements and live and work on the periphery of the host country in a vulnerable situation in the labor market (Lutz, 2011). Turai claims that neither the daily tasks of carers nor their socio-demographic characteristics should frame the interpretation of their status; carers undertaking the same duties, regardless of their social status, might interpret their positions completely differently (Turai, 2018). Case studies demonstrate that the labor migration of women partners does not change essentially the division of household duties, except possibly during the time of her absence (Parreñas, 2001; Haidinger, 2008). Women with traditional gender norms may think about their roles after migration in the same way as before (Fedyuk, 2016, referring to the doctoral thesis of Volodko, 2011).

The analysis does not only seek to specify whether the emancipation of migrant women takes place. Instead, the paper offers an original contribution within the migration literature and starts a new debate by synthesizing the dimensions of gender norms, biographies, and labor migration as a life event. I assume that gender norms play a significant role in the life events of the individual, and the perception of migration can be explained according to these values.

3 Method

Based on experience with previous empirical research, I chose a qualitative method for the data collection process. I conducted thirty-seven in-depth interviews with thirty-one migrant care worker women, two migrant care worker men, and four left-behind partners between 2016 and 2019 (Table 1). The sociological fieldwork and the face-to-face interviews predominantly took place in Baranya County, Hungary, a region with disadvantageous economic indicators. Additionally, I conducted some interviews in Austria and Germany with care workers, where I had the chance to see their working environment. The fieldwork in the Hungarian countryside enabled me to obtain insights into the phenomenon's prevalence and to meet other players in the care market (such as intermediaries, managers of travel agencies, and locals). I selected the interviewees with the help of the snowball method. Regrettably, due to the illegality of their work, some potential respondents refused to participate in the research. I used a combination of narrative and semi-structured interview techniques. First, I asked the interviewees how they had become live-in care workers who worked abroad. Afterward, I asked specific questions about their employment history, labor migration, working conditions abroad, and family background, including care obligations and plans. All participants signed a consent form that gave me permission to use the information they shared for the purposes of the research.

Table 1 Basic demographic characteristics of care workers (n)

Age	
20–29	3
30–39	3
40–49	7
50–59	12
60–69	7
70+	1
Marital status	
married	13
in relationship	10
divorced	5
widow	3
single	2
Education	
primary school (8 years)	8
vocational school	7
maturity exam	10
college/BSc degree	7
MA degree	1

3.1 Biographical case reconstruction

The aim of the narrative interview is to let interviewees talk about their experiences in a long, uninterrupted narration about a specific topic (Rosenthal, 2018, pp. 133–134). In this way, the researcher can reconstruct action sequences and capture the complexity of relations between biographical elements. I analyzed the data using the method of biographical case reconstruction (Rosenthal, 2018, pp. 155–186). For reconstructing biographies, it is necessary to distinguish lived experiences from the narrative life history (Rosenthal, 1993; 2018). The method of case reconstruction does not employ previously determined categories but observes the whole interview in the context of the life history. Narrations of lived experiences are related to the present of the narration. The method assumes that past events in the narration do not exist in isolation in one's memory but are part of a coherent whole.

The first step in the analysis is determining the chronological order of events (Rosenthal, 2018, pp. 168–175). Afterward, the researcher takes into account all the options which were available to the biographer in a particular situation. The principle underlying se-

quential analysis is the assumption that each event consists of several potential choices in the life situation of the narrator. After defining the possible alternatives and hypotheses, the researcher observes the actual selection of the biographer. Biographies can be reconstructed with the help of hermeneutic interpretation. The method not only shows the embeddedness of migration in the life course, but I have made an attempt to connect decisions and interpretations associated with certain biographical events with the observation of gender norms.

Life course is an important aspect of the study. I assume that the current migration of individuals can be understood by looking at life events and situations from the past. Therefore, employing a historical perspective is inevitable in the analysis. Hareven finds that the life course approach reveals the interaction between demographic, structural, and cultural changes in individuals' family patterns (Hareven, 1994, p. 438). This perspective takes into consideration life and historical events and cultural heritage and assumes that they shape life experiences. In the analysis, I show that life history is strongly connected to agents and factors that structure migration.

3.2 Biographical typology

Based on the biographies of the interviewees, I created a typology that represents the foundation of the analysis. The typology does not contain the narrated life stories of the respondents but includes only biographical elements. The biographical typology can be considered a social status variable, although it helps us understand dynamics by including the dimension of time. It takes into account five aspects: the financial situation, employment history, agency, education, and age of the respondent. Financial situation contains three elements: debt, number of properties, and income of the household. Employment history refers to the continuity/fragmentation of employment before migration, where periods of unemployment, dismissals, frequent changes of jobs, bankruptcy, and the collapse of the industry are taken into account. According to de Haas, functionalist and historical-structural theories fail to grasp the complexity of migratory practices since they do not take into account individuals' agency – namely, their capacity to act, their curiosity, or their lifestyle choices (de Haas, 2014). In this typology, agency refers to the range of opportunities and the capability to act of individuals to sustain themselves and change their lives, with particular emphasis on finding a decent job in the locality. The research shows that all the respondents have agency; however, its level is very uneven. The education variable distinguishes three categories: primary education, matriculation, and higher education. Finally, I identified age as the fifth variable, as it was striking that care-related migration for those over 60 years of age fits into the life course in a different way to that of the younger generations.

Using these elements, five groups of respondents were created: 1) drifters, 2) partly drifters, 3) entrepreneurs, 4) overeducated, and 5) youth before starting a family. Although migration is part of the biography and not the most recent life event of the individual, the typology I created does not include current migration but only former elements. This consideration enables us to separate these two domains throughout the analysis.

Drifters. The group can be characterized by the most disadvantageous traits in all five dimensions. They live in general insecurity, their employment history is strongly fragmented, and they have experienced marginalization in the labor market throughout the years. Drifters are in a highly vulnerable position not only because of their employment history, poor financial status, and potential debt but also due to their lack of networks and difficulties accessing state benefits (see Standing, 2011). Therefore, they bear the traits of the precariat. Their agency is limited in terms of their ability to find a job in their vicinity, and they cannot sustain themselves or their families if they stay at home. They are middle-aged or over 65, and almost all of them had finished elementary school at most.

Partly drifters. The second group has similar traits to the previous one, with the exception that people who belong here are in a slightly better situation in terms of security in life. Partly drifters have a better financial situation, many of them talk about their continuous employment history in Hungary, and their education level might include matriculation. The group is diverse concerning agency, while their age is similar to that of the *drifters*.

Entrepreneurs. Entrepreneurs have a fragmented employment history in Hungary; they have had to change jobs relatively frequently, but they adapted well to market conditions. Even though some had a successful business before becoming involved in migrant care work, labor market pressure made them give up their business. They have an average or above-average financial background; they are highly mobile (either downwards or upwards), and due to their risk-taking attitude, skills, and connections, they have a high level of agency. They have room to maneuver thanks to their resources and could do various kinds of jobs in Hungary if they wanted to. Entrepreneurs have the lowest level of education compared to members of the other groups.

Overeducated. Although none of the respondents with a college/university degree worked abroad in line with their original qualifications, the life circumstances of the overeducated are significantly more advantageous than those of the others. Their course of employment is continuous in Hungary. They had a stable financial situation even before migration; therefore, working abroad is not a constraint for them but rather a kind of experiment that might involve self-fulfillment. Their agency is the highest among all the groups. They could find a job easily in the sending country.

Youth before starting a family. The fifth group includes respondents in their twenties or early thirties whose mobility in the future is possible and who are trying to settle down both in terms of personal life and work. Their financial situation is unfavorable, and they do not have savings. While some of them still live with their parents, others have to sustain themselves from a very early age due to complicated family situations. All of them have labor market experience in the sending country, where their employment has not been continuous. The members of this group have limited agency since they face difficulty commuting to bigger towns from their localities, or their low wages do not allow them to live a decent life. They are pushed abroad due to limited job opportunities, and sometimes this decision is embedded in family patterns of care migration. Their education ranges from primary school level to college degree.

4 Effects of migration on gender norms within the life history

Quantitative research reveals that men and women have different perceptions of the time they spend on domestic and care work. Data from the Generations and Gender Survey panel survey show that both men and women overestimate their contribution to childcare compared to the other sex (Murinkó, 2014, p. 190). Therefore, it is difficult to determine the actual amount of time spent on these duties by gender. Domestic and care work is only one of the aspects of household dynamics. In the following, I observe the consequences of labor migration on gender norms within the households and scrutinize the potential patterns compared to the period prior to migration (Table 2).

Table 2: Effect of migration on gender norms in biographical frame

	Egalitarian-traditional	**Traditional**	**Individualistic**	**Individualistic-egalitarian**	**Traditional-individualistic**
Drifters	does not change	intensifies	intensifies		
Partly drifters	does not change	intensifies	intensifies	does not change	
Entrepreneurs	does not change			intensifies	intensifies
Overeducated			does not change	does not change/ intensifies	
Youth		does not change/ not known			

Source: author's own compilation. Empty spaces mean that no case was identified among the interviewees.

Methodologically, it is interesting to examine cases when both members of a couple were interviewed. Partners not only complete the picture with relevant biographical elements, but they provide information on relationships within the family or raise topics that their partner hid intentionally or non-intentionally. Interviews with partners also shed light on the responsibilities of husbands (e.g., managing the household and raising and caring for children before or during the labor migration of their wives). Empirical evidence highlights that some women tolerate having lazy and unmotivated husbands or children, and these attitudes do not change at all during labor migration, while the values of others might shift (Gábriel, 2019).

Concerning gendered norms, I distinguished five categories based on the narrations and personal stories of respondents. These are the following: egalitarian-traditional, traditional, individualistic, individualistic-egalitarian, and traditional-individualistic values.[2]

[2] 'Egalitarian values' refers to the belief that men and women should do equal shares of household chores and that women should participate in paid work, just like men (Walter, 2018). 'Traditional values' means a belief in the unequal social roles of men and women, such as that care and domestic work are the responsibility of women, while the duty of breadwinning is men's. I identified individualistic values among those who emphasized their independence, and mutuality was lacking in their narrations.

Although opinions and practices might be mixed among the respondents, specific values are more dominant than others.

There are various constellations of these gendered values among migrant care workers (see Table 3). Table 3 is an alternative to Table 2, in which the dynamics of interactions are more detailed. The section presents six categories, namely, 1) family unity in migration, 2) fragmented family life, 3) reinforced individualistic gender values, 4) fixed gender values, 5) experiencing agency in migration, and 6) unclear gender values. These categories illustrate patterns through which the interactions of gendered norms and care migration can be interpreted.

Table 3 Types of gender values associated with migration, biographical frame

	Egalitarian-traditional	**Traditional**	**Individualistic**	**Individualistic-egalitarian**	**Traditional-individualistic**
Drifters	Family unity in migration	Fragmented family life	Reinforced gender values		
Partly drifters	Family unity in migration	Fragmented family life	Reinforced gender values	Experiencing agency	
Entrepreneurs	Family unity / Fixed gender values			Reinforced individualistic gender values	Fragmented family life
Overeducated			Reinforced gender values/ Experiencing agency	Experiencing agency	
Youth		Unclear gender values			

Source: author's own compilation. Empty spaces mean that no case was identified among the interviewees.

4.1 Family unity in labor migration

Within the group of *drifters, partly drifters and entrepreneurs*, we can identify a combination of egalitarian and traditional gender values. Among interviewees whose gender norms contain elements of egalitarianism, labor migration is understood as a family strategy. In these cases, partners show a mutually supportive, cohesive, and sometimes a kind of 'sticking-together' behavior. This phenomenon confirms the sociological finding that groups with lower social status are exclusively each other's resources (see Tóth et al., 2017). One of the important claims of the present paper is that within households where egalitarian values are present, gender norms do not change due to migration, even if traditional values are also present.

Family unity is represented in the case of a family living in a village of 2,100 inhabitants. The latter had to close their pub, a local business, after 23 years, due to the deteriorat-

ing health of the husband. After a few unsuccessful attempts to find work in the Hungarian labor market, the wife left for Germany to undertake care work while the condition of her husband deteriorated. Still, the couple fought together to sustain their livelihood. The wife regards herself and her husband as a loving couple who can balance the situation and fight for each other. Thus, the main reason for migration is an earlier event that affected both the household economy and the life course of the members.

> But I would not betray him. He did not betray me either; our life is not about this. That is why I left. Because physically, after his heart surgery, how to say, after his heart surgery, he wanted to [work] in vain, [but] he could not have worked. He tried it in vain; it did not work out. And I had to realize that there was nothing else [I could do]… (57-year-old Hungarian care worker)

Based on the above, while engagement in daily domestic tasks might shift the gendered division of work within the household, care migration does not change gender norms significantly if egalitarian values predominate. This permanency of values can be explained by family dynamics and economic factors. On the one hand, as such cases show, women may go abroad leaving a stable relationship and supportive family. The decision to migrate to work can be interpreted as fitting with a strong pre-existing family system, where migration does not cause a break within the family but instead reinforces the responsibility and commitment of members towards each other. In this case, the stable and caring family background made the distance bearable for the commuting woman and stay-at-home partner. On the other hand, labor migration was induced by economic difficulties, debt, insecurity in life, and worsening health conditions; thus, working abroad becomes a household-economic solution (Sik, 1989).

4.2 Fragmented family life and migration

As a counterpoint to *family unity*, another pattern called *fragmented family life* may unfold. This pattern is also closely connected to migration and gender values. Disunity was observed within households with strong traditional gender values, a lower social class, and where the employment history was fragmented. In my sample, this was identified among the *drifters, partly drifters* and *entrepreneurs*. The image of a caring mother and wife maintaining the household was particularly strong, while self-sacrifice and self-exploitation motifs were also perceived in their narratives.

Women with fragmented family lives talk about their husbands with disappointment and pity. Their stories imply that the women are not equal partners in the relationship, but they rather function as service providers in the household. This experience is constant and does not change over time. 'Together with my husband? I did, I did [everything…] He wasn't really good at anything, but when he [got] ill, nothing, nothing' – stated the 74-year-old woman haltingly, who had left for Austria to undertake care work at the age of 63. These problematic, sometimes degrading relationships do not cease to exist even after several decades of marriage. This highlights the limited agency of these women, whose independence is hindered not only because of economic reasons but due to their own limitations.

A fragmented family life can go hand in hand with the exploitation of women by male family members. One of the interviewees described her complicated family situation, involving men taking advantage of her. Her adult, capable son is unwilling to work. Therefore, she has to support him; her abusive son-in-law demands money from her for various expenses; and her ex-husband stayed in her house for years after their divorce. Avoiding conflict leads to a situation of vulnerability, which becomes even more acute in relation to labor migration. This vulnerability is enhanced further by the distribution of remittances. Thus, altruistic, self-denying norms might be strengthened due to migration for work, and negative experiences with men also become stronger.

The empirical research shows that the predominantly traditional gender values and ambivalent attitudes to men of some women might be intensified due to labor migration. In the group of people with unfavorable biographical elements and traditional gendered values, migration did not boost women's emancipatory aspirations; rather, it reinforced previous norms. This can be interpreted as an emancipatory trap, which phenomenon is also identified in the case of immigrant women described in FEMAGE research (Melegh & Kovács, 2010). Based on the latter's results, the expectations of migrant women are not necessarily fulfilled, leading to disappointment and isolation. The analysis demonstrated that in most cases, the family forms a close economic unit, but the interests of individuals are relegated to the background due to the interests of the family (see Szelényi, 2016).

4.3 Reinforced individualistic gender values

Predominantly individualistic gender values were identified among certain respondents. The latter are typically childless women in their late forties and can be found in each group except for *youth*. Sometimes migration shapes and intensifies these values.

One of the live-in care workers among the *partly drifters* explains that her partner, who is away every week for work, does not really appreciate that she also works abroad. Although she works in Austria because of financial considerations, not for adventure, her partner regularly expresses his social expectations and judgments:

> He was not happy about it because he only saw that I would not be at home […] he is a truck driver, so I do not understand how it came up [the question] why I am not at home. Isn't it all the same whether I am in Austria or at home if he is abroad anyway, as he is on the road from Monday to Friday? […] he yells at me, about why I am [going to] Austria and why he has to be alone. But then, then he is reconciled; he does not agree, of course, but he does not bleed, but he always [says] 'See, again, I have to walk like a single idiot.' I say, 'Well, I am sorry.' So, that's it. He can handle it. (45-year-old Hungarian care worker)

This respondent sticks to her opinions and does not let her partner influence her in her personal decisions. However, with the help of migration as a life event, the care worker is able to justify – regardless of her relationship – that she is an independent woman with agency.

Women whose narrations about migration are marked by strong individualistic values not only seem to be more autonomous but also often renegotiate their gendered

expectations. In their narratives, they return to important life situations, such as their failure in relationships or their childlessness, and they explain the act of migration partly according to these circumstances.

4.4 Fixed gender values and migration

Entrepreneurs have mainly egalitarian norms which do not change, except in exceptional cases. In most cases, we see that gender values are stable among the members of this group due to their stable family backgrounds, and these attitudes remain the same after migration.

One of the care workers came from a prosperous Swabian village located in Baranya County. The woman's labor migration is not induced by economic or family crises; the money she earns abroad is spent on welfare services and renovating a guest house in Hungary. The woman explained that her son started to commute to Austria while she was working there as a live-in care worker. This situation was challenging for her husband; however, according to the woman's narration, her husband has always contributed to the household chores. Despite the egalitarian and cooperative attitude of her husband, she has always tried to bring some relief to him by doing her share of the domestic work.

> My other son went to Austria as a car mechanic; he came home only for the weekends, every weekend. It was bad that I was not at home, and his father had to do the laundry and cook for the child on the weekdays while he was abroad. It was very difficult that he arrived on Friday evening, and all his clothes had to be ready for Sunday. […] [But my husband] undertook [this responsibility]. He said the children should not realize I was not at home. (56-year-old Hungarian care worker)

Labor migration among *entrepreneurs* is not due to pressure or constraints but rather involves a temporary period of 'investment' and enables the household to purchase welfare services. This is why while labor migration has an effect on the division of gendered work, it does not necessarily lead to a shift in established values. Nevertheless, it demonstrates that a stable family background and the motivation for migration can be connected with the degree of changes in gender values.

4.5 Experiencing agency in migration

If a woman considers herself to be independent and capable of realizing her plans, it is inevitable that some decisions will be made without a partner. Labor migration can be one such decision. Krisztina Németh finds that migrant care work is one of the means of self-fulfillment (Németh, 2018). In her case study, one of the respondents constructs her narrative around the themes of professional development and self-fulfillment. The analysis highlights that the root of the narration can be found in biographical elements, in the competences of the care worker(s), and in seizing opportunities to work successfully. 'The background of her work [which she] perceived as self-fulfilling was a stable and emotion-

ally supportive family environment, in which gender roles were flexible from the beginning' (Németh, 2018, p. 120) – as we read about a married woman who was in stable employment before migrating for work. These biographical events are just as important in understanding respondents' narrations as attitudes toward such work.

While the experience of agency can be observed in each group at a certain level, it is more articulated in the group of *overeducated* and *partly drifters*. They talk about their migration in an active way, and their autonomy is emphasized.

The case of a young interviewee demonstrates that migration as a life event is able to activate changes in some attitudes and intensify the demand for independence from men. Migration had clearly improved the self-esteem of one carer in her early thirties, who explained that her work in Austria meant she had achieved her goals without any help or intervention. She had changed her career path within a few years, and after being employed as a domestic worker, she became an entrepreneur in the host country.

> Maybe it sounds stupid, but I consider myself to be much stronger than him [her husband]. Mentally and overall. Obviously, not physically, but I can handle obstacles much better. It would have been too much for him. […] I speak German; I am the one who is a survivor […]. (33-year-old Hungarian care worker)

While this respondent wants to be seen as a family-oriented, caring mother and wife, the image of a strong woman plays an important role in her self-presentation. As her agency was reinforced by starting a job in Austria, the contrast between her and her husband strengthened. The success she experienced in her labor migration motivated the woman to take on more challenges. It became possible for her to stop working as a carer and have a first child in Austria. Obtaining positive feedback abroad (a manifestation of agency) can amplify emancipatory aspirations and reinforce gender values among women.

The self-presentation of another respondent implies a stubborn, self-centered personality, as manifested in her relationship with her husband and son. This respondent was incited by tension at her office to change her job, but her son also started university at this point, meaning that the expenses of the family increased suddenly.

> Care worker: […] I called my husband and told him, 'Hi, I have decided to go to Austria to work, I called this woman, and I will start next Thursday.'
>
> Interviewer: What did he say?
>
> Care worker: [laughs] Well, he said, 'it does not work like that; if I arrive home, we will talk.' But I had already decided. He arrived home, and he was yelling. […] I went, the whole family was there because we are a cohesive family; my mom, my dad, my brother, and I received the 'blessing' that 'You are not normal, would you leave your family behind?!' and 'Do you think that you decide this by yourself and you can drop everything?!' I am not a crybaby, but it hurt me a lot. But I thought that I had started, so I would go through with it.

The possibility of confrontation plays an important role in women's evaluations of their situation. The decision described above might have been unexpected for the husband, but the respondent claims that she had room to maneuver and a chance to confront him.

Involving biographical elements regarding migration and gender norms, it can be concluded that the experience of agency and migration as self-fulfilling is present among

respondents with stable economic and supportive family backgrounds. These conditions are necessary for active participation rather than victimhood to dominate the stories about migration.

4.6 Unclear gender values

The literature reveals that egalitarian values are more widespread among younger people than older ones (Lynott & McCandless, 2000; Berridge et al., 2009). However, in Hungary, data show that younger people tend to think in a more conservative way than older generations (Gregor, 2016). The younger respondents in my research deserve attention for two reasons. On the one hand, due to their age, their presence in the eldercare sector is rare. On the other hand, within their own cohort (among labor migrant peers), their choice of occupation is atypical. In my empirical research, *youth before starting a family* are a select group who differ from other groups regarding their life course: they are at the beginning of their professional lives, and their life course is undetermined.

Social and demographic factors such as educational level also influence gender roles. A lower-level education can be associated with traditional values (Bryant, 2003). The members of the *youth* group had various educational backgrounds and typically came from small villages. While some appeared to have rather traditional or mixed beliefs about gender, it was difficult to tell the attitudes of the others. The relatively short life experience of members of this group contributed to the lack of information in this regard. In contrast to older respondents, who rarely hid partnership-related details, these youth were more secretive about their relationship goals or daily routines. This may be because they may not have lived with a partner yet.

Youth care workers do not regard their work in Austria as a means of self-fulfillment, but they emphasize the significance of predictability and the salary they earn abroad. The partners of the youth interviewees did not plan to engage in labor abroad. This does not cause tension in their relationships since online platforms enable them to communicate on a daily basis, and due to working in shifts, they can meet every second week.

One 25-year-old woman respondent came from a small village. After a few attempts at holding down a job in the Hungarian labor market, she started working as a live-in care worker. Her gender norms are rather traditional and do not appear to have changed due to migration. She divides domestic work into male and female duties and feels strong care-related obligations towards her parents.

> [In response to the question 'Who will look after your parents in their old age?'] Well, me. [laughs] It is so simple. I think that it is obvious. I do not want to put them in a care home because it is not nice. If I am healthy, well, I would like to take care of them, definitely. (25-year-old Hungarian care worker)

In certain cases, fieldwork enabled us to obtain insight into the background of the stories of both younger and older respondents; at the same time, many questions remained open. Motivations, gender norms, and the consequences of working abroad on the later family lives of young live-in care workers would be worth further study.

5 Discussion and conclusions

The aim of the paper was to present the interconnectedness of biographies, migration and gender norms through dynamic analysis. I found it important to prove that migration-related decisions should be examined from a much earlier point than respondents' first thoughts about migration. First, I created a typology based on the biographical elements and demographic characteristics of the respondents. The typology contained five categories (*drifters*, *partly drifters*, *entrepreneurs*, *overeducated,* and *youth before starting a family*) and was applied throughout the analysis. Then, I identified the interactions between the three dimensions and found different patterns among care workers and their partners. The six types of interaction where gender values and migration as a life event were taken into account were the following: 1) family unity in migration, 2) fragmented family life, 3) reinforced individualistic gender norms, 4) fixed gender values, 5) experiencing agency in migration, and 6) unclear gender values.

Family unity in migration refers to individuals with stable partnerships and caring family backgrounds, especially when they start working abroad as care workers. Family ties remain supportive later on; these respondents' labor migration does not damage family cohesion but strengthens partners' commitment to each other. We saw this pattern among *drifters*, *partly drifters,* and *entrepreneurs*. The second type, called *fragmented family life,* was identified within the same groups. Based on the interviews, we saw that care migration could deepen traditional gender norms within the household, and the agency of the migrant women could remain limited. The analysis confirmed that gender norms and constraints in migration are related. *Reinforced individualistic gender values* occurred among childless women in their forties who belonged to the group of *drifters, partly drifters, overeducated,* and *entrepreneurs*. These women gained self-confidence from their migration and did not expect support or help from men. *Fixed gender values* were found among the *entrepreneurs*. In this case, migration did not influence gender norms, and gender values did not shape migration either, which implies that a stable family background can fix pre-existing gender norms, just as we saw with *family unity in migration*. *Overeducated* care workers might *experience agency* abroad, suggesting that labor migration can evoke changes in values and strengthen the demand for independence from men. Women with a higher-level education who are supported emotionally in their relationships might experience their migration as self-fulfilling. The analysis showed that care workers with agency narrate the story of their migration more actively. Thus, gender attitudes and migration affect each other in both directions. Since *youth before starting a family* did not include in their narrations gender-related beliefs, opinions, or experiences (or only rarely), connections between gender norms and migration are difficult to identify. However, care migration as a response to difficulties in life might hinder them from having career or family aspirations.

The analysis described in this paper attempted to employ a method that exceeds regular two-dimensional qualitative analysis and instead involves the dynamic examination of a complex phenomenon. The main argument of the study is that biography, migration, and gender norms mobilize each other, and these three elements cannot be separated if we would like to understand what leads to labor migration under very different circumstances and at differing life stages. The analysis showed that the traditional gender values of

some women may be reinforced, and due to migration, they could find themselves in an even more vulnerable situation at home. As some of the examples showed, care workers are exposed to different kinds of threats and forms of exploitation financially and within their family relationships. It is also important to mention that self-confidence obtained through migration might influence decisions about the future that do not involve men. The biographical perspective draws attention to the role of agency in the context of migration and gender values. I have also demonstrated that women with partners and a higher level of education might perceive migration as a form of self-fulfillment and have a freer self-presentation than their fellow care workers.

Briefly, I would like to reflect here on potential critiques of the method and the theoretical approach of the research. The combination of narratives and semi-structured interviews was considered appropriate for use in the research, enabling respondents to unfold their life histories in detail, while the interviewer obtained rich data from the narrations. However, the method of biographical case reconstruction is a rather time-consuming analytical tool that requires meticulous work. Therefore, it is neither widespread nor frequently applied. One of the key elements of the analysis was the deployment of gender values in the examination. Interviews show that kinship relations have a crucial effect on the realization and perceptions of migration. This is a central and novel observation, as it makes clear how gender norms can dynamize the decisive life events of individuals. We also saw that life events affect gender norms in migration as well, thus, the interaction works in reverse. In certain cases, it could clearly be seen that care migration increased the vulnerability of women within the family.

The growing scarcity of care is an unsolved social problem, both globally and in Central and Eastern European societies. The aging of societies, low fertility rates, the decline of intergenerational family care, the outsourcing of these duties, and labor market constraints are increasing the demand for care and creating burdens. The phenomenon discussed in the study highlights that even though care workers may only cross a single border, their movement is part of an unequal global order, and their positions are framed by hierarchic relations.

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A qualitative exploration of the socioeconomic status and motivations of Chinese students in Hungary

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Abstract

Surprisingly little research has been conducted on Chinese students in Hungary, despite their growing number. Education has gradually become a crucial element in attaining higher socioeconomic status, so it is vital to understand such students' socioeconomic backgrounds and motivation for studying in Central Eastern Europe. Applying cultural mobility theory, this article explores students' family backgrounds and motivations for pursuing tertiary education in Hungary. Twenty-six narrative interviews were conducted and analysed using grounded theory method. The results indicate that three important factors influenced lower-middle-class Chinese students' choices to study in Hungary: the constraints of reality, educational aspirations, and a desire for self-expression. Working-class or lower-middle-class families were required to make compromises for their children to study abroad because their financial means limited the opportunity for international study. Therefore, education in a relatively low-cost country like Hungary became an option. This research contributes to current theories of educational mobility by offering fresh understandings about students with a lower-middle class SES, the influx of working-class Chinese students into Hungary, as well as the relationship between upward social mobility and studying internationally. The recommendations for policymakers in China and Hungary made in this paper enable the development of practicable strategies for enhancing learning environments, producing positive educational outcomes, fostering equitable education systems, and ameliorating the impact of a lower SES background on educational and social mobility.

Keywords: Chinese students; Hungary; socioeconomic status; motivation; qualitative research

1 Introduction

The relationship between China and Central and Eastern European (CEE) countries, including Hungary, was not well developed until approximately ten years ago. Since 2011, the Chinese-CEE relationship started to intensify with the Belt and Road Initiative (BRI), which wrote a new chapter in their relations and in which both parties lost traditional

trade partners and perceived opportunities for economic growth through cooperation (Turcsányi et al., 2019). Chen and Ugrósdy (2019) stated that China and Hungary increased their bilateral cooperation after signing the 17+1 Cooperation Initiative.

In the two decades between 1998 and 2019, the number of international students enrolling in degree programmes outside their home countries rose from 1.95 million to 7.03 million worldwide. Thus, the number of Chinese students engaged in studies abroad rapidly increased by 720 per cent globally, making China the largest country of origin for international students worldwide, and this significantly influenced global higher education (Education in China, 2021).

The main target locations of Chinese students are Anglo-Saxon countries and more economically developed ones (i.e., Japan and South Korea). Similar patterns can also be observed in Germany, where the number of Chinese students has grown rapidly, but the requirement of being able to speak German of several universities has limited this growth (Studying in Germany, n. d.). Although Hungary has a relatively small number of Chinese students compared to English-speaking countries, and there was a very small number of Chinese students at Hungarian universities before 2013, they are now the fastest-growing group of international students. For this reason, the CEE countries, including Hungary, receive relatively large numbers of Chinese students, and it is mostly the English-language programmes that attract them. Their number rose by 73 per cent in 2019 compared to in 2014 (Hungarian Central Statistical Office, 2020), as can be seen in Figure 1.

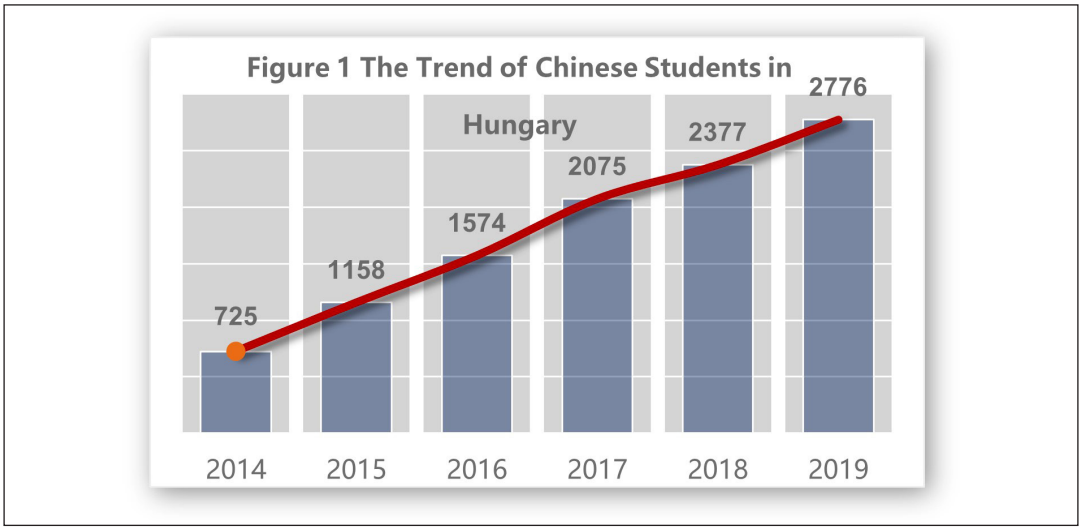

Figure 1 Number of Chinese Students in Hungary

Source: Hungarian Statistical Office (2020)

Chinese students constituted Hungary's second-largest international student population (after Germans) in 2019 and the largest group of non-European international students in Hungary (Hungarian Central Statistical Office, 2020). Education is a crucial element in

attaining higher socioeconomic status (Zhu, 2020), and it is vital to understand the socioeconomic status of the significant numbers of Chinese students in Hungary since this influences their learning outcomes, as do the kinds of economic, social, and cultural capital they possess. Knowing this, policymakers at the institutional and governmental levels could adopt useful strategies for enhancing learning environments, producing positive educational outcomes, fostering equitable education systems, and ameliorating the impact of SES on educational attainment and mobility. Moreover, it is also essential to reveal what motivates Chinese students to choose Hungary as a place to pursue their studies because Hungary was not always a typical target country for international student mobility, especially not from China.

Based on narrative interviews with 26 Chinese students in Hungary, this article examines the social, economic, and cultural capital of the group. It also aims to uncover the major motivational factors which cause Chinese students to choose Hungary. The first part of the article outlines cultural mobility theory as a theoretical framework and is followed by a detailed presentation of the data collection process and analysis. The findings and discussion reveal that the majority of Chinese students in Hungary have a working and lower-middle class background that influenced their choice of country. Ultimately, this empirical investigation illustrates that Chinese students often compromise by studying in Hungary, as Anglo-Saxon and Western countries are unaffordable. The choice of Hungary is thus a pragmatic one, and it is not a dream destination.

This article contributes to theories of cultural mobility because it provides new understandings of the trajectories of lower-middle socioeconomic status students. The study finds that migration to Hungary involves upwardly mobile individuals through the Hungarian education. This study offers insights for policymakers in China and higher education institutions in Hungary and its immediate vicinity, not least by increasing understanding of the different social statuses of students and how to promote equal opportunities in education and society to improve educational attainment.

2 Theoretical framework: Cultural mobility

The number of students studying abroad is steadily growing, and this contributes to the internationalisation of universities – a process that, by necessity, involves sociocultural adaptation and accumulation (Savicki, 2008). This phenomenon needs to be investigated in depth. With globalisation and knowledge proliferating across the world, international educational mobility is regarded as an effective means of increasing intercultural understanding and cultural accumulation (Messelink et al., 2015). There is a debate between proponents of cultural reproduction (CR) and cultural mobility (CM) theories (Blaskó, 2003; Breen et al., 2009; Zhu, 2020). Breen et al. (2009) demonstrated that more privileged students have greater cultural capital that can be transformed into educational gains; hence, cultural capital is viewed as a mediator between educational achievements and origin (Bourdieu & Wacquant, 1992). In contrast, CM asserts that underprivileged students are more likely to benefit from cultural capital that compensates for their disadvantages (DiMaggio, 1982; Harvey et al., 2016).

2.1 Cultural reproduction

International educational mobility has risen among (upper)-middle-class students. Regarding the phenomenon of cultural reproduction, Bourdieu & Wacquant (1992) argue that parents from the upper-middle classes support their children by ensuring that they receive the most prestigious education, and in contemporary societies, international education contributes to cultural reproduction in these families. Thøgersen (2016) also indicated that middle-class families send their offspring to Western Europe to obtain higher cultural capital, even though a Western education does not always pay off economically.

Education has been seen as a top priority by Chinese families. Many people in China regard educational resources as an instrument for changing their lives and climbing ever higher on the social ladder. Most Chinese parents believe that better education will contribute to their children's professional status and give them more opportunities to get a decent job with higher socioeconomic status (Wang et al., 2014). Following Bourdieu's analysis, Lee (2011), Waters et al. (2011), and Xiang and Shen (2009) highlighted that students with a well-educated family background reproduce their class advantage. Wang (2021) undertook Bourdieusian analysis of the middle-high sociocultural capital of Chinese international graduates who study in the United States and concluded that parents put effort into their child(ren)'s educational attainment.

2.2 Cultural mobility

Cultural mobility theory was proposed by DiMaggio (1982), who argued that parents in the lower-middle class adopt the same strategy, making efforts to pursue a similar approach to accumulating cultural capital through schooling, as well as encouraging their children's educational success in order to achieve upward mobility. Several other scholars have arrived at similar conclusions (Daloz, 2013; Harvey et al., 2016; Lü, 2015; Wong et al., 2015). The emphasis on the importance of education in poverty alleviation indicates its relevance for helping low and middle-lower socioeconomic status (SES) families escape the vicious poverty cycle.

For people of low and middle-lower socio-economic backgrounds, schooling is a means of achieving their ambition for social mobility (Boyden, 2013; Kalmijn & Kraaykamp, 1996). Parents from working-class backgrounds may adopt strategies similar to those of the middle classes, supporting their children to achieve educational success through parental effort (Devine, 2004). In particular, people from a principally working-class background push themselves to acquire skills, thus leading to educational success (Goldthorpe, 2007). Since working-class families consider postsecondary and higher education to be a risky use of their resources, they desire greater certainty about educational success when they invest in higher education (Lynch & O'Riordan, 1998).

An equal distribution of cultural capital in the population would lead to lower educational inequality. Therefore, cultural mobility should be promoted across social classes and benefit students who are from disadvantaged families. Crul et al. (2017) concluded that immigrants with poor education may become steeply upwardly mobile by studying how they can overcome obstacles through education. Meng (2020) pointed out that the modern-

isation of China has resulted in growing competition for a good education, in combination with the global trend of 'intensive mothering', which has led to increased attention on education among Chinese parents, especially mothers. At the same time, educational attainment is socially structured; middle-class families fight to prevent their children from dropping out of relatively advantageous positions in society, while working-class parents, perceiving the significance of education equally, are more realistic but also invest heavily in their children's education.

Promoting educational equity is one of the main ways for the Chinese government to secure low and middle-lower-SES students' academic paths. By this means, scholarship-based support by the government that contributes to the success in international mobility could lead to a more successful career trajectory; and eventually, it could potentially create greater economic prosperity for the nation (Chui, 2013). In addition, Chinese students are influenced by China's ancient Confucian tradition of seeing education as a fundamental cultural value (Woronov, 2015). Lee (2014) also argued that immigration policy reduces the poverty rate and increases the cultural capital of the second generation.

There is evidence that working class parents have high expectations about their children's higher education, although they lack economic, cultural, and social capital (Kipnis, 2011; Sheng, 2014). Khattab (2015) explained that cultural capital is a result of aspirations, expectations, and achievements in child-rearing practices, whereby members of the dominant class acclimatise their children to a particular work ethic and orientation towards education and employment, as manifested in their aspirations, expectations, and achievements. Parents in a worse economic situation and with less cultural capital will find it more difficult to support their children to develop a different and better social and economic destiny than their own.

A growing number of lower-middle-income families support their children's studies abroad, following the rules of the global education hierarchy. Chen and Ross (2015) demonstrated that Chinese students' beliefs in a global education hierarchy are reflected in their choice of universities and majors, as well as their perceptions of academic quality. Lörz et al. (2016) differentiated students' motivations for pursuing education abroad at various phases of the life stage. For instance, some students who would like to study abroad might avoid it because they lack financial support, have poor language skills, or low self-esteem.

2.3 The Bologna Process and educational mobility with respect to Hungary

Internationalisation activities in many European nations are dependent on the higher education institutions themselves and the policies and plans of the central government. The Bologna declaration of 1999 was designed to create comparable degrees across the forty-eight countries that signed up to the related policy and practice changes under the European Higher Education Area (EHEA) umbrella. In 2012, countries in the EHEA established and implemented international educational mobility initiatives.

Additionally, the European Commission's (2017) 'Strengthening European Identity through Education and Culture' initiative aims to increase educational mobility and improve cross-border collaboration. Several countries in Europe reported that strategically addressing students' incoming mobility on the national level had enhanced their overall

student population. Eleven European countries reported that their entire higher education system is associated with an internationalisation educational mobility plan (European Commission, 2017). In this regard, the Hungarian Parliament adopted a new Act amending the 2011 Higher Education Act. The amendments added new requirements regarding the names of foreign higher education institutions, the requirement for bilateral agreements between Hungary and the foreign higher education institution's non-European Economic Area (EEA) country of origin, the provision of higher education services in the country of origin, as well as additional registration requirements (European Commission, 2018).

Students from different socioeconomic backgrounds attend different types of institutions and courses with varying modes of study. Students from the working class are over-represented in lower-prestige courses that predominantly result in unclear professional outcomes (Fehérvári et al., 2016; Nyüsti, 2018). Some of the Chinese students who study in Hungary are regarded as disadvantaged in terms of cultural capital, although there is little literature regarding the situation in Central and Eastern European countries (Li, 2020). Hungary aims to attract more Chinese students and supports around 500 per year with the *Stipendium Hungaricum*, which attracts international students by implementing multilateral agreements for international students to study in Hungary that cover their tuition fees and funding housing/living costs. Additionally, there is a growing number of fee-paying Chinese students.

Li and Primecz (2021) suggested that Chinese students studying in Hungary contribute to the development of beneficial networks between Hungary and China. Hungary, a non-English speaking nation, is seeing an increase in Chinese students for a variety of reasons: (1) the *Stipendium Hungaricum* scholarship promotes proficiency in both English and Hungarian, a critical component of international educational mobility; (2) the majority of Hungarian educational institutions offer language-training programmes to assist international students who do not meet language requirements to begin their academic studies and thus provide a 'bridge', with particular emphasis on incoming Chinese students, in relation to becoming acquainted with the necessary academic skills and adjusting to the local culture; (3) the Hungarian education platform promotes academic mobility to other European regions and the entire world through programmes such as the CEMS Master's in International Management (CEMS Global Alliance). Little research has hitherto attempted to determine the SES of Chinese students in Hungary. This study addresses the following questions: (1) What is the socioeconomic status of Chinese students in Hungary? (2) What economic, social, and cultural capital do they possess? And (3) what are their primary motivations for choosing Hungary?

3 Methodology and data

The research questions necessitated a qualitative methodology. Consequently, semi-structured narrative interviews were conducted with twenty-six Chinese students studying in Hungary. This was augmented by observation before and after the interviews, which was noted in a research diary. Following the guidelines for narrative interviews, life stories were collected about the respondents' experiences in Hungary (Kvale, 1996; Rosile et al., 2013). The interview covered events and considerations before arrival, including formative education; previous higher education (if any); the motivation for moving to Hungary to

study; and the interviewees' experiences and plans for after they complete their studies. This article, however, focuses on the first part – namely, their family backgrounds and their motivations for studying in Hungary.

A purposive sampling method was applied to create the most reliable sample. The sampling procedure aimed to ensure maximum variation among the interviewees (cf. Horváth & Mitev, 2015). The first author, a Chinese doctoral student in Hungary, contacted Chinese students at different universities in Budapest and other university towns in Hungary (Pécs, Debrecen, and Szeged) and asked her contacts to introduce her to Chinese students at the chosen university. Most of the interviewees were not in personal contact with the interviewer before the phase of data collection, but the first author could relate to the experiences of her new contacts relatively easily. Thereafter, semi-structured face-to-face narrative interviews were conducted by the first author in Mandarin. The participants' demographic information can be seen in Table 1:

Table 1 Participants' demographic information

Variables	**Overall Sample (N=26)**	
	N	**%**
Gender		
Male	14	54%
Female	12	46%
Education Level		
Bachelor	13	50%
Master	9	35%
Ph.D.	4	15%
Study location		
Budapest area	10	38%
Non-Budapest area	16	62%
Major		
Humanities	9	35%
Science	9	35%
Medical field	8	30%
Financial Sources		
Tuition fee-paying	15	58%
Stipendium Hungaricum Scholarship	11	42%
Age		
Average age	23.8	/
Max value (year)	29	/
Min value (year)	17	/

Respondents gave informed consent before the interview, and all interviews were recorded with their permission. They lasted 60–90 minutes and were conducted at the end of November 2019. The interviewer visited the interviewees at their homes, in a quiet café, or in study rooms in dormitories. The audio data were converted to written transcripts in Chinese, and NVivo 9 software was used to assist with data analysis by coding categories.

The author adapted elements of the grounded theory (GT) approach for the data analysis, as summarised by Strauss and Corbin (1998). Interviews and research diary notes were the basis of the data analysis. The first phase, open coding of data, involved the naming and categorisation of phenomena through close examination. This was followed by axial coding, with the explicit aim of understanding the data more deeply. Finally, selective coding was applied, whereby more abstract analysis was conducted, and the grounded model was constructed from the empirical data. After open coding, axial and selective coding were applied. Extracts from the open and axial coding are presented in two tables in the Appendix (Tables 2 and 3), and selective coding is presented in Figure 2.

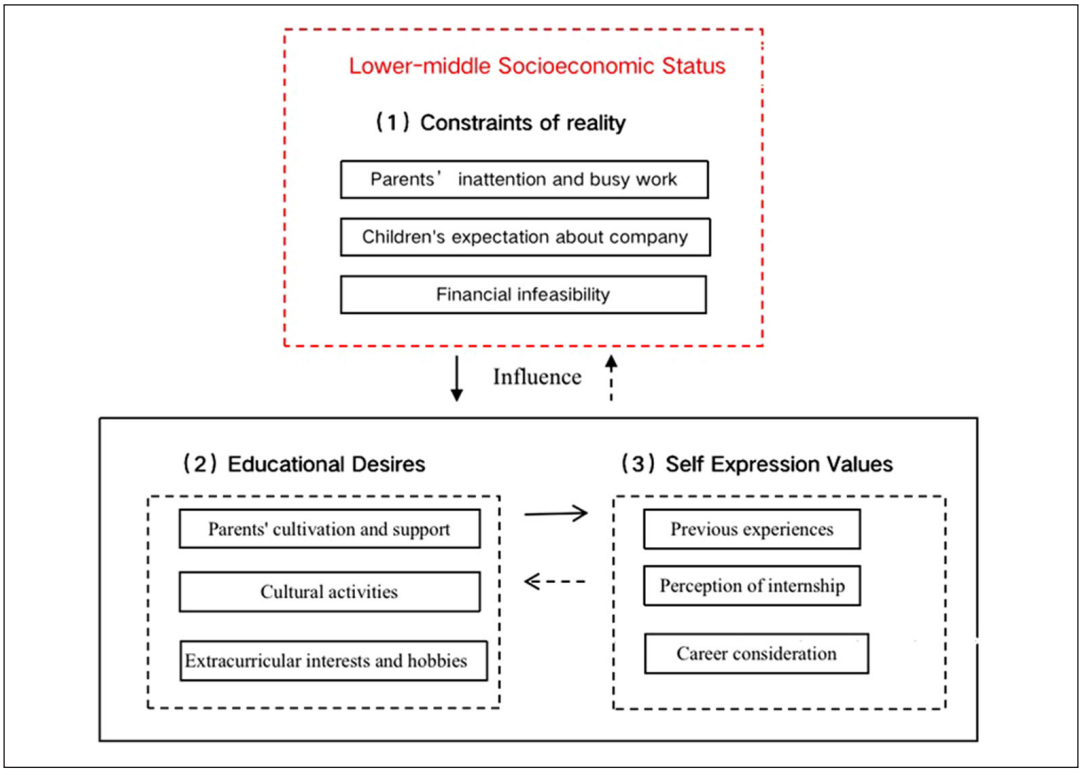

Figure 2 Selective coding

4 Findings and discussion

The majority of interviewees described their family as lower middle class. The financial conditions of their parents were weak compared to the Chinese average, while the parents' education and occupation were also indicative of low social status. Beyond that, the geo-

graphical location of their home and the cultural consumption habits of their family reinforced the finding of low status; moreover, childhood hobbies and extracurricular activities contributed to their upward mobility, according to interviewees.

Although many of the interviewees were aware of their disadvantageous social situations, they were determined to change their socioeconomic status by studying. Chinese parents sent their children to Hungarian universities, ultimately aiming to enhance both their individual and familial cultural capital on their return to China. Their international studies represented a conscious step towards their economic, social, and cultural advancement. Consequently, the respondents were committed to working hard, and in most cases, their parents had not supported them economically while they were growing up.

4.1 The social, economic, and cultural background of Chinese students studying in Hungary

The narrative interviews directly addressed family background from the outset, and most interviewees voluntarily shared information about their parents, their occupation, and childhood memories. There was only one interviewee who seemed to want to avoid providing direct information about his family background: he concealed such details and excused this on the grounds that he was too busy to care about his parents. The remaining 25 interviewees explained that the limited economic resources in their childhood had resulted in limited access to education. Although family income was a very sensitive topic, some interviewees shared information about this openly and directly with the interviewer. While the main focus of the study was cultural capital rather than economic status, explicit expressions, unconscious comments, and observations of interviewees' outfits and personal circumstances made their social class visible. Indeed, some interviewees even mentioned poor housing conditions in their childhood. One respondent openly described his family's poverty, elaborating on his parents' working-class jobs, which had resulted in their low or maximum mid-level socioeconomic status.

> I definitely would say I am from a poor, poor family... It is true, my father is a blue-collar worker, his wages are too low, and he was transferred to another sector. My mother has never had a job her whole life; yes, she is a housewife. My mother sacrifices herself and has cared for me and my father all her life. (Interviewee 9)

Some participants migrated within China before emigration; the geographical location of their birthplace and childhood was also mentioned in some cases. These were rarely upscale neighbourhoods but rather rural areas. While some interviewees came from metropolises, such as Shanghai, with local Hukou (户口, cadastral management), they still originated from relatively disadvantaged areas and confessed that their families were not wealthy:

> As regards previous work, my father was a teacher who taught physics in high school, and my mother ran her own small manufacturing business, but she has sold the product line already. Although I was born in Shanghai, I would not say every person from Shanghai is rich. (Interviewee 16)

Although family economic resources played a fundamental role in educational trajectories, many interviewees admitted that their parents had cultivated, supported, and, in particular, invested in their educational paths, even though their parents' education level was mainly secondary and only rarely tertiary, and sometimes less than average. Moreover, every participant explicitly claimed that having support with their education from their family impacted their choice to study abroad and pursue education in Hungary.

Most participants indicated that their parents expected that their international education would contribute to their upward social mobility and that their studies abroad would be a way of accumulating different forms of capital (Harvey et al., 2016; Lu, 2015; Wong et al., 2015). Perhaps surprisingly, however, Interviewee 23 turned down an offer from a famous British university and opted for a scholarship from a non-Budapest university to further her doctoral studies; the primary reason was that the tuition fee was so high in Britain that she feared putting more of a financial burden on her family. Thus, the Chinese cultural logic of filial piety remained a moral imperative in most interviewees' transnational choices.

Children appreciated their parents' investments and sacrifices for their education. Family affirmation helped the students feel more confident about their transitional experience abroad; their families supported their educational endeavours, in spite of their families' everyday fiscal challenges. The most important form of support was encouragement in their English-language education. One interviewee remarked on how his mother had concentrated on his English skills since childhood, even though she was a labourer and did not speak English. Another interviewee acknowledged the investment in her English language studies of her parents:

> Although my mother does not speak English very well, she helped me get in touch with an English environment very early on; I started taking English classes in the third grade of elementary school. Actually, it was quite difficult for me at that time, but I really appreciated that my mother put pressure on my education. (Interviewee 21)

Another statement by an interviewee exemplified his family's focus on English studies:

> My dad created an outstanding environment for me; for instance, he encouraged me to listen to the English radio every morning. (Interviewee 3)

The other aspect of educational support was the encouragement to study further. An interviewee described his father's concern about his further studies, despite his family's location in a socially disadvantaged area:

> Believe it or not, China attaches a great deal of importance to education, which is essential for boosting economic capital. You know, my parents are successful 'North drift' (北漂, *'beipiao'*), which means they immigrated and survived in Beijing, eventually. But my family was still out in the 'fifth rings' (五环, *'wuhuan'*) – that is, far away from the central area, like in a suburb. However, my father still wanted me and my naughty brother to get educated because he figured that education and being equipped with knowledge would be helpful to our careers and achieving our dreams. (Interviewee 23)

Another interviewee explained that her parents attached great importance to education, despite the fact she was a girl in an environment in which there was 'more attention to boys' (重男轻女, *'zhongnanqingnv'*); her parents had deposited money into an education fund and encouraged her to continue her doctoral studies abroad. She was really grateful for the educational support from her family, while another interviewee highlighted the role of her grandmother in her cultural development; she was taught how to write calligraphy, which is considered to be part of the privileged knowledge of the well-educated elite:

> My grandma has been a great influence on my mother's generation and me. What I want to emphasise is that education is very crucial to our personality development. And my grandparents taught me how to write calligraphy, which has had a great influence on my current writing. (Interviewee 13)

Beyond that, supporting children's extracurricular interests and hobbies – for instance, dancing, playing an instrument, sports, singing, art, and so on – was typical among economically fragile families. While these extracurricular activities might be characteristics of middle-class families in most societies, families with high educational expectations of their children tried to provide middle-class educational support so their children could achieve higher socioeconomic status. These attempts often caused financial burdens for the families. However, most families invested more in purely academic activities and less in extracurricular ones. Last but not least, such hobbies had eased the situation of Chinese students in Hungary: one interviewee highlighted her experience with learning to play musical instruments. Her mother had fostered her extracurricular hobbies:

> Neither my father nor my mother is well educated. Even though she was under economic pressure, my mother still invested in an extracurricular pursuit [for me] – the Chinese dulcimer (扬琴, *'Yangqin'*) – in my childhood. I remember that after three years I was educated by a famous tutor, and she encouraged me to reach a high level of skill on the dulcimer, and my mother continuously supported me. (Interviewee 9)

Well-off households may have schedules for participating in cultural activities and interact in a process of 'concerted cultivation' that elicits children's abilities and talents, while parents in the lower classes and disadvantaged families depend heavily on 'the accomplishment of natural growth', and encourage their children to develop naturally within their boundaries and allow them to develop spontaneously (Lareau, 2002). However, in China, education is regarded as fundamental and is prioritised during childrearing by parents of varying socioeconomic classes; they instil Chinese characteristics in their children via their cultivation in a purposive process, rather than permitting their spontaneous development.

This approach is described by the self-expression values of the Inglehart–Welzel cultural map, which indicate a strong focus on subjective well-being; this signals a change in child-rearing values away from hard work towards creativity and tolerance (Haerpfer et al., 2020). However, our respondents were often left unattended when parents were busy with work, and several interviewees spoke of their vulnerability. One interviewee even explained that their parents' lack of work-life balance had resulted in neglect.

> As my parents were busy at work, they did not spend too much time with me, I felt that they wanted to be with me, but the reality is they needed to work hard for a living. (Interviewee 3)

Several other interviewees also complained of parents' inattention and focus on business.

> My dad had a small agricultural business, which was quite far from home – six hundred kilometres away. I remember my parents didn't always stay with me and my younger brother when we were young. Instead, my grandma took care of us. (Interviewee 2)

> My parents were running a small business. They were not with me much from when I was young, you know, they were busy making money to support the family, then I went to boarding school in junior high, and I was only home at weekends. (Interviewee 10)

This explanation is based on the perspective of children's expectations of their parents rather than the traditional viewpoint of an adult-centred and dominated childhood. Some interviewees were extremely dissatisfied with their parents:

> My childhood was unaccompanied. I lived alone, without the care of any elders. That is the reason I did not study well at my primary and secondary school. Actually, we don't talk a lot, as they only care about their own business. (Interviewee 22)

Most interviewees revealed that they did not develop the habit of engaging in cultural activities, such as visiting museums, theatres, and so on. However, several interviewees showed great interest in cultural activities when they were teenagers. A few interviewees remained uninterested in culture, as they had not experienced this in their childhood. Many other interviewees initiated their own cultural studies and became well-informed about art. One interviewee became a huge theatre fan when he was studying for his bachelor's degree in China.

From this sociocultural perspective, studying abroad seems to be a step towards increasing intergenerational social mobility. Interviewee 13 from a non-Budapest university provided an interesting quotation that illustrated his views about Chinese students with a poor socioeconomic background who dream of studying in Hungary:

> Take me as an example; I come from a rural area in China. My dad couldn't work for physical [medical] reasons; thus, my mom was the only one to support the family. In fact, not all students who go abroad are from wealthy families: the [structure of the] Chinese population does not mean that all people are at the top, for sure. Many extremely ordinary families like us, children from low- and middle-income conditions, dream of going abroad, which means that coming to Hungary is an opportunity for [them]. (Interviewee 13)

He added that the fact that he studies abroad, although not in a highly celebrated British or American university, gives him a unique chance for social mobility:

> I may not need to use the knowledge [I would have got from going] to a high-level university in Britain or the United States. What I have learnt at the Hungarian university has enabled me to find a very good job in my area. Personally, that is: different situations apply to different people. (Interviewee 13)

The number of Chinese students in Hungary is small in comparison to Hungarian students and to Chinese students in Anglo-Saxon or other Western countries. Interviewees of lower-middle socioeconomic status were determined to study abroad and believed that their studies would contribute to their mobility. Students and parents expected that studying abroad would help them build their social and cultural capital. Parents typically support their children to continue their education, despite their own lack of economic and cultural resources. Parents primarily and equally encourage their children throughout their education, and both children and parents anticipate a high rate of return on their investment in the former's future.

4.2 Reasons for studying in Hungary

The family background of the interviewees was working class or lower-middle class. Families made efforts to secure their children's future by encouraging them to study abroad. Therefore, it is relevant to investigate why Hungary was a target country when choosing international mobility. Some previous (practically derived) perceptions about working experiences and specialised courses impacted the interviewees' choices, but the main reason for studying in Hungary was its financial feasibility.

The previous practical perception of work experience also influenced interviewees' decisions; specifically, some participants had encountered a working environment at a time when they lacked good credentials and wanted to pursue further education abroad, but their choices were limited by their financial constraints. One interviewee explained that she had worked as an English teacher and she was considering broadening her horizons and strengthening her future opportunities through obtaining a master's degree.

> I worked as an English teacher in the northern part of China for three years, during which time I helped lots of local students to improve their English knowledge so they could pursue their dreams [of going] abroad. After my teaching, I started questioning whether I should go abroad to broaden my horizons and gain international experience rather than stay in my small hometown for my whole lifetime. And I am sure that I can benefit from the international environment in Budapest. (Interviewee 1)

Additionally, complicated life situations, such as educational diversions and personal challenges, had made some interviewees' lives difficult, and one way of escaping was to study abroad.

> My personal experience is more complicated, I did not graduate from junior high school, and I went to a joint program that secondary school and college as a social candidate. (Interviewee 22)

Indecision and dissatisfaction with work situations were also decisive factors in choosing to study abroad. A Hungarian university education and the associated studies represented a lot more than just obtaining a specific degree; this meant practical academic achievement, diversified attitudes and values, increased language skills, and so on.

> I did three kinds of jobs before I came to Hungary; each job lasted for 3–4 months, which was an experience that frustrated me a lot. I paid more attention to my career trajectory than my emotional well-being. I had to apply to a university in Hungary in order to maximise my academic competitiveness on the job market. (Interviewee 3)

Another student enrolled in a 'lower-ranking' university after a summer internship, as he realised that he would be an assembly line worker if he did not improve his qualifications. In agreement with his mother, he decided to study abroad rather than continue his education in China.

> My initial [period of] study abroad came at the end of my internship. You know, it was really hard and tiring to do manual work without any stimulation. My mother and I both realised that I would have no bright career if I did not choose to study abroad. (Interviewee 11)

While the decision to study abroad was rather straightforward, it was difficult to find an appropriate place due to financial constraints, but Hungary seemed to be affordable to even less fortunate candidates. Needless to say, the relatively generous scholarship scheme was a great help for many students in relation to pursuing their dreams of studying abroad. One might assume that there would be a clear socioeconomic distinction between students who receive a scholarship and those who self-finance their studies in Hungary, but the present study could not identify this. Eleven self-funding students affirmed that they had considered the financial burden on their families when asked about their reasons for choosing Hungary. One interviewee was very explicit about the financial problems that his family was facing, even though he was a self-financed student in Hungary:

> I understand our family was poor during my childhood, and I do need to take into consideration my parents' financial capacity. I did not consider the USA or other countries that have good opportunities and resources. I think Hungarian education is affordable for me and my family. (Interviewee 22)

As a self-funding student, Interviewee 4's initially chose a British university, but she changed her mind after considering the tuition fee:

> The UK has always given everyone the impression of [providing a] high-quality education. I dreamt of going to England for two years after studying in Hungary. However, the tuition fee was increased after the plan to leave the European Union, so I needed to consider my financial capacity. (Interviewee 4)

Two other interviewees practically acknowledged that although they were ambitious to study in the US or the UK, they needed to consider the financial reality, and they wanted to support their studies on their own, not with a student loan. The tuition fee for medical schools is high all over the world, but there are considerable differences among countries in this respect and living costs also vary. In terms of the tuition fee in the medical field, two interviewees who had been in Hungary for the last ten years confirmed that the tuition fee in Hungary is much lower than in the United States, while the quality of education, medicine, and professional opportunities are considered equal by Chinese students.

Finally, although some Chinese students who study in Hungary might be academically less talented and have weaker English than international students in Anglo-Saxon countries, participants regard Hungarian higher education as a good opportunity when considering their career prospects. A direct question about the three most important reasons the respondents are pursuing studies in Hungary revealed that worries about their future career and financial constraints were the most important. A large majority of the Chinese students were realistic and reflected on their opportunities and potential future gains, therefore, they use self-expression to pursue educational and career prospect. One interviewee spoke of her initial source of motivation to study in Hungary.

> I became qualified through my Chinese master's degree… but I don't want to be a statistician all my life. What I hope is that I can have my own project team within five to ten years, step by step. (Interviewee 23)

Cost-benefit analysis had shaped the interviewees' decision to study in Hungary. One interviewee from a small town in western China wanted to achieve a respectable social position in the future. She mentioned that she had done research on Hungarian education before moving and found that there were many Nobel Prize winners from Hungary, so the education level in Hungary must be acceptable. Likewise, another interviewee acknowledged the quality of education at his university.

> I need to consider my future and the reasons for studying in Hungary; one is the university's connections, and the other is an important factor – I think the Hungarian agricultural profession is among the most developed in Europe, so I chose to do my agricultural bachelor's in Hungary. (Interviewee 13)

Another interviewee is a veterinarian. He mentioned the current situation in the veterinary industry in China and that he wanted to be a high-level veterinarian:

> China is a big agricultural country, but the development of veterinary science is completely different from that of the European veterinary field. You know, municipal veterinary practice is basically different from that in towns. Hence, I started to understand foreign education systems and considered going abroad at that time. […] I value the accumulation of experience and improvement in my ability. (Interviewee 8)

The quotations above help verify the argument of Hansen and Thøgersen (2015) that the Chinese state has developed policies concerning students' individual courses of study according to a framework of national development. Furthermore, other interviewees came because specific majors – such as a combination of law and market policy in the form of an 'economic policy major' –were appealing and not to be found in other countries. The respondent wanted to return to their homeland to work in their field or to serve as a bridge between China and CEE when they graduated. The reputation of certain Hungarian universities was considered to be high, and this attracted some students.

> After searching the official website, I found that economic policy was very suitable for my interests, and combined my bachelor-level legal studies and current market policy. The courses mainly focus on legal provisions and concepts. The first consideration must be [that the course is] in line with my interests and future career plans. (Interviewee 3)

Another interviewee had chosen to work with an anti-cancer research team in an institution because of his academic interests. Meanwhile, another interviewee had paid attention to practical work: he mentioned that his university was in an important industrial town in Hungary and that the metallurgical industry was the focus of his interest. Moreover, another interviewee explained his choice as being due to his career plans as a curator:

> I want to become a curator to help artists in the near future. My career plan is currently the only motivation. (Interviewee 6)

The above quotation demonstrates the respondent's strong self-expression. It is also worth mentioning that the choice of location was mainly made by the students themselves, and their parents had supported their children's international studies. This represented a transformation of the traditional familial hierarchy. One interviewee explained this directly:

> I made the decision to study law in Hungary. Actually, my father was initially worried about my safety as a lawyer. But this time, I just mentioned it to him, and he finally agreed. (Interviewee 7)

Overall, the interviewees with a lower-middle socioeconomic background were determined to study abroad. They believed that their studies would contribute to their mobility and that their socioeconomic status would increase. Their parents also encouraged their children. Students made a decision about which country to apply to, but this was constrained by financial matters; several students had made a compromise by choosing to study in Hungary instead of in the UK or the USA. Initially, fee-paying and scholarship students seemed to be distinct, but deeper investigation revealed that they were in a similar socioeconomic situation and were limited by financial constraints.

5 Conclusions

There are three crucial factors for Chinese students from lower-middle-class socioeconomic backgrounds who study in Hungary: the constraints of their SES, educational aspirations, and their desire for self-expression. Their parents' preoccupation with work and concomitant inattention and students' expectations about their parents' financial support and presence contributed to the constrained reality of educational aspirations. Although these constraints existed, the parents had aspirations for their children, which can be seen in their cultivation of cultural activities and hobbies at an early age. On the other hand, career aspirations were managed during this relatively early period of development.

This study has highlighted that the socioeconomic status of Chinese students studying in Hungary is lower than that of those studying in Anglo-Saxon or other Western countries. Students and their parents expected that studying abroad would increase their social and cultural capital. Parents usually encouraged their children to continue studying, although they themselves were short of economic and cultural capital, and typically supported their children's international studies. Those with scholarships and tuition-fee payers were not socially distinct groups because both were financially constrained. While

the students dreamt of studying in Anglo-Saxon countries, most of them compromised by choosing Hungary. Some of them were fortunate to find specialised courses that were not widely available, but most of them made their decision based on conscious or unconscious cost-benefit analysis, and Hungary seemed to be a reasonable choice.

From a theoretical perspective, this study provides a new understanding of the trajectories of students with a lower-middle-class socioeconomic status and identifies factors that determine their international mobility. By distinguishing those with a lower-middle SES from those with working-class backgrounds, student flows into Hungary can be better delineated, as can the aspirations of these two distinct groups. These findings are also relevant for Chinese employers since they will enable them to create new strategies for analysing prospective employees' accumulation of Hungarian credentials and their relevance in the labour market. Furthermore, beyond developing a better understanding of the challenges that Chinese students face, the results of this study are relevant for Hungarian higher education institutions and national policymakers. Ultimately, the findings may enhance the capacity of institutions to create diverse learning environments for Chinese students, while policymakers can use them to ameliorate the impact of students' different social statuses by fostering more equitable international education systems.

One limitation of the research is that it concentrated on students' socioeconomic backgrounds and motivations as applied to international higher education in Hungary and did not include international students from other countries who may find themselves in similar situations. Follow-up studies of other Chinese students in Central Europe are invited to generate further empirical evidence about the transformative nature of studying internationally. Moreover, further study is needed to examine the nature of the accumulation of intercultural benefits (and challenges) for Chinese students in Hungary and the wider vicinity.

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Appendix

Table 2 Examples of open coding

Open coding	
Lower-middle socioeconomic background	*I definitely would say I am from a poor, poor family... It is true, my father is a blue-collar worker, his wage is too low, and he was transferred to another sector. My mother never had job during her whole life, yes, she is a housewife. My mother sacrifices herself and has cared for me and my father all her life.*
Parents cultivation and support	*Although my mother does not speak English very well, she let me get in touch with an English environment at a very early stage.*
Extracurricular interests and hobbies	*Neither my father nor my mother is well educated. Even though they were under economic pressure, my mother still invested in extracurricular interests—the Chinese dulcimer (扬琴, 'Yangqin') in my childhood.*
Cultural activities	*When I was a child, I pleaded with my parents to buy me a piano; they got into debt to buy the piano. I played it for a time and then got bored, but my parents encouraged me to continue practising. To be honest, my parents wanted me to pursue the piano as a hobby rather than as a potential profession. But it helps me a lot to cope with study-related pressure.*
Parents' inattention and busy work	*When I was a kid, I never saw my father during the daytime for many years; he came home very late every day. This is my impression of him. In fact, I had very little contact with him in my childhood, so I personally feel that it is the reason why I was afraid to communicate with boys.*
Children's desire relating to parents' company	*My childhood was unaccompanied. I lived alone, without the care of any elders. That is the reason I did not study well during my primary and secondary schooling. Actually, we don't talk a lot, as they only care about their own business.*
Previous practical perception for working experiences	*I did three kinds of job before I came to Hungary, each job lasted for 3–4 months, which was an experience that frustrated me a lot. I paid more attention to my career trajectory than my emotional wellbeing. I had to apply for a university in Hungary in order to maximise my academic competition in the job market.*

Table 2 *(Continued)*

Open coding	
Internship perception	*My initial foreign study came at the end of my internship. You know it was really hard and tiring to do manual work without any stimulation. My mother and I both realised that I would not have a bright career if I did not choose to study abroad.*
Financial feasibility	*I understand our family was poor in my childhood, and I do need to take into consideration my parents' financial capacity. I did not consider the USA or other countries that have good opportunities and resources. I think the Hungarian education is affordable for me and my family.*
Scholarship opportunities	*My parents had already offered me support for my master's degree, so I was embarrassed to ask again for support for doctoral study. I got an offer from the United Kingdom, but the major consideration was finance. Thus, I accepted the scholarship from Hungary.*
Consider career path	*I need to consider my future; one reason for studying in Hungary is the university's connections, the other is an important factor – I think that the Hungarian agricultural profession is among the most developed in Europe, so I chose to do my agricultural bachelor's in Hungary.*

Table 3 Axial coding

Axial coding	
Lower-middle socioeconomic background	
Educational desires	Parents' cultivation and support
	Extracurricular interests and hobbies
	Cultural activities
Self-expression values	Previous practical perception of working experience
	Perception of internship
	Consideration of career path
Reality-based Constraints	Parents' inattention and engagement with work
	Children's expectation of company
	Financial feasibility
	Scholarship opportunities

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Young people's moral decision-making and the Covid-19 pandemic in Hungary

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Abstract

There is a deficiency of in-depth investigations of young people's moral decision-making during the coronavirus pandemic. The current article studies such decision-making with respect to socializing with peers, drawing on 44 interviews with Hungarian university students. The interviewed students overwhelmingly changed their socializing behavior because of the pandemic, however their concrete actions showed great differences. For some it was enough if they greeted their friends differently, and did not drink from their glasses, whilst for others greater changes were made in their former socializing habits. Based on their accounts, the following factors influenced their socializing: taking responsibility by not infecting others (concentrating on family members), conformity (alignment with friends' behavior), closeness of relationships, epidemiological restrictions and rules, and fatigue and growing familiar with the pandemic connected to the passage of time. Whilst research on decision-making during the pandemic has primarily been quantitative, we argue that this study illustrates how qualitative research can provide valuable input.

Keywords: Covid-19; pandemic; qualitative study; moral decision-making; sociology of morality; socializing habits

1 Introduction

Like in other countries, the Covid-19 pandemic drastically changed life in Hungary (Ságvári et al., 2021). Suddenly, some things that people could take for granted beforehand, such as being able to go outside whenever one wanted, being able to meet family and friends were put into question. Some of the changes were mandatory as a result of regulations, while others were voluntary. Lay people were faced with a range of new moral dilemmas on a daily basis, and the decisions they made had high-stake consequences at the societal level.

The degree of moral obligation of protecting others from infection can be different among individuals and societies (Schiffer et al., 2021). In Hungary, the government rhetoric

identified the crisis as an 'existential threat to the entire Hungarian nation', which endangered human lives, society, and the economy (Molnár et al., 2020, p. 1169). The severity of the threat was emphasized, which served to support the claims of special measures needed which restricted certain rights. At the same time, there were some inconsistencies in the rhetoric of the government party, as prominent party politicians were sometimes photographed without masks, and abroad at the Adriatic Sea in summer, whilst Hungarians were asked to go on holiday within the country because of the pandemic (Babos, 2020). Ethical statements appeared in government videos, texts, and posters relating to the pandemic. 'Let's look after each other' and 'All lives matter' slogans were present in many outputs.

Measures to alleviate danger introduced in Hungary during the pandemic included education going online, obligatory mask wearing, opening hours of shops and catering establishments being shortened, the number of people that could go into stores maximized per area, closing of in person eating/drinking in the cases of restaurants, cafés, and pubs inside, the closure of gyms; and for some time in the spring of 2020 people's movement was restricted in such a way that they could leave their homes only for certain reasons like working (Molnár et al., 2020). The number and severity of the measures to counter danger varied during the pandemic. In the spring of 2020, there were very strict restrictions, then as early summer arrived and cases were dropping, restrictions were lifted one by one, and during summer there were only a few restrictions, whereas in the fall of 2020, when our interview research took place, with the cases also climbing, restrictions were slowly put into place again one by one.

The pandemic presents an interesting case with regard to ethics in many respects. In Hungary it was primarily presented in the first year as dangerous to the health of only certain segments of the population (the old and chronically ill people). This was emphatic in government communication. For part of the pandemic there was a separate period of shopping hours for old people. During these hours older people could go shopping, but younger people were not allowed. These special hours for the older people sometimes caused conflicts, and stigmatization of older people also occurred on the basis that supposedly they could not properly adhere to rules (Szabó-Tóth, 2020). Thus, one can see, that whilst dangers were presented to be relevant for just part of the population, at the same time the pandemic seriously disrupted the lives of everyone. Some of the disruption was due to adhering to regulations, others due to voluntary changes in lifestyle for those who made some changes or who were in contact with others who decided on changes that also had an impact on those in contact with them.

Our research involved 44, primarily online semi-structured interviews with university students in November of 2020. It can be interesting to study young people's moral reasoning, as restrictions applied to them as well, whilst at the same time the danger of the illness had been presented to be negligible for them. And previous European research shows, that young people were especially emotionally scarred because of certain restrictions that meant that they were able to meet with their peers and other people less (Eurofound, 2020). Young people can contribute to a higher spreading of the virus in society, as they often live more active social lives than members of other generations. They can spread the disease more easily as they might have milder or no symptoms of the disease. A quantitative empirical research in Hungary revealed that the number of contacts young people had with other people was reduced amongst young people in 2020. However, it

declined less than amongst older people. And younger people traveled more in the summer of 2020 than older cohorts. Traveling in summer contributed to the second wave of the pandemic in the fall of 2020. In the fall, coronavirus numbers started to go up first in the younger generations (Kolozsi, 2020). This shows that the behavior of young people can impact seriously how the pandemic unfolds, thus it is a relevant object of study.

Young people have also been claimed by some experts to be at risk of low compliance with health measures that were put in place during the pandemic (Chan, 2021; Nivette et al., 2021). WHO even gave out an appeal to young people to comply more with these measures, WHO Director-General Tedros Adhanom Ghebreyesus argued that 'the choices you make about where you go could be the difference between life and death for someone else' (Nebehay, 2020).

Young people are not particularly at risk from a health point of view, but their previous way of life has been significantly disrupted by the pandemic. According to a 2020 survey of young people in Hungary, 44 per cent of young Hungarians aged 15–29 experienced some – typically negative – changes in their lives due to the pandemic. The effects of the pandemic restrictions are also reflected in leisure activities and can encourage an increase in the time spent outdoors and the value of personal encounters. At the same time the number of visits to places of social life decreased. Based on the results of the survey, young people see the lack of friends and communities as a significant problem (Domokos et al., 2021). The important role of peer relationships is also proved by a Hungarian focus group research conducted in 2021, which covered the issues of community and individual resilience. Despite the difficulties caused by Covid-19, the support received from friends among 18–39-year-olds showed a higher proportion compared to other age groups and a good part of the helping relationships of the 18–39-year-olds – especially during and after the first three waves of the pandemic – were reciprocal (Bartal et al., 2022). While Bartal et al. (2022) examined how the various networks of relationships functioned and to whom people gave and from whom they received support during the epidemic, we are looking for the answer in the current study as to what moral decisions were behind choices to meet with peers.

We were interested in what university students' accounts tell us about how they make their moral decisions during the pandemic and how they reason about their behavior. We concentrate on moral decisions regarding socializing with peers and friends. Thus, our research questions are:

1. How did students change their socializing habits with their peers as a result of the pandemic and what is their moral reasoning about their socializing behavior?
2. According to their accounts what influenced this socializing behavior?

Most research on morality and Covid-19 concentrates on moral dilemmas faced by the clinical sphere often discussing moral distress as result of the difficulty of the allocation of limited resources to patients (Silverman et al., 2021). At the same time, a range of research has also been conducted about lay decision-making in the Covid-19 era (Chan, 2021; Ipsos, 2020; Schiffer et al., 2021; Nivette et al., 2021). Findings of this body of research indicates that one factor that correlates with compliance with measures is how much danger for the individual is perceived from the illness (Harper et al., 2020), and this we know could have been lower for many young people in Hungary, especially as the dangerousness of the disease was not emphasized for their age group. Additionally, a Hungarian quantitative study showed that there was no uniform reaction to hygiene customs and

adherence to preventive measures during the pandemic (Ipsos, 2020). An online survey of 840 Hungarian adults in the April of 2020 reached the results that those respondents who were aged 18–30 were the most likely to agree with the statement: 'The correct procedure is to not order a curfew, but to keep everything open and not to restrict the people in their usual activities: whoever catches the virus, catches it' (Szabó-Tóth, 2020).

Still, as earlier research is mainly quantitative, not much is known in detail and depth about young people's moral decision-making during the pandemic. If they do see some their peers less, what is their reasoning why they do it? Whom do they still choose to meet with in that case and under what circumstances? What are some actions that they do take which they feel contributes to 'good' behavior under the circumstances and why? Some of these are actions that a quantitative research working with previously formed categories might not come up with – e.g. not drinking from the same cup as other peers was seen by some as an important act that they do to not contribute to the spreading of the disease for example.

Our study contributes by providing a deep qualitative investigation of moral decision-making of young people, embedded in the sociology of morality, during a healthcare crisis. Information on people's moral reasoning in such circumstances has implications for policy making and for communication about protective health measures.

We are studying this in the Hungarian context, where the emphasis was especially strong in the government communication in the investigated period that it is the old and chronically ill people who are being in danger from the illness.

In the next section we discuss sociology of morality and the conceptualization of liminality. After the 'Data and methods' section, we turn to discussing the results of the interviews, first with respect to how the interviewees socializing habits changed with their peers as results of the pandemic, then looking at what were some factors that surfaced from the accounts that influenced their decisions. In the final section we discuss the main findings, their limitations, formulate implications for further research on the topic and for public health communication campaigns.

2 Background – moral decision-making in liminal periods

Although some founding thinkers of sociology, such as Durkheim and Weber have dealt with morality, afterwards it was a rather neglected topic within sociology for a long time (Sayer, 2004). Within the last decade or so, greater attention has started to be given to it again (Abend, 2010; Hitlin & Vaisey, 2010; Bykov, 2019, Stets & Carter, 2012). Some authors are even writing that we are currently at the 'dawn of a new sociology of morality' (Shadnam et al., 2020). Some see this new momentum within sociology as a result of critically reacting to the growing body of work in psychology and philosophy (Bykov, 2019; Shadnam et al., 2021).

Whilst some psychologists work with a concept of moral universalism, sociological research on morality has demonstrated how people in different contexts can understand moral categories in very different ways (Hitlin & Vaisey, 2010). This has been one important contribution sociology has made regarding questions on morality.

Although morality is being discussed more in sociology again, sociological thinking on the topic is very diverse and fragmented (Shaw, 2016) and contributions belong to different subfields within sociology. Hitlin and Vaisey (2010, p. 8) aimed to initiate a 'stronger collective identity' for the sociology of morality. A barrier to a unified sociology of morality is that moral is not understood in only one way: some sociologists (primarily social psychologists) use it to denote something that is of value, behavior that is good, often using it as a synonym for altruistic, whilst other sociologists use it in the sense that people make distinctions between good or bad. Hitlin and Vaisey bring the example of the practice of female genital mutilation. They argue, that as some group of people regard this act to be a part of good life, it is a moral practice in the second meaning of the term. Whilst, according to the first definition, it can be regarded as immoral by those who denounce the practice. In our study, we use morality in the second sense of the word.

In the current study we build also on Sayer's understanding of lay morality. We refer to lay morality as a morality of non-experts that concerns 'questions of what concrete behaviours or practices are good or bad, how we or others should behave and what we or others should do' (Sayer, 2004, p. 3).

Within sociology there is a debate on when people make moral choices, how much of this is an automatic process, occurring below the level of conscious awareness, a moral habitus, and how much of our choices involve deliberative, conscious, logical reasoning (Shaw, 2016; Luft, 2020). Some authors argue that we cannot be reflecting on our actions all the time – and that is why often moral action can be considered as habitual. Psychology also emphasizes that sometimes we act without consciously thinking through the moral reasons (Bykov, 2019; Haidt & Joseph, 2004). Whilst we agree that in some cases moral action can be habitual, our argument here is in line with Luft (2020) who argues that that there can be new situations or new events that cause us to reflect on our actions – and reaction to the Covid-19 pandemic can be such.

The above arguments on the pandemic as a disruptor of habitual moral reasoning tie in with published studies that referred to the concept of liminality in connection with the pandemic (Bell, 2021a; 2021b; White & McSharry, 2021). As Turner (1969/2011, p. 94) quotes Arnold van Gennep's 1909 writing, he called the 'liminal phase' the state of transition, when the 'ritual subject,' the individual or corporate (the 'passenger') 'passes through a cultural realm that has few or none of the attributes of the past or coming state' (Turner, 1969/2011, p. 94). In this in-between state previous normative structures are disrupted. As a consequence, liminal periods can contain ambiguity, fluidity and disorientation (Bell, 2021b). During the pandemic the taken-for-granted structures of daily life were disrupted worldwide. Previous research has shown that the pandemic has changed how the passing of time is perceived, has influenced changes in identities, subjectivity, has had an effect on how we view our relationships, our notions of community (Bell, 2021a; 2021b) to name just a few of the many changes involved. As a consequence of this 'rupture in normativity' and 'disturbance in social relationality' (Cover, 2021, p. 1), we argue that individuals could not react habitually with respect to the ethical dilemmas they were faced with.

In this sense, the pandemic presents a unique situation: as it disrupts everyday, habitual action, a lot of choices have to be made, that did not have to be made before. And indeed, what is right and wrong behavior has become a topic to be discussed: talk of what

is good conduct is a topic in the media, used by politicians. As far as our own non-representative experience is as authors of this study, the topic has seeped into the discussions amongst some people in their everyday lives in Hungary.

We agree with Luft (2020) also in the issue of situatedness. The situatedness of moral decisions needs to be taken into account when analyzing moral decisions. Characteristics of a situation can shape choices. The same person might choose to do something differently in situations with different features (Luft, 2020). In our study, we were interested for example, to what degree youngsters exhibit cautious behavior with respect to the virus and how and whether others' behavior that they are together with at the time might influence them.

Everyday morality of people has been argued to allocate more priority to helping people with whom we are in a certain relationship – for example members of our family – than helping strangers (Parfit, 1984). In the study, we aim to examine how this manifests itself in the case of the pandemic: how arguments are different based on worrying about one's own family member than, for example, about old people in general.

3 Data and methods

Within the framework of the research, 44 semi-structured interviews were conducted with university students studying in Budapest. Most of the interviews were conducted via online videochat, because of the pandemic. Interviews lasted typically around 45–60 minutes.

The interviews were conducted by young interns, themselves university students, who had rigorous training beforehand by one of the authors of this article. We felt the youngsters might open up more about their habits related to the pandemic to other young people. All interviewees were Hungarian students of the Corvinus University of Budapest.

The sample contains 24 interviews conducted with women and 20 interviews conducted with men. The age of the interviewees is between 19 and 25, and the mean is 21 years. Families of 16 interviewees live in Budapest and the families of the others live in the agglomeration or further from Budapest. Interviewees studied in diverse fields at the time of data collection: economics, human resources, economy and management, economic informatics, commerce and marketing, communication and media, international studies, financial accounting, tourism and hospitality management, political science, and rural development. It was important that the interviewees were university students during the data collection period, so they faced – at least partially – similar challenges and decisions during the outbreak of Covid-19.

The interview guide encompassed two main question blocks. The first one focused on friendships, and the second one focused on family relationships. Both sets of questions covered the way of keep in touch, communication, individual practices to meet in person, and changed relationships during the pandemic. The interview guide also contained questions that asked the interviewees to tell about specific examples, specific situations, how they met their friends or family members or if conflict situations have arisen. In this study we concentrate on the answers they gave to questions on socializing with their peers.

Each interviewee filled out an informed consent form. To protect the anonymity of the interviewees we use even changed first names to denote the research subjects in the analysis.

In the analysis we conducted qualitative thematic analysis, taking into considerations detailed by Braun and Clarke (2006). Thematic analysis involves 'searching across a data set – be that a number of interviews or focus groups, or a range of texts – to find repeated patterns of meaning' (Braun & Clarke, 2006, p. 86). Initial categories we formed were partly deductive – based on the literature, but partly also inductive – based on studying the data set.

4 Results

In the following we discuss our findings from the interviews with respect to how they changed their socializing habits with their peers because of Covid-19, and what seems from their accounts to have affected their choices.

4.1 The change of students' socializing habits with their peers as a result of the pandemic

The overwhelming majority of the interviewed students changed their socializing behavior because of the pandemic (and not just when it was mandatory because of official regulations). However, their concrete actions showed great differences. Some students' voluntary actions involved only minor changes such as greeting their friends differently and not drinking from each other's glasses, whilst some others made greater changes in their socializing habits. A very small minority reported on not making any changes at all.

According to some interviewees the pandemic mainly affected the location of the meeting (outdoor vs. indoor), how many people were to be present at the gathering, and the precautions taken during the gatherings (e.g., avoiding physical contact, possibly wearing a mask, for some just not drinking from another person's glass) or the general atmosphere of the gatherings. While a few other interviewees – typically those who attended a house party or bigger gathering during the pandemic – said that the pandemic did not affect the gatherings, and nothing would have happened differently in a non-pandemic situation.

Based on the interviews, a typical change in socializing habits is a change in the form of greeting. Most interviewees mentioned some alternative form of greeting to avoid physical contact. Among them, the fist / elbow patch is popular, but someone also mentioned 'kiss in the air.' However, a minority of the interviewees did not change the form of greeting with their friends due to the virus and still used to greet their friends with hugs and/or kisses. One of the interviewees said: 'I don't think greeting matters so much since we are in the same room, that is not the point' (Sophia, 20).[1] A few pointed out that they

[1] The names of the interviewees mentioned in the study are pseudonyms.

greet each other mixed or differently according to company or adapt to the other party's preferred way: 'I'll be honest, with a hug, [...] but I always asked the other if it's okay' (Chloe, 20).

In addition to the greeting, a few interviewees paid special attention to another indirect form of physical contact: they did not drink from the same glass/bottle in a row during a party or gathering.

> For me personally, my behavior was limited by the fact that we don't drink after each other in a row [...] it was weird that I was there at a gathering of friends, and I had to pay attention to where I put my glass, who I was drinking after, so that someone might not drink from my glass. (James, 20)

> Everyone pays special attention to that everyone drinks from their own glass, no one drinks from the same thing, which I think they did not care about in the past. (Nora, 19)

Among those who mentioned avoiding drinking and/or eating one after the other, some experienced this as a practice that required attention and extra energy – like the interviewees cited above. These interviewees felt that this extra attention was specifically due to the virus and with this practice they protected themselves from the spread of the virus – regardless of whether they had been in airspace for an extended period of time anyway. One interviewee evaluated this practice as the 'lowest minimum' but also linked it to the pandemic. Only one interviewee mentioned that they had done this before the pandemic and it was not really a new practice for them.

There were differences in interviewees' actions over time. During the first wave of Covid-19 (in spring 2020) – based on the interviews – the two main strategies for gatherings of friends can be identified: do not meet at all or meet only outdoors. Slightly less than half of the interviewees clearly stated that they did not meet their friends in person in March and April of 2020. Those who chose not to meet at all, mainly kept touch via online calls or phone calls. Youngsters linked this strict step to the official restrictions in place at the time and to their fear of (infecting others with the) the unknown virus. A few interviewees' strategy was to only meet with friends who were known to be careful. Furthermore a few other interviewees did not have any strategy during the first wave of Covid-19 and met with friends like before the pandemic. According to these interviewees there were those who were not careful at all, they just followed the rules with their friends, and there were those who asked each other before the gathering if they could meet safely: 'and after everyone had confirmed where they were, who they met, what they did in the last two week, then the meeting was completely as if there were no virus at all' (Elizabeth, 23). Towards the end of the spring period (2020), all interviewees started meeting their friends again, when the restaurants and cafés opened, but most of them met in cafés only with an outdoor section (even taking care of the distance).

During the summer most interviewees relaxed their attitude towards gatherings of friends: most of them were more cautious than before the pandemic, but less cautious than in the spring, while about a quarter of them totally returned to pre-pandemic practices. For the interviewees, who did not return to pre-pandemic practices, the main strategy during the summer was to meet friends outdoors. As the weather in Hungary always allows outdoor programs during summertime, the argument of the students whether they chose this way of meeting because of the pandemic or not, did not appeared sharply.

The interviews were conducted in November 2020. According to most interviewees, in the fall they gradually became more and more cautious – but even when the data collection took place, most of them were not as cautious as in March, although the virus was more widespread and the number of infected people was much higher. During this period the main strategies of the interviewees were to meet less frequently and/or meet with less people and/or meet only outdoors. Regarding to the autumn period, some interviewees reported a kind of internal conflict: they felt the 'weight' of the spreading virus, but at the same time they presumably had difficulty with self-restraint. The interviewee cited below also mentioned some kind of guilt about her socializing habits.

> Sometimes I have a little bit of guilt about what I'm doing. And sometimes it comes to me that I shouldn't. But I'm really trying to be careful, so don't contact anyone other than my own social circle. (Lisa, 20)

A few others emphasized that for the sake of their own mental health, it is important to meet others. Overall, despite the even worse virus situation, the degree of confinement they did in the spring of 2020 was not achieved in the autumn of 2020 because they wanted to protect their own mental health.

During the interview, the interviewees also responded to how the last gathering of friends they attended had taken place. As a result, we got a more detailed picture of how they met their friends around October–November and how they felt about it. Overall, the interviewees had a good time at the last gathering of friends, and a few emphasized that it was especially good to be together in the pandemic situation. Some interviewees felt some anxiety because of the Covid-19 situation: 'I was more anxious than before the pandemic. I was less able to let go because I constantly thought and watched not to eat one after another, not to drink one after another, who I know might have encountered or been in contact with infected people at university or at work' (Michael, 21) or 'the use of a face mask caused a lot of discomfort and strange things, lost intimacy in our circle of friends, lost the feeling that we are a community and belong together' (Hannah, 20). As the latter quote shows, the face mask caused inconvenience and limited the behavior of young people. In addition, 'exit restrictions' were mentioned by the youngsters, which limited their opportunities to meet. In some cases, the extent of this concern did not affect the interviewee's mood: 'there were situations where I felt we could pay more attention to this, but it didn't spoil my mood so much' (Emma, 19). While a few others were able to completely 'forget' the pandemic (e.g., 'we obviously didn't think about the virus situation there' (Luke, 20)).

4.2 Effects influencing students' socializing habits during the pandemic

According to the interviews five main groups of effects influencing students' socializing habits can be identified:

1) taking responsibility – not infecting others
2) conformity (alignment with friends' behavior) and conflicts,
3) closeness of relationships,
4) epidemiological restrictions and rules,
5) passage of time – fatigue and habit.

4.2.1 Taking responsibility

Young people primarily argued that they are not afraid of infection because they are young and have a strong immune system. Like the interviewee cited below, most interviewees had a fear of affecting others.

> I am afraid of it [the Covid-19] but most of all I am afraid that if I get infected, I will pass it on to someone and I am not really afraid of what happens to me, but that I will infect someone, and it may not affect me, but I can affect someone else because of it. (Samuel, 20)

In some cases, interviewees feared the potential negative consequences that the virus may have: 'in the worst case, someone's going to die' (Liam, 20). In slightly more than one quarter of the cases, general responsibility was identifiable: students acted aware that they would not want to pass the virus on to anyone. Some interviewees also mentioned elder and/or chronically ill people in general. However, the protection or the fear of infecting family members or relatives was much more strongly present. Fear of infecting someone else was primarily directed at elder and/or chronically ill family members, especially grandparents, maybe parents or any other relatives at higher risk. E.g., one of the interviewees (James, 20) put it as his 'constant fear' of infecting his grandparents.

In the case of interviewees who met family members they feared for in person during the pandemic, this fear also affected their social behavior. A popular strategy to overcome this – especially among the youngsters living in dormitories or rented apartments/rooms – was to align social events and home visits: they did not attend a social event for a certain period of time before visiting home or did not visit home for a certain period of time after a social event.

> Well, actually since no one from this group of friends went previously anywhere else, but they stayed at home, I had no guilt about it. But obviously I didn't want to risk it and I stayed at home, so I didn't meet my parents or anyone else for two weeks after that. (Elizabeth, 23)

There was also an interviewee who, instead of using time logistics, did not go to clubs at all – specifically to protect family members.

A few interviewees even linked this fear of infecting older family members with a kind of guilt they feel about their behavior, like Lisa, who lives in one household with her grandmother:

> Lisa, 20: I have a fear because of my grandmother, because I live with her too.
>
> Interviewer: And then because of that, are you paying more attention to keeping the restrictions?
>
> Lisa, 20: Yes. Sometimes I feel guilty for paying not as much attention as I should.

'Guilt' and 'clear conscience' were mentioned in two ways. On a micro level connected to the protection of family members. On a macro level: when the spread of the virus got worse in autumn, some of the interviewees felt a kind of guilt that they do not contribute to curbing the pandemic.

4.2.2 Conformity and conflicts

According to the interviews, the circles of friends were usually mixed in terms of 'how serious' they are about the pandemic, but there are also some circles of friends where the attitude was very unified or had become unified as the pandemic progressed. 'In the beginning, it was very varied how we responded to the news, but since it [Covid-19] arrived [in Hungary], we have approx. the same level of knowledge, we know something about it, we have seen what it has done to the world, so now I feel that we are on the same side' (Chloe, 20).

Disagreements were not primarily about mandatory measures, but about precaution (e.g. avoiding parties or not), and the severity of the virus situation in general. One interviewee (Emily, 21) stated in this regard that if someone 'needs to control himself/herself' (e.g., has met a Covid-19 positive person previously and then must consider who they will inform about it and how they will handle the situation), opinions and actions are divided. The following quote also refers to the differences in 'self-restraint': 'it was suddenly accepted in the summer for people to meet more freely, most of my friends took this opportunity and went abroad on holiday or met more often in the summer, yet I did not do this' (Lucas, 21).

Regarding wearing face masks, interviewees mentioned examples of conformity in both directions: cases where friends did not wear a mask and therefore the interviewee did not wear a mask, but also cases where friends wore a mask, and the interviewee wore one only because of that. Some preferred to align with others in their behavior, whilst others were not happy with conformity as a coercive force, however, still acted accordingly in certain instances.

> I prefer to adapt to the other's preferences how much he or she doesn't want to wear a mask and keep a distance (Emma, 19).

> It's a common fact that the crowd around you is shaping your behavior too. By wearing face mask, they are forcing me to wear it too, because if I don't wear it, I'll feel bad. Because I don't know if they want me to wear it, or they just stayed like that automatically. I don't wear a mask outdoors just because others are wearing, but if it's on everyone in a crowd, around 20 people, I would wear it [the face mask] as well, because they can excommunicate me or look at me badly. If that circle is important for me, I will wear the face mask, if not I will walk away. (Hannah, 20)

4.2.3 Closeness of relationships

Some interviewees' practice was based on trust and the closeness of relationships: if they trusted someone, personal contact and unmasked gatherings were considered less dangerous, although these people could also meet other people.

> Interviewer: You mentioned that there were those who did not wear a mask next to you and she/he did not comply with the obligation to wear a mask so much. What are your thoughts on this?

> Liam, 20: It depends, it really depended on how close he was to me at the acquaintance level. Specifically, the mask is not obligatory in the trainings there anyway, and obviously during the training it is not possible to wear it, but not even in the locker room, but because I know him, I know him better, so I trust him better, let's say. In college, if we sit inside the room and someone doesn't wear the mask it's a little more uncomfortable, so it isn't really okay for me.

Thus, the above interviewee clearly linked the level of acquaintances or friendship, the level of trust with how carefully he behaves near a given person, how much he seeks / avoids contact with him. Some interviewees changed their form of greeting for their not-so close friends, whilst felt completely okay to greet their close friends as they did before the pandemic:

> I greet my closest friends just as I did before the virus, so a handshake, maybe a hug. This affects about a 5–10 people that I think are my close friends and the virus hasn't changed my greeting with them. While with the simple, not-so-close friends or acquaintances I changed it and turned the handshake into a fist-in. (James, 20)

In the case of the girls when greeting close friends, the main practice was to change the kiss on the cheek to a hug, like in the case of the interviewee cited below:

> Max. hug each other, we didn't do that much kissing on the cheeks there because we tried to be responsible. (Nora, 19)

Although it was not clearly articulated by the interviewees it is assumed that they have limited the number of friends they meet on one hand in order not to spread the virus to a high degree. On the other hand, they linked who they would meet to the level of trust, presumably to protect themselves and their microenvironment from the virus. Behind the narrowing of the circle of friends among youngsters during the pandemic may be the general effort to stop the spread of the virus, and on the other hand, the protection of the microenvironment. The link to trust is relevant in some cases, when young people have highlighted that they know about these friends that they usually go to only a few places, but in some cases, there is no such logical argument behind it and the interviewee does not necessarily know exactly what places the other person has been to. The emphasis is on minimizing, not on full effectiveness in the case of stopping the spread of the virus and protecting the microenvironment as well. This means they were mostly looking for practices which approached defense but did not involve total stay-at-home or total abandonment of activities.

4.2.4 Epidemiological restrictions and rules

One of the simplest and clearest components in the change of the social behavior of young people is the component of external effects, 'coercive forces': epidemiological restrictions and rules currently in force. The official restrictions mainly affected the young people in the choice of location and the length of the gathering. Also, if it was mandatory to wear a

mask at the chosen location, it may have strained their behavior, as they reported. Regarding how the gathering would have happened if there were no pandemic, some interviewees highlighted the wider range of program options and the possibility of physical contact: they could have gone to several places to have fun; there should have been no attention to the night curfew etc. When in other places restrictions were in place, gathering in each other's apartment was clearly the form in which the youngsters felt most at ease. Although, during the first wave of Covid-19 most interviewees ruled out this possibility and only later took it as an alternative.

Most interviewees were talking about the official epidemiological restrictions and rules as something 'necessary but unpleasant'. They argued that although they see the restrictions as inevitable and they strive to abide by the rules, restrictions significantly affected their social life, family life and their mental health in general. The attitude of the interviewee cited below fits this: she argued that she accepts the restrictions, although she is uncertain in the new unusual situation.

> Well, there are two things that strain me. On the one hand, there is the issue of following the rules, and on the other hand, there is the issue of mental health. So that I agree with these restrictions, to wear a mask on the bus, and I don't think restrictions for a restaurant are just bad, it's just so unusual. I couldn't get myself into this yet, so, how long this will be, how long will I have to behave like that, but I agree with them. (Grace, 20)

It should be highlighted that like the socializing habits of the youngsters were not directly proportional to the severity of the virus, the official epidemiological restrictions and rules were not either. This will be discussed in more detail in the next subsection.

4.2.5 Passage of time – fatigue and habit

As we discussed, the behavior of the interviewees changed over time. There is a transition in the way the pandemic has been present for a longer time, how the official restrictions have changed and how the youngsters have reacted to all of this in terms of social gatherings. As the pandemic first hit the land, the interviewees were strict with themselves and acted more cautiously. During the spring of 2020 most of the interviewees not even met with their friends, they kept in touch online or via phone. Some interviewees met a low number of friends outdoors and only a few interviewees met a low number of friends indoors. In the summer of 2020, as the restrictions eased, so did the youngsters' behavior. Most of the interviewees returned to pre-pandemic habits regarding social life: they gathered like before the pandemic, they did not wear face masks or did not pay special attention to avoid physical contact. A few interviewees mentioned that they were more careful even during the summer: they gathered outdoors and/or met only a few people. Then, in the fall of 2020, the pandemic deteriorated again, and over time, the restrictions returned, but overall, the behavior of young people was much more lenient than in the spring of 2020, when there were significantly fewer people infected. When the interviews were conducted – in November 2020 – most of the interviewees mentioned that they just started to

act more carefully again, but not as careful as in the spring of 2020, during the first wave of Covid-19. It is important to highlight that new restrictions[2] were announced directly before the data collection.

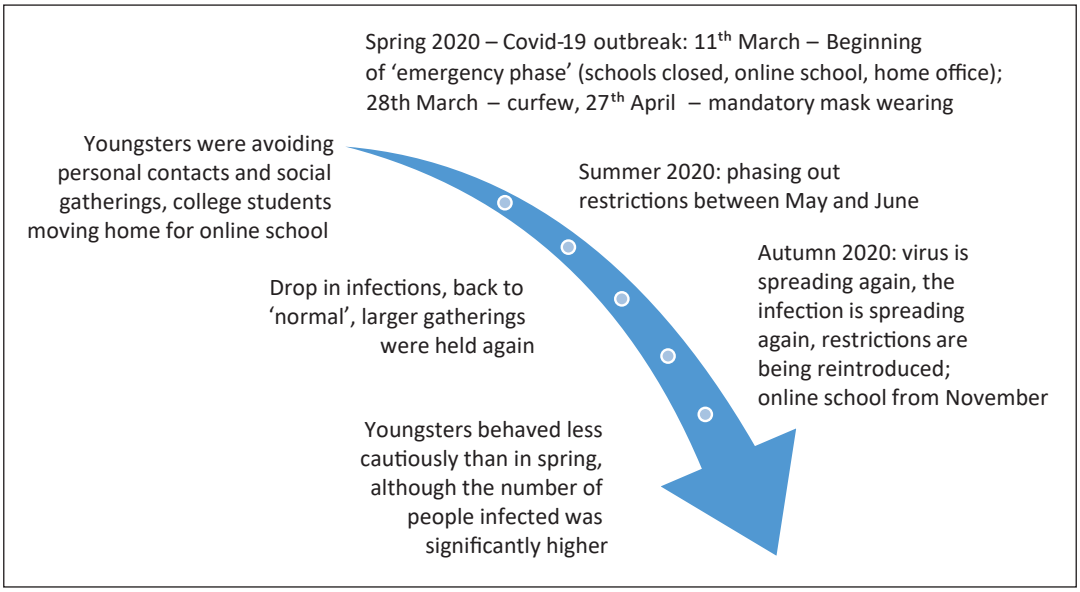

Figure 1: Covid-19 restrictions between spring of 2020 and autumn of 2020, in Hungary

Only some interviewees tried to find the reasons of the contradictions of spring and autumn behavior. Based on the interviews one of the possible reasons of people being inconsistent in their responses to health measures is 'Covid-19 fatigue' – they got tired of the constant care and caution and felt that meeting friends is an important element of their life and relaxation is a legitimate reason to meet:

> I think a little bit everyone is tired of this [pandemic] and in addition to study, we also have to relax a little sometimes, if a little more careful, but at least we can meet each other. (Ellie, 21)

Some interviewees mentioned that their mental health was affected by restrictions and their changed lifestyle or they hinted that they were behaving the way they were for their psychological well-being. Youngsters felt that their mental health suffered especially the first wave of the Covid-19, when their gatherings were suddenly restricted or did not

[2] Restrictions were in force from 11th November 2020. Universities and colleges switched to online education. Colleges of higher education institutions were closed. There was a curfew between 8 pm and 5 am, everyone had to get home by 8pm. All gatherings were forbidden. Private and family events (for example: birthdays) could be held for up to 10 people. Restaurants had to close. It was forbidden to hold any kind of event. Sports matches had to be held behind closed gates. Individual outdoor sports were allowed. Visiting any leisure facility was forbidden. Wearing face masks and keeping distance was still mandatory at the previously specified locations.

meet their friends at all. A few others argued that at first there was little information about the virus, youngsters were more afraid of it and later they got to know the possible outcomes of the infection more. Another possible reason for the different behavior in the fall based on the interviews can be linked to the university: the semester started with offline education and because the current restrictions allowed to meet in person and the youngsters constantly met in the university anyway, they did not feel the need return to the strict self-restraint that characterized the spring.

5 Discussion and conclusions

The Covid-19 pandemic presented a unique opportunity to study people's moral decision-making in a liminal period of disruption, where moral decisions could not be made on a habitual basis.

Based on the interviews, specific practices of the interviewed youngsters to deal with the Covid-19 situation could be identified. Interviewees developed their own individual system of criteria for the defense, and if they successfully considered it, their conscience was easier, and their social behavior felt safer. However, this set of criteria ranged on a very wide scale, the common denominator in young people's reports was that this set of criteria often worked to reassure them, no matter how effective it was actually in terms of protection against the virus. Some interviewees had elements as part of their individual systems of criteria, which have been argued also by experts to help in avoiding spreading the virus such as wearing a mask, choosing the location of gatherings carefully (outdoor gatherings), or avoiding personal contact. Some others were seemingly satisfied for example by just paying attention to not drinking from another person's glass at a party or changing their ways of greeting others – which experts would not regard as doing enough to prevent infection. Closeness to another person was also another aspect that somehow reassured a part of youngsters when meeting that it is less of a problem to meet. This was sometimes related to knowing who the person close to them met in the previous weeks, but not always, seemingly just a kind of trust was allocated to some close friends, irrespective of these factors. Socializing habits were not consistent during the pandemic and their set of strategies also changed over time, but not in proportion to the severity of the virus.

That there is not one uniform response to the preventive measures, but that there were differences in the practices of the youth is in line with what had been found by quantitative research for the Hungarian population (Ipsos, 2020). What our qualitative research could add is show some changes in behavior that quantitative surveys typically did not measure – for example drinking from another's glass, and we could see how even this action reassured some youngsters that they were doing something, or even enough. This points to the importance of conducting qualitative research on this topic.

Based on the accounts, some factors that could have affected the way the students behaved could be discerned. One important influencing factor was their feeling that they did not want to infect others. What we saw that this mainly pertained to older or chronically ill family members. Those fearing to infect certain family members that they were not living with had mainly two strategies: either going to places and postponing meeting

these family members, or not going to social events before meeting these family members for two weeks. As Parfit (1984) argues, within everyday morality it happens often that higher priority is given to helping people with whom we are in a closer relationship than strangers. This, however, causes a problem on the macro level in case of Covid-19. It would be in the interest of society to somehow get people to take responsibility in not infecting general others not just family members. In Hungary, solidarity – willingness to help others, or concern for others – has been argued to be on a lower level than some other countries in Europe, albeit it has shown some increase during the pandemic (Voicu et al., 2021).

Conformity, alignment with friends' behavior was also an aspect that influenced actions, which is in line with Luft's (2020) argument on the situatedness of moral decisions: the same people could either wear or not wear a mask for example based on what the others were doing in their presence. Conformity in some cases caused behavior that on a mass scale would contribute to curbing the virus, in other cases it worked in the opposite direction. It depended on what others were doing in the presence of the interviewees. Other factors that influenced behavior according to the accounts included: the closeness of the relationship with the person whom they were present in a space together with, epidemiological restrictions and rules, and the passage of time and the fatigue it caused as well as getting used to the virus situation over time.

The result that in some cases closeness of an acquaintance led to a higher reassurance for the interviewees that they would not get the virus corresponds to Shamloo et al.'s (2023) findings about individuals not always objectively considering the risks of Covid-19 and that they may rely on the type of relationship. The closeness of relationship may influence the risk perception and preventive behaviors as well. Shamloo et al. (2023) states that this is in line with the concepts 'paradox trust' by Wong and Jensen (2020) and 'unrealistic optimism' by Salgado and Berntsen (2021): closeness of the relationship may inadvertently activate mechanisms that lead to less adherence to recommended preventive behaviors, and individuals tend to be optimistic about their own and close others' risk of infection, which indicates that close others are likely to be treated as self.

Liminal periods can have different phases, and do not necessarily just linearly develop toward more normalization, phases of attempts at normalization can happen with phases getting back toward more disruption (Cui & Chen, 2022). The analyzed pandemic period cannot be regarded as a uniform liminal phase, either, as new situations arose with the different degree of infections and amount of restrictions, as well as the accumulation of knowledge on the virus. During the summer to some degree there was an attempt at normalization, getting back to earlier habits, with the easing of restrictions and drop in infections. In the fall, whilst cases rose, again there was some disruption in the practice that was established in the summer. However, in the fall many complained that they were getting tired of restrictions and being careful. Arguments on self-protection of one's mental health via meeting with others being important surfaced more and became a reference point of some youngsters to justify their actions. At the same time, besides arguments of importance of relaxation, feelings of guilt also surfaced in some instances.

The findings have relevance for public health communication. For example, in order to increase voluntary compliance with measures that are effective in curbing the pandemic, public health campaigns should pay attention to actions that certain populations might feel to be effective, when in practice they are far from being enough (such as drinking

from another person's glass). Campaigns could also implement strategies that foster care for other people who are not family members. The Hungarian public health campaign tried to do this with slogans such as 'Let's look after each other', however there were contradictory messages sent with actions of the ruling party's prominent actors, which somehow did not always work to underscore the message that 'All lives matter'. Campaigns should also target the false positive beliefs that people close to us have less chance to infect us and should have a strategy to deal with pandemic fatigue developing over time.

Limitations of the study include its non-representative nature and the fact that we do not know the exact actions of the investigated young people, we only know what they communicated in their interviews and claimed to have done.

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Digital technology and family dynamics: The 3Rs conceptual model regarding the acceptance and use of digital technology in everyday family routines

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Abstract

The inclusion of digital technology in family life has led to the emergence of new practices of 'being together'. Communication between family members is mediated by digital technology, thus producing changes that can be observed in family dynamics. Eleven families participated in the present study that aimed to analyze family interaction with digital technology. Our qualitative study was guided by two research questions: *How do children and adults use and subjectively assess digital technology in their everyday lives?* and *How do families react to digital technology use and inclusion in their daily family routines?* Referring to the different forms of digital behaviors that a family can manifest in relation to the use of digital technology, we identified three specific family approaches to digitalization: *Resistant, Retained, and Receptive.* The 3Rs family conceptual model regarding the acceptance and use of digital technology includes children's and adults' perspectives and provides a constructivist approach to understanding how digital technology connects all family subsystems and ultimately produces changes in the dynamics and construction of family life and identity.

Keywords: Communication and Information Technologies; digital demographics; Family Digital

1 Introduction

Digital technologies (DTs) have transformed the way we learn, communicate, and work, thus, we can say that these technologies have become an intrinsic part of our lives. In analyzing the effects of DT on the family ecosystem, it is necessary to take into consideration not only the advantages and disadvantages of such technology on the family ecosystem but also the mechanisms that determine these consequences. Aiming to provide a qualitative perspective on how the family ecosystem has been changed by the usage of digital technology, the current paper describes a series of analyses of different aspects such as families' access to technologies, the digital devices that are used, and their modes of con-

nectivity, digital affordability, forms of digital inclusion in family life, and the opportunities and types of technology usage of families. By bringing together children's and parents' perspectives on DT use, we seek to evaluate and understand how the latter are incorporated by Romanian families and how they shape family dynamics and everyday life.

This study is relevant in a context in which the digitization process in all areas of society at the national level is beset by difficulty. The Digital Economy and Society Index (DESI) 2021 ranks Romania twenty-seventh out of 27 EU Member States. The same report (DESI, 2021) indicates that less than one-third of people aged between 16 and 74 have at least basic digital skills (56 per cent in the EU as a whole), while 35 per cent have at least basic software skills (EU average: 58 per cent). Only 10 per cent of individuals have above-basic digital skills. These data reveal a contrast: Romania ranks last in Europe in terms of digital competencies but has almost the highest connectivity speed in Europe – third place (DESI, 2021). As digital technology is being more frequently used by the younger population, the exploration of children's digital world and the digital habitus of Romanian families becomes relevant and fundamental for understanding the role of the family in this digital age.

How and *for what* children and adults use (and subjectively assess) digital technology in their everyday lives are considered two dimensions of the family model of DT use (Livingstone & Byrne, 2018). With the inclusion, expansion, and diversity of digital devices used in the family, there have been changes in what we may call '*doing family*' – the day-to-day act of reproducing the family environment through social interaction among its members (Morgan, 1999; Nedelcu & Wyss, 2016; Lorenz & Kapella, 2020). Various aspects of doing family, like family traditions, daily routines, or other distinctive elements that make the difference between two families, are influenced and shaped by the use of digital technology.

Digital technology use by family members affects the family ecosystem, with some areas being more technology-friendly and others being more resistant to the digitalization process. Therefore, the increasing frequency of digital technology usage at home gives technology an important role in building family dynamics. The use of various digital devices by each family member ultimately leads to a greater variety of digital activities, products, or digital content. The way technology is used may influence the attitude individual family members have toward DT, even in social contexts outside the family (e.g., at school). Several studies (Haddon & Vincent, 2014; Khourochvili, 2017; Baron et al., 2019; Casaló & Escario, 2019) have shown that the use of digital devices is becoming increasingly privatized and mobile. Following the studies in this area, this paper looks at the specific behaviors that family members display when including digital devices in the family environment.

A lot of previous data related to the role of DTs in family cohesion (Francisco, 2015; Gonzalez & Katz, 2016; Marlowe et al., 2017; Madianou, 2019) focuses on the role of digital technologies in the daily lives of transnational families, but less on how the use of digital technologies shapes the daily lives of families whose members stay together and interact on a daily basis. This study emphasizes the effect of the everyday use of technology and how this can change the family routine and ecosystem.

2 Trends in the use of technology in families and among children

Researchers' approach to examining the impact of digital technologies on family dynamics has gradually moved from a perspective that situates technology as an autonomous system that only interferes with some family dimensions to an integralist approach that identifies technology as a constructive part of the family with implications for all levels of the family ecosystem. The fact that digital technology is used actively as part of the daily routine may be seen in the digital activities in which the family engages and that influence family cohesion (Eynon & Helsper, 2015; Romero-Ruiz et al., 2017; Mullan & Chatzitheochari, 2019; Ceipek et al., 2021). Consequently, with the constant dynamic upgrading of technology, the concepts of family and technological change become increasingly interrelated. As a result of the daily use of digital technology in family life, different ways of being, doing copresence, and thereby 'doing family' are carved out (Döbler, 2019; Ducu et al., 2023).

Villegas (2013) suggests that technology use has at least one of two functions: it serves as a medium for independent user activities or as a vessel for socializing and communication. Starting from the idea that communication plays a central role in any family's functioning and the mental health and well-being of each family member (Oltean et al., 2020), new technologies have contributed to new ways of maintaining family communication. By bridging gaps (in line with the understanding of the interaction of social systems) and increasing the sense of social cohesiveness, the use of DT in the family's everyday life highlights the applicability of systems theory in the sense of the latter's support for continuous interconnection among family members. Digital technology has the ability to connect family members in different interactive ways: each family can have a common *active digital experience* (that engages family members in digital activities) or *a passive experience* (by accepting or submitting to digital content concerning family life in the online environment). Digital technology can be seen as driving changes in family life, or, conversely, family members' intentional use of technologies can be understood as mediating its effects (Mauthner & Kazimierczak, 2018). A study from Belgium (Beyens & Beullens, 2017) showed that the co-use of digital technology decreases conflict associated with compliance with the rules of use of DTs.

Any typology of families associated with DT use will be related to the variety of devices that are at the disposal of family members and the motives for the usage of these devices. Koener and Fitzpatrick (2006) argued that technology-mediated familial relationships are associated with the nature of technology use.

The diversity of digital devices and products used in the family can have a *fluid* and *adjustable* character. Fluidity is the ability and possibility of DTs to exert influence through time and space in all dimensions of family life (the same digital device can be used to organize daily activities within the family for communication and leisure purposes). Adjustability is the ability to adapt to interaction and involves factors such as age, context, or individual needs. Starting from these observations, the variety of digital technologies used by children and adolescents differs from that used by adults. The differences in terms of devices that are used also highlight the distinct aspects of the intentions and motivations that a family member may have during their engagement in a digital activity.

Regarding how children across Europe engage in digital activities, the most common activity in the online environment is related to leisure and entertainment, namely, watching content from the video-sharing platform YouTube (Martínez & Olsson, 2018; Ofcom, 2020; Konca, 2021). Digital touchscreen devices, such as smartphones and tablets, are preferred by children and are used more frequently than static devices, such as computers and television (Ofcom, 2015). For both adults and children, DT use can be motivated by the need for socialization and emotional externalization (Ellison et al., 2014; Vermeulen et al., 2018).

Parental flexibility may motivate the use of technology in the family by allowing DTs to be used as a reward for children and to regulate their behavior (Lwin et al., 2021) or for educational purposes (Selwyn & Facer, 2014).

At the national level, Romania has been identified as a poorly digitized country compared to Western European countries in recent years (Radu, 2019; INS, 2019). However, an upward trend can be identified in the digitization process compared to previous years, with the access of the general population to mobile broadband increasing in 2020 to 78.2 per cent compared to 64.2 per cent in 2019 and 57.3 per cent in 2018 (INS, 2020). In addition, social media is seen as an important source of information, with more than two-thirds of Romanians getting their news from Facebook, YouTube, and other social media platforms (Holdis, 2019; Radu, 2018). Moreover, it seems to be a tendency among families to use more interactive forms of DTs to replace television (Holdis, 2019, p. 83).

In an analysis of the digital life of Romanian families, Velicu and Mitarcă (2016, p. 4) showed that smartphones are more often used by parents, who consider them unnecessary for young children, while children migrate more towards the use of tablets. A similar result has been reported in other countries as well (Chaudron, 2015).

3 Family typologies regarding the use of digital technology in daily family life

Families' adaptation to the new digital age has been and continues to be challenging. The decision-making process related to the use of technologies in the family proves to be a complex one that is influenced by internal factors (such as the dynamics of family relationships, family values and beliefs, the family environment, and parents' perception of and motivation to engage with new technologies), contextual factors (access to technology, socio-economic status of the family, socio-cultural context) and socio-demographic variables (Austin et al., 1990; Van Dijk, 2017; Estacio et al., 2019). In addition, the various communication options mediated by DT that can be used by family members for interaction and the transition from 'conversational communication modes' to 'connected presence modes' have caused significant changes in intergenerational communication (Licoppe, 2004).

Concerning the importance awarded (and increasing frequency of) technology use by young people, keen to be accepted within their peer groups, families are often burdened by the latter's excessive use. The inappropriate use of convenient digital technology solutions by elderly members may also be an issue (Trilar et al., 2018). Seen by stakeholders as potential 'digital champions', young people can influence *gatekeepers'* perception of DT

use and the frequency of daily use of digital devices (Eynon & Helsper, 2015). The democratization and adaptation within the family of new digital methods of communication, leisure, and organization may come to replace specific patterns of family functioning.

For today's families who are 'the shelters' of digital natives, the concept of *closeness* and *togetherness* transcends time and space – a person can be in the kitchen with their mother while she is preparing dinner, yet at the same time with their aunt – on vacation in another part of the world – via a smartphone. Thus, through DT usage, the perception of distance and space changes, family ecosystems are strengthened, and new interaction scenarios and relational patterns emerge.

To understand how technology can shape daily family routines, the way it is used and its purpose must be considered. Most studies that have defined specific typologies of the use of DTs within the family and how the family structure is ultimately influenced have as a central element the theory of parental mediation (Valcke et al., 2010; Clark, 2011; Schaan & Melzer, 2015; Wagner et al., 2016; Rodideal, 2020; Eichen et al., 2021). The family dynamic is largely influenced by the parent-child relationship and the parent's role as *mediating* between child protection and ensuring access to technology (Harrison, 2015), in line with the norm of acting in the child's best interest (Livingstone, 2016; Alkhallouf, 2021).

Affected by specific socio-demographic factors, which differ from family to family, the vulnerability that may arise because of these contextual factors involves the issues of children's safety online and the harmony of the family ecosystem. Too much time may be spent using devices, with consequences for the psychological development of young children (Lenhart et al., 2015; Olsen & Pace, 2015; Kardefelt-Winther, 2017; Robidoux et al., 2019; Bajc et al., 2019; Hollis et al., 2020), the social-emotional lives of older children (Hatzigianni et al., 2016; Radesky et al., 2016; Suhana, 2017; Betts & Spenser, 2017; Goagoses et al., 2020; Sharpe, 2021; Bohnert & Gracia, 2021), in terms of accessing inappropriate or inaccurate content in terms of the users' capacity to understand (Livingstone et al., 2011; Sprung et al., 2020; Stoilova et al., 2020; Tiwari, 2020; Casillas-Martín et al., 2020) or in the less competent use of digital devices (Porat et al., 2018; Nikken & Opree, 2018; Fau & Moreau, 2018; Chaudron et al., 2019).

Several studies have shown that parents' misunderstandings about why children engage in some digital activities are contentious and generate conflict (Chatterjee & Yatnatti, 2020; Beneteau et al., 2020; Freeman et al., 2020). Therefore, understanding how technology use can shape family practices can contribute to minimizing the intergenerational gap (Prügl & Spitzley, 2021).

4 Methodology

The research described here aimed to explore how the lives of Romanian families are shaped due to technological transformation. In seeking to achieve this goal, and based on the previous literature, the study involved the analyses of six thematic dimensions: 1) Knowledge about and subjective assessment of digital technology by children; 2) Know-

ledge about and subjective assessment of digital technology by adults (parents); 3) Forms of use of DTs by family members and reasons for using them; 4) The presence of the family in the online environment (displaying the family on social networks; use of various digital products within the family to support and improve the daily routine – e.g., online shopping, paying bills, etc.); 5) The diversity of shared digital activities carried out within the family – co-activities and co-presence; 6) Family engagement in sustaining behavior that supports digital technical needs (vertical parent–child or horizontal child–child).

Two research questions guided the study: 1) *How do children and adults use and subjectively assess digital technology in their everyday lives?* and 2) *How do families react to digital technology use and inclusion in their daily family routines?*

4.1 Instrumentalization

The study used a participatory research approach involving *photo-elicitation interviews* (PEIs) with children and parents. PEI is a method of interviewing used in visual sociology and other fields of social research characterized by using graphical images to elicit comments on specific topics (Harper, 2002; Epstein et al., 2006). Photo elicitation is a participatory research technique that allows researchers to analyze participants' responses to images that are shown during the research process. Within photo elicitation, photographs may be researcher-produced, participant-produced, or co-produced by the researcher and participant (Lapenta, 2011). In our case, the images were produced by the researcher, allowing children to engage better in the research interview and actively contribute to the research process. Using images for increasing involvement by elicitation has proved useful in the past (Harper, 2002; Clark-Ibáñez, 2004; Epstein et al., 2006) in terms of the method's ability to maintain children's interest. Digital images ('show cards') that included various everyday scenes (e.g., a family meal, group play, and adult-child collaboration) associated with the digital lives of individuals and the family were developed and used to encourage the discussion of daily activities or present a story about individuals 'digital experience' of DTs use in the family context. PEI are a relevant approach for obtaining emotional and cognitive information about children's and young people's digital lives and exploring the intriguing subjectivity brought forth through the visual metaphors regarding the assessment of the role of DTs in daily family life.

In total, twenty-six semi-structured interviews were conducted (eleven families). In order to compare the perspectives of family members regarding the use of DTs, at least two members from each family were interviewed (of which one was a child between 5–6 and 8–10 years of age, the second was a parent, and the third was either the other parent or another adult or child from the family). The interviews with family members were conducted separately, without other family members being present. To ensure the comparability of the perspectives, the interview structure was similar for children and adults.

The main aspects of the interview guide are summarized in Table 1.

Table 1 Content of the interview guide

Interview guide content	**Research interest**
Introduction: interviewer, project, expectation, open questions, consent form.	Participatory research techniques
Individual use of DTs and apps: *Show cards with devices and apps are a memory aid*	DTs use and assessment, leisure time
ICT use of family members individually and together (e.g. communication about or via DT, digital literacy and intergenerational differences)	Family practices Intergenerational difference
Negotiating ICT use within the family	Rules negotiations and conflicts.
Prospective change: "What if…?" and "What would you like to have?"	Assessment effect Personal future
Questionnaire (for adults only)	Socio demographic information about the participating families

Source: Generated by the authors

Additionally, adult respondents completed a short standardised questionnaire about the following aspects:

- Age and gender of respondent
- Size of family/number of (step-)children;
- Number of people in household
- Age of household members
- Educational background
- Occupation
- Financial situation

The questionnaires were applied to each family, so they also reflect the children's situation.

4.2 Data collection procedure and sampling characteristic

Data collection followed the methodology developed throughout DigiGen – EU Horizont 2020 Project, whereby a set of twenty show cards were used. These cards were developed by the Oslo Met team and consortium members of DigiGen.

The show cards used in the data present study are connected to the digital lives of children and families as some parts of them illustrate devices and/or applications commonly used in the digital world and can be used to explore ownership and children's knowledge about these devices. The second category of show cards refers to a series of different situations/events related to digital life. Examples of images from this category can be consulted in Figure 1.

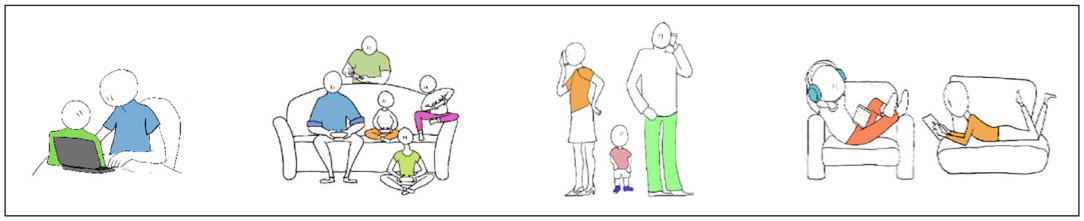

Figure 1 Examples of show cards.

Source: DigiGen field materials.

Scene 1: An adult and a child are sitting in front of a laptop. They are both looking at each other. (Could be homeschooling, research, Skype…)
Scene 2: Three children (potentially siblings) and two adults are sitting on a couch and playing together (the research participant is free to say what they think the people in the picture are playing).
Scene 3: Two adults (maybe parents) talking on the phone with a child between them.
Scene 4: Two children are sitting comfortably on different sofas. One of them is listening to music, and the other is reading.

The sample consisted of eleven families, including twelve children and fourteen adults. The families participating in the study were selected through a snowball sampling procedure, the starting point being four families with different social statuses from Cluj County, North West region of Romania. We tried to contact families and children with different socio-demographic backgrounds (see Table 2). Strategies used for recruiting participants were a mix of letters taken home from schools (an information letter regarding the research project was sent to several schools) and indirect contact using the social networks of the interviewer. Participants were selected based on the same specific criteria, and ideally had one or more younger siblings.

4.3 Data analysis

The first stage of the data analysis process was the completion by the interviewer of a 'Theoretical and Methodological Memo' – a table structured into five parts that condensed both the technical aspects of the research and the dimensions related to the thematic analysis. The five parts of the Memo required specific information on: (1) *Before the interview* – the recruitment process; relevant conversations outside the interview; (2) *General information about the interview* – data, name of interviewer, institution, contact person/gate keeper, location of interview, duration, age of children (5–6 or 8–10), gender; (3) *Meta information about the interview* – seating arrangements; observations about family environment; reflections on dynamic between interviewer and respondent; (4) *Interview content* – details about interview content, introduction, (Individual) ICT use: devices/apps, how, for what, how often, where; ICT use of family members: devices, apps, how, for what, how often, where, when; conflicts and arguments amongst family members about ICT use; negotiations within the family, rules, development of rules, strictness and exceptions; ICTs

in daily family life: advantages and disadvantages; prospective changes; and (5) *Methodological reflection* – What worked and what did not? How did formal (e.g., setting, recruitment, communication, additional materials, question formats/tasks, interaction) and content-related aspects contribute?

All interviews were audio-recorded and transcribed verbatim. Data were analyzed using qualitative thematic analysis performed in NVivo 10.

Table 2 Socio-demographic data related to sample of children

Child			**Interview partner**					**Educational background of parents**	**Area**			**Family form/ living arrangement**
Age	**♀**	**♂**	**Mother**	**Father**	**Sibling (age)**	**Grandparent**	**Aunt/uncle**		**urban**	**suburban**	**rural**	
5		✓	✓			✓		H	✓			Multi-generational household – grandparents in the same house
5	✓		✓					H	✓			Divorced parent, child lives with mother
6	✓		✓					H			✓	Two parents with children
6		✓	✓	✓				H	✓			Two parents with children
6	✓		✓	✓				H	✓			Two parents with children
6	✓		✓		✓ (9)			M			✓	Two parents with children
9	✓		✓					L		✓		Divorced parents. Living conditions are poor, below normal/decent living standard.
9		✓	✓					L		✓		Divorced parents, child lives with his stepmother. Living conditions are poor, below normal/decent living standard.
10	✓		✓					L	✓			Two parents with children
8		✓	✓	✓				H	✓			Two parents with children
9	✓		✓		✓ (6)			M		✓		Two parents with children
8		✓	✓					H	✓			Two parents with children

Source: Generated by the authors

Note: Educational background of parents: H = University or similar; M = secondary education granting access to tertiary education; L = below secondary education not granting access to tertiary education.

4.4 Ethical considerations

Research ethics approval was requested and obtained from the Ethics Committee of Babeș-Bolyai University. In order to comply with research ethics, the following materials were drafted, distributed to the participants, signed, and collected: *Information leaflet for guardians* – general information about the project, research questions, what we need from them, time frame, and contact details; *Consent form from guardians and information leaflet* and *Consent form for children.* The consent form for children was created to be child-friendly and included icons with a variety of digital devices (e.g., Facebook, TikTok, Nintendo, computer, smartphone).

5 Results

The sample distribution allowed for an in-depth analysis of the specific contexts and circumstances that shape the children's lives and growth. However, for this sample, the analysis of the family background and living environment offered only limited insights. In line with the gap in the literature regarding the impact of digital technologies in the everyday lives of families and the fact that family identity is shaped by technology-mediated co-present activities, triangulating perspectives within one family unit and comparison of the most relevant topics mentioned by family members led to six thematic units being identified. Based on the Memo structure, the data analysis process focused on identifying the use of DTs by individuals and in the family (e.g., communication, leisure time, and organization of daily life), with special attention paid to interactions with and through digital technology (type of activities); negotiations, rules and conflicts around DT use (e.g., privacy, time); and the assessment of DTs – the advantages and disadvantages of the latter from the perspective of individuals and the family with a focus on harmful versus beneficial effects on the family system and individuals.

The results are structured and presented by analyzing the six thematic dimensions of qualitative analysis according to the research question: *How do children and adults use and subjectively assess digital technology in their everyday lives?*

The eleven families were very different in terms of the possession of and access to technological devices of children, from children who share one smartphone with three other siblings (F1) to children who have two or more personal digital devices (F8).

Starting with an examination of the child's degree of familiarity with a particular digital device or apps, then the frequency with which the devices and apps are used, most of the children recognized both the devices and the applications shown in the images on the first series of cards. The children predominantly access the internet at home and through mobile devices. As for the frequency and diversity of digital technologies used by children, one of the most recognized and commonly used applications is YouTube, especially for children five to six years old, and TikTok for children eight to ten years old, the latter (TikTok) being perceived as a platform that offers the opportunity to manifest social status. At the same time, children are aware of the economic potential of this application: the opportunity to earn an income if you can produce attractive content.

Interviewer: What do you like most about the digital world?

F1_1: Watching TikTok, second place is YouTube.

Interviewer: And how do you watch TikTok?

F1_1: I enter it.

Interviewer: On what?

F1_1: On the phone. (RO-1-1)

***

There are challenges that you can do, and if you have a profile with many followers, you can make money from views, but you have to know how to dance or be very different. (F11_2)

The devices most used (every day) are smartphones and smart TVs. Smart TVs are the main device for watching movies with family or specific videos on YouTube as well as devices for 'background noise'. Other less used devices (once every two or three days) are laptops and PlayStations, while less used apps are Roblox and Snapchat. However, PlayStations are the devices most desired by children, followed by smartwatches, but only two of the children who were interviewed have a console (F8_1 and F9_1). It is worth mentioning that girls consider the PlayStation to be an interesting device only for boys: 'Even though the games on the PlayStation are more for boys, sometimes I play with my brother' (F8_1).

The children use digital technology to meet some personal needs (socializing, entertainment, play). The most common activities which children engage in through digital technology are games, watching videos (tutorials of how other children play games), or just being 'online' or 'on TikTok'.

For children, digital technologies, particularly smartphones, represent a space for entertainment. Because most children are allowed to use these devices independently and generally without close monitoring, smartphones are a space of freedom and escapism from the 'world of adults'. Some of the children use specific applications, depending on their usefulness. For example, a young girl told us that she most often used TikTok for entertainment, Viber for socializing with classmates, and Roblox for virtual community gaming. For socializing with family members, she also uses applications such as Messenger and WhatsApp.

Regarding parents' use of technology, the most used digital devices are smartphones and laptops. The adults who use laptops associate them with the workplace, considering them work-related tools, while smartphones are mainly used in private spaces to meet personal needs, such as for entertainment and communication with family members and friends. The digital apps adults use most are Facebook, Instagram, apps for online shopping, and WhatsApp. Although adults use technology for personal and work-related communications and interaction, they also use technology to keep in touch with friends and extended family members.

Interviewer: And what kind of information do you look for on your laptop?

F4_2: Firstly, information related to school, professional, scientific things, and on the other hand, I look for news, press articles.

As mentioned earlier, the use of digital technologies is based on specific user needs. We have identified three areas where which adults most frequently use DTs: (1) For online shopping (F4; F8; F11). It is worth mentioning that those who use various applications for online shopping stated that they buy only non-perishable items, with food products being totally excluded from the online shopping list. (2) For communication and socialization purposes ('Facebook helps to maintain relations with all the family. For example, now I have a baby and I can't go to my mother's. I can call her on Messenger and I can see her any time' (F2_2)). (3) As a form of leisure, adults mention that they use YouTube, and some mention shared activities like gaming ('…for entertainment I prefer YouTube as an application, and the mobile phone as a device' (F7_2)).

In contrast to the results obtained in this study (that children predominantly access the internet at home and through mobiles), Chaudron (2015) research indicated that tablets were children's favorite devices at that time. This result was also acknowledged by Livingstone et al. (2015), who concluded that tablets are popular and important in young children's digital lives, particularly for leisure purposes. In the same age range, we highlight a change regarding the degree of children's independence related to using technology. While previous studies (Livingstone et al., 2015) showed that in situations when children used digital devices creatively to take photographs or generate video clips, parental mediation was still required to edit and complete the process, yet now we can talk about a *reverse support process* regarding the use of digital technologies. In most cases, especially in the case of socially vulnerable families, children support their parents with various DT-related activities.

How do families react to digital technology use and inclusion in the daily family routine? The behaviors in which children engage while using digital devices at home are related to pre-existing models of DT use in the family. Therefore, the extent to which digital technology is included in the family environment/space may influence the impact and changes in family dynamics.

The diversity of digital devices used by each family member, forms of engagement, and the amount of time spent on or with technology interfere with the domestic context, and also relevant are the number of devices the family owns, where they are located, family routines, and rules. Classification of the digital behavior of a family as a unit, in addition to being determined by the individual perspectives and approaches of each member, involves vertical (parent–child) and horizontal perspectives (child–siblings). Children are active observers of the digital behavior in which their parents are engaged and manifest interest in their siblings' digital activities.

Combining children's and adults' perspectives about the use, intentions, and motivations for using DTs, we developed the 3Rs family typology model (see Figure 2), which includes the following patterns regarding the acceptance and use of technology in family life:

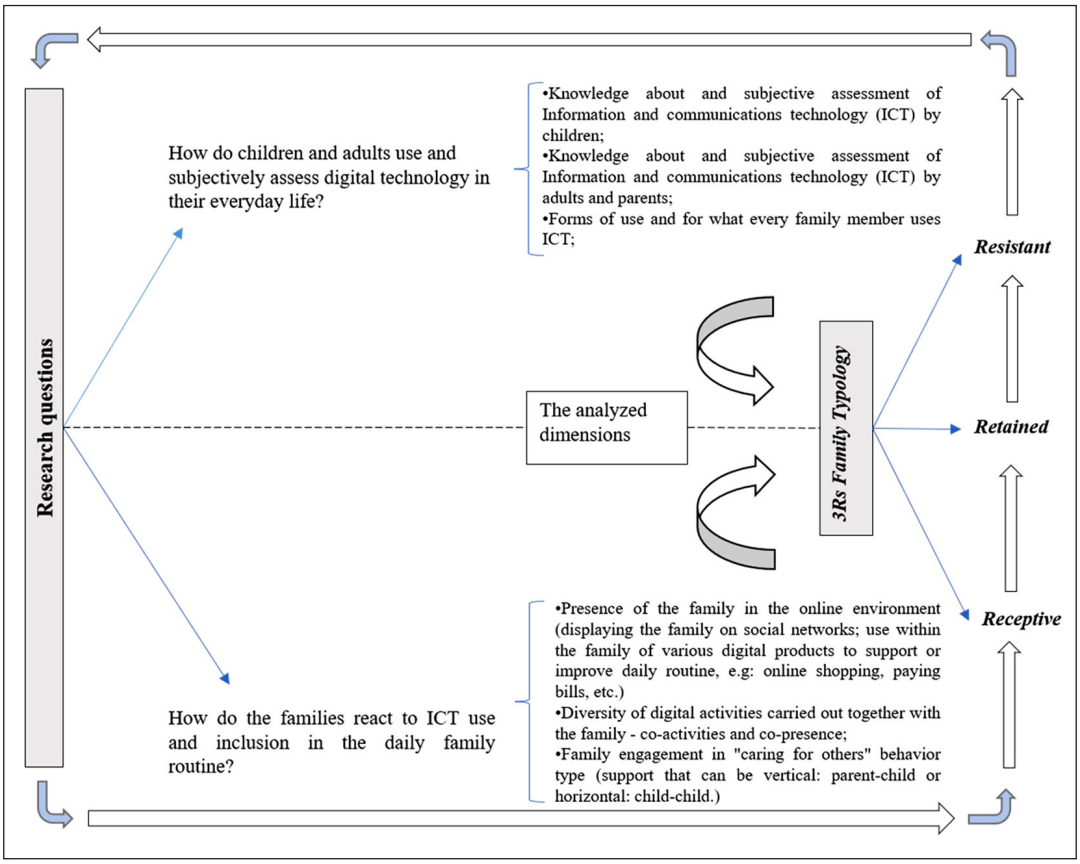

Figure 2 The 3Rs conceptual model regarding the acceptance and use of digital technology in day-to-day family life

Source: generated by the authors.

Resistant families consider that digital technology negatively affects family dynamics and engage in behaviors resistant to digitization: they use a less diverse set of digital devices, DT-mediated family activities are not extensive, and they prefer outdoor activities that they consider 'quality time with the family'. These families use technology at the minimum necessary level; the main goal is to keep in touch with each other and to access information and entertainment. On average, these families have between one to three digital devices (F1, F2, F3, F5): 'Technology helps us a lot to organize our day-to-day life, family life' (F1_2).

The communication function of DT is often seen as an advantage by parents and beneficial for maintaining family connections and facilitating easier relations between members. Seeing others was especially valued when in-person contact was problematic: '… now I have a baby, and I can't go to my mother's. I can call her on Messenger and I can see her all the time' (F2_2).

In this classification system, particular attention is paid to one Roma family. The children in this family reported having limited access to technology and use of a limited variety of digital devices. These devices were shared among family members, including children and parents and older and younger siblings. The negotiation of device usage for home-schooling proved to be challenging in such families. Additionally, poverty added to the difficulty and responsibility of maintaining the devices due to a lack of continuity in access to electricity. While social discrepancies between families are not the primary focus of this study, the confounding effects of the digital divisions between families resulting from their social background are acknowledged as a limitation of the current research.

It is interesting that in families with several children, including an older brother, the little ones know many details about the devices and applications from their siblings. For example, F7_1 knows about Facebook, WhatsApp, TikTok, Spotify, Instagram, and smartwatches from his sister, and F6_1 knows about sound-editing software from her brother:

> Interviewer: What else can we use a laptop for, except for online school and watching YouTube?
>
> F6_1: We can make music with it using a special program.
>
> Interviewer: Create, or listen to?
>
> F6_1: To create. My brother has a program named 'FL studio', and he uses it all the time. He likes music a lot, but my mother doesn't like what she hears… (F6_1).

A reverse learning process can be observed when children barely nine or ten years old show their parents how the devices work and help them find content of interest.

There is no real system for determining how much time children can spend on their digital devices in the case of the children living on the landfill due to the inability to charge their devices.

In the case of resistant families, we noticed that there are some strict, clear rules about DT use regarding the time permitted for using digital activities. In these families, parents usually specify the consequences they take when the rules are not followed.

> She (the daughter) is not allowed more than one hour on the tablet and is only allowed this after doing her homework. Sometimes, after sitting on the tablet for one hour, she goes and turns on the TV. If I notice, I go and turn it off (F6_2).

Children often internalize and accept the norms that are set by parents: the daughter of the aforementioned mother thinks the rules are there for the whole family and that it is appropriate to restrict the use of DTs if one behaves badly (F6_1).

One method the families use to promote compliance with rules is promptly reacting to disobedience, while another is providing rewards for compliance: 'Two hours a day [access], but if I abstain from Monday to Thursday, … [then I have] Friday, Saturday, and Sunday unlimited' (F9_1).

Retained families consider that technology can influence family dynamics 'as much as family members allow it' (F9_3); the behaviors they engage in are related to negotiating and finding a balance between the family's online and offline activities. With this type of family, we see a variety of digital devices: in addition to smartphones and TVs, they also use computers and laptops. On average, these families have between one to five digital devices (F4, F6, F9, F10). Members of such families are insecure about using multiple digital

devices. This uncertainty is linked to the negative impact they could have on family cohesion. However, they use a wider variety of digital products, considering technology to be a suitable alternative to leisure. In these families, DTs are used for communication and participation in social life.

This category includes families with no explicit rules regarding when technology may be used, but adults expect children not to look at a specific type of content. The behavior in which adults engage in such situations is often not consistent and is determined by unforeseeable factors from the perspective of the children.

From analyzing family participation in social media, we identified two approaches related to motivational aspects. Namely, that technology can meet the need for belonging to a small and homogeneous group (such as a family) and the need to be a part of a social group and be aware of social events. Through fostering online presence and including technology in family life, DT contributes to how families are organized and live together and has significantly transformed the latter during the last two generations, noticeably impacting relations between family members. The use of DT for family activities contributes to maintaining some shared time with family members, especially between children and parents, including spending time together for entertainment. The devices most commonly used for shared activities are smart TVs and smartphones, while the most used apps are Netflix, HBO, Messenger, and WhatsApp.

> Interviewer: Do you watch movies or YouTube videos on your computer or laptop?
>
> F6_2: No, the screen is too small. We use our laptops and computer more for news or specific information. For movies, we use smart TVs (F6_2).

F7_3 believes that watching a movie with his family is a technology-mediated activity that involves spending quality time with the family. Other online activities are 'just a waste of time'.

Regarding participation and social cohesion, DTs are used to access information, read news, and actively participate on social platforms in all kinds of discussions about social and political issues. For this, the digital device most commonly used is the smartphone, and the most often used applications are Facebook, Instagram, email, Pinterest, and YouTube. Likewise, adults use DTs to spend time with friends. For this, they use devices such as smart TVs. To stay aware of musical trends, they use YouTube.

> Ooh… Facebook! The thing I wake up with in the morning. I have an account, and I log in whenever I have free time. I find it useful. I found a lot of high school friends there, and I can see pictures of all my colleagues (F6_2).
>
> ***
>
> I admit that I don't really use all these devices. I mostly use Facebook and WhatsApp for communication; I have all kinds of groups there that I am part of. I talk a lot through video chat with some of my friends from other countries (F8_2).

In the case of retained families, even if specific rules are established, there is no continuity with their enforcement. We found indications of violations of the rules in these families, with some children acknowledging that at least they manage to break the rules sometimes: 'I secretly disobey them [the rules] sometimes' (F5_1).

Receptive families use digital technology frequently and own various devices and applications. On average, these families have between one to eight digital devices (F7, F8, F11). They consider technology to be something necessary for the family, making daily tasks easier. There are no rules regarding the use of DT. These families usually take a passive approach to DT usage regarding time spent on devices and the content of digital activities. This passivity related to rules does not necessarily mean a lack of digital education. Some parents may have difficulty managing the limits of their children's behavior. In other cases, families are aware of risks and explain them to children. Also, they seem to be ready to intervene if they consider that children are being exposed to risky situations. One explanation for the lack of rules in these families may be parents' high degree of confidence in their children's ability to understand dangers once they have been explained.

An interesting finding is that children from these families in which there are no rules consider that it would be good to have some rules for both children and adults. For example, in family F11, there are no rules, but the daughter thinks that some rules would be very useful. For example, she would ban the use of phones in the morning and the evening as this should be family time. Parents should play with their children, talk to them, and cook together.

> Interviewer (discussing the role play involving playing on the phone at bedtime): Do you think there should be any rules?
>
> F11_2: Yes, if I could set some rules, I would forbid family members to use the smartphone in the morning and the evening and to use devices only a maximum of two hours a day.

Another category includes those families that involve children in setting rules. In the case of family F8, the parents say that they impose no strict rules and give the children the opportunity to make their own decisions about using technology. The father claims that 'when rules are established, they are established together with the children.'

> The children's opinions matter, and we really take them into account. We have noticed that if you value their opinions, it is very easy for them to respect certain rules. This way, there are no conflicts (F8_3).

With all parenting types, punishment for breaking the rules is usually imposed, commonly in the form of longer or shorter restrictions on preferred DT, with obvious exceptions in families where no rules are imposed.

DT increasingly offers parents more and more opportunities to monitor children, reshaping how control and autonomy are negotiated within families. Negotiations and conflicts take place in two dimensions: vertically (child–parent/adult) and horizontally (child–siblings).

From the child's perspective, the most common causes of conflict related to the use of digital technology in the family are:

– Sharing one digital device with siblings

> Interviewer: How do you get along with your sisters when using the smart TV? Do you argue over it?
>
> F3_1: We sometimes argue because everyone wants to watch different things, but the smaller children win because if they don't get to watch what they want, they start crying (F3_1).
>
> ***

> Interviewer: How do you get along with your siblings when using the phone? Do you argue over it?
>
> F1_1: Yes (because they only have one phone, and everyone wants it). Everyone should have their own phone.

This girl's solution for making everyone happy was not imposing rules and negotiations; instead, she would provide smartphones for all the kids in the family, not only for adults.

In the case of family F11, members are split about the content of DT use according to their gender: the sisters sometimes agree to watch a vlog together as they have some common interests, but the son, the youngest child, prefers cartoons and cannot agree with the girls about content. If the phone is taken away from him, he starts crying, screaming, and hitting out. In such situations, the mother intervenes, usually returning the smartphone to him and telling the girls that they are older and must understand him.

– Non-compliance with rules set by parents: children spend too much time on devices or do not keep a minimum distance between them and the device.

> I have arguments with my mother because I watch things for older people, and sometimes when I sit too close to the TV while playing on the PlayStation. If I stay too close, I will have to wear glasses, and I don't want that (F8_1).

According to the adults, the most common causes of conflict related to the use of digital technology in the family are somewhat similar to those explained by children:

– Children have only one digital device that must be shared with the other siblings. In such situations, the parent always offers support and defends the younger child (F1; F2; F3; F11).

– Accessing inappropriate digital content

> Sometimes she watches YouTube videos from which she learns nothing, or she watches others to see how they play Minecraft. I tell her to turn off the phone because it annoys me when I see what she's looking at (F6_2).

– Spending too much screen time/time on devices (most parents complain that children spend too much time on devices)

> Yes. Because they are staying on the phone too long, and it's not good. My son often stays up until three or four in the morning (F2_2).
>
> ***
>
> F4_2: He learns a lot from cartoons, like an encyclopedia. A lot is learned from cartoons; it is a good opportunity to develop vocabulary, to access accurate information about the world. On the other hand, there is also the risk that the child will end up watching films that are not suitable for him. For the kids, visual impact is very strong. Inappropriate images can cause all kinds of emotions, such as fear and anxiety.

6 Conclusion

This article has explored the different ways family members engage in various behaviors related to the use of digital technologies in daily family life. The 3Rs family conceptual typology addresses the acceptance and use of digital technology by combining children's and adults' perspectives and provides a constructivist approach to understanding how digital technology changes the construction of family life and identity. Our results indicate that the intentions and motivations for using digital technologies are influenced by the capability of digital technologies to satisfy human needs. Technology is becoming a central element of the organization of the daily activities of family life, with a mediating role (Nag et al., 2016).

Although most of the activities mediated by digital technology occur on a personal/individual level, children appreciate and consider it important to engage in shared activities with other family members.

Within the family, access to technology and the frequency of use of digital devices are associated with the roles individuals occupy in the family. Possession of a personal smartphone and relaxation of rules regarding the use of DT can be associated with reaching maturity. This is seen in parents' commitment to buy children a personal smartphone when they 'are older'. Being an active part of children's lives, digital technology requires and intensifies the need for parental mediation in the child-technology relationship. Parents differ in their attitudes to the necessity of DT and their confidence in using digital technology, as well as in their ability to set limits consistently and with gentleness to ensure the safety of children. In the long term, the rules set by parents and the practices used to negotiate these rules will become the basic principles to which children refer when accessing and using digital resources.

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BOOK REVIEW

Methods of constitutional reasoning in six CEE countries

Tóth, J. Z. (Ed.) (2021). Constitutional Reasoning and Constitutional Interpretation: Analysis on Certain Central European Countries.
Ferenc Mádl Institute of Comparative Law; CEA Publishing

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The comparative approach to constitutional interpretation and reasoning has seen considerable developments over the last decade. While earlier comparative studies within the field mostly focused on concepts and institutions, and generally adopted a normative perspective, the launching of the CONREASON project (cf. Jakab, Dyevre & Itzcovich, eds., 2017) in 2011 has been an important step towards a both more descriptive and methodologically better founded examination of constitutional argumentation. The project has since found several followers (see Kelemen, 2019, n. 1, for references), including those focusing on specific regions (CORE Latam, cf. Fröhlich, 2020, and Nordic CONREASON). This volume is a further addition to this growing body of scholarship. The main question of the comparative study presented here is whether there are any specificities in the reasoning and constitutional interpretation of Central and Eastern European constitutional courts. The reader finds many valuable insights and lessons on the way to an essentially negative answer.

The structure of the volume is far from being intricate: a substantial introductory chapter (by Zoltán J. Tóth) is followed by country studies analysing samples of judgments from the Slovenian (Benjamin Flander), Hungarian (Adél Köblös), Czech (David Sehnálek), Slovak (Katarína Šmigová), Serbian (Slobodan Orlović) and Polish (Piotr Mostowik) constitutional courts. The selection criteria are explained in the introduction: the authors of each study have selected thirty judgments dealing with fundamental rights issues from the period 2011–2020, which contain references to the case law of the European Court of Human Rights (ECtHR) and the Court of Justice of the European Union (CJEU). The authors take stock of the interpretive methods used by the respective courts and identify the types of arguments used in the reasoning of the judgments, as well as the weight attributed to single types. As a next step, they do the same with the ECtHR and CJEU judgments cited. That makes it possible to characterise the jurisprudence of national constitutional courts, and also to compare it with that of the European courts, albeit with certain limitations.

Most of the limits have, of course, been taken into account by the researchers, and the analytical methods have been adapted to these to some extent. One example is the choice of cases: the judgments delivered in the five-year period (2016–2020) initially envisaged did not contain a sufficient number of references to European case law, and it was therefore necessary to consider the courts' jurisprudence over a longer period. Another

example is the limitation of the number of references examined: the authors selected one ECtHR or CJEU judgment from the references of each judgment, which they considered to be of decisive importance for the reasoning, to reconstruct European case law. That latter has been ultimately limited to the characterisation of the ECtHR case law, since national constitutional courts, at least in the cases examined, very rarely refer to CJEU decisions.

However, two important limitations of the comparison remain unreflected in both the introductory chapter and the individual studies.[1] One of these is temporal, the other is perhaps best termed spatial. As regards the former, the problem is caused by the greater temporal dispersion of ECtHR judgments: while the selection of the jurisprudence of some constitutional courts is limited to the 2010s, some of the European decisions cited here are, quite naturally, from previous decades, in some cases even from the 1970s. That may distort the observation in terms of the content and doctrinal background of the decisions, and the interpretive and argumentative technique, which is of primary importance for this research, is presumably even more exposed to changes from one period to another. To put that into context, one would need an analysis of the ECtHR judgments independent of those citing them. The reason for the selection seems clear: the juxtaposition of judgments related in their substance makes it easier to take account of the specificities of the reasoning. It is important to note, however, that ECtHR jurisprudence, as it emerges from the studies, is not 'identical' to itself in the same way as that of the individual constitutional courts.

The other, more important limitation is the use of European case law itself as a basis for comparison, since the ECtHR and, to a lesser extent, the CJEU judgments are presented in the research as representing 'Western European fundamental rights jurisprudence,' which is used to highlight the characteristics of 'Central and Eastern European fundamental rights jurisprudence.' Here again, the reasons for this choice are quite obvious: beyond the manageability of the material, there seems to be no doubt that the European courts are more representative of a common (Western) European fundamental rights thinking than national constitutional courts. However, the extent and nature of that representativeness could (and perhaps should) also be the subject of a separate analysis.[2] It is much less clear that the *style* of Western European constitutional case law can be summarised in any way.

But what can we say about Central and Eastern Europe? Are there common features in the reasoning and interpretative practices of the constitutional courts examined here? According to the editor's summary, the most common one is citing the courts' own decisions, with the Serbian sample as the single exception, only the lesser part (14 judgments) of which contained such references. Other methods of reasoning are much more varied, perhaps only contextual interpretation (broadly understood) being clearly common in the jurisprudence of most constitutional courts. However, a look at the ECtHR decisions cited makes it clear that there, too, both the predominant use of case law and the frequent use of contextual interpretation can be observed. The summary further points to the similarity of the proportionality tests used to assess fundamental rights restrictions, as well as the primacy of the rule of law and the fundamental values of democracy in the jurisprudence

[1] Apart from the less than complete coverage of CEE countries. Further editions, it is hoped, can expand the list of national courts examined. See, e.g., Sinani (2022) for a recent survey of North Macedonian jurisprudence.

[2] See Molnár (2022) on the impact of ECtHR jurisprudence on the interpretive practice of the CJEU.

of both national constitutional courts and the ECtHR. Whether all that can be described as 'methodological convergence' is perhaps debatable, but it seems certain that in the field of reasoning with human rights and constitutional interpretation, Central and Eastern European constitutional jurisprudence is not separated.

Finally, two important, albeit less pronounced, merits of the volume deserve mention. The first is the theoretical and methodological overview in the editorial introduction, which, despite its brevity, stands out for its thoughtfulness and its extensive overview of relevant scholarship. This makes it suitable both for educational purposes and a starting point for further analysis. The second is, paradoxically, the very subject of the research: the examination of the reception of ECtHR case law in Central and Eastern Europe. In the presentation of the results, it necessarily remains in the background, since being the criterion of selection, references to it cannot be regarded as a common feature. That notwithstanding, the observations concerning it are significant and could be the basis for further research, especially if one wishes to examine such references by national constitutional courts from a diachronic perspective, focusing on possible directions of change – as it appears in some of the chapters.

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Sinani, B. (2022). The implementation of the ECHR and the need to extend the scope of constitutional complaint mechanism in North Macedonia. *Hungarian Journal of Legal Studies, 62*(2), 162–183. https://doi.org/10.1556/2052.2021.00331

BOOK REVIEW

Baccaro, L., Blyth, M. & Pontusson, J. (Eds.) (2022). Diminishing returns: The new politics of growth and stagnation. Oxford University Press

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The authoritative article of Baccaro and Pontusson (2016) gave impetus to a special field of comparative political economy, namely the growth model literature. The multi-author volume entitled *Diminishing returns: The new politics of growth and stagnation* can be considered a direct – though much more voluminous – continuation of the aforementioned article. It was published by Oxford University Press in 2022 under the editorship of Jonas Pontusson, Lucio Baccaro and Mark Blyth.

The book's introduction was written by the three editors. It has an important role in laying down the foundations that constitute real coherence between the following seventeen chapters written by twenty-eight authors. The editors acknowledge economic growth as the main source of legitimacy within democratic capitalism. This way, they explain why economic growth, the different models for delivering growth (*growth models*) and the possible lack of growth (*secular stagnation*) were chosen as central concepts throughout the book. They create a framework for the whole book by making some initial arguments about how the discipline of comparative political economy should be reconsidered. First, the exclusive focus on the supply side should be supplemented with an analysis of aggregate demand. Second, macroeconomics should be brought back into the game. Linked to the latter two points, the editors call for a post-Keynesian approach to macroeconomics. Third, it is argued that advanced capitalism is facing a tendency to stagnation. Fourth, the synergies between comparative (CPE) and international political economy (IPE) should be better exploited. Finally, it has to be considered that the sustainability of *growth models* is conditional on both electoral politics and the existence of a supporting *growth coalition*. These five arguments outline the foundations of the *post-Keynesian-based growth model approach,* which constitutes the primary subject of the book.

After introducing the concept of the wage-led regime and its supposed dominance amongst advanced economies, the editors outline the history-based narrative of the growth model literature: the oil crises of the 1970s brought about the end of the so-called Fordist model. This was based on institutionalized wage-bargaining, contributing to a relatively large wage share. The latter perfectly suited the wage-led regimes and resulted in a healthy rate of growth. However, the exhaustion of the Fordist model resulted in a turn in policy-

making, referred to as Thatcherism, Reaganomics, or neoliberalism. The important consequence is that the wage share started decreasing, which resulted in depressed aggregate demand that paralysed growth opportunities. In order to cope with the insufficient demand, countries had to look for additional drivers of demand. The different responses of countries to this challenge generated a variety of growth models. Throughout the book, four core models are differentiated: *export-led* and *debt-driven consumption-led models* are the basic ones, while some countries have adopted a mixture of them, resulting in *balanced growth models,* and some countries have failed to adopt a coherent model, leading to *failed models*.

The rest of the book is organized into four parts, first addressing theoretical issues and then larger regions through the lens of growth models. Third, comparative country case studies are delivered, and finally, the political aspects of growth models are presented.

To start with the theoretical elaboration, Engelbert Stockhammer and Özlem Onaran wrote the first chapter on the post-Keynesian foundations of growth models. In the second chapter, Herman Mark Schwartz highlights the special role of intellectual property. The link to the growth model literature is presented as follows: There has been a shift in the corporate organizational structure, giving an advantage to corporations with robust intellectual property rights (IPRs). Those corporations that can establish a certain amount of monopoly power through their protected intellectual property earn the most profit. However, these firms tend to have a relatively low marginal propensity to invest, coupled with limited number of employees. The fact that the highest profits are concentrated in IPR-intensive firms with moderate investment propensity is responsible for the insufficient aggregate demand.

The last chapter of the theoretical overview was written by Schwartz and Blyth. The chapter presents the international considerations and the IPE perspective of growth models. The central argument is formulated in contrast to the observed country-level bias of CPE, claiming that the features of different models are not confined to country-level aspects. More precisely, country-level factors are frequently activated and shaped by global, system-level processes. Throughout the chapter, different mechanisms are presented concerning how the global system and country-level growth models interact.

The high-level empirical part of the book starts with a presentation of the post-crisis growth model of the Eurozone by Alison Johnston and Matthias Matthijs. The authors are unambiguously critical of the post-crisis development of the Eurozone's macroeconomic policies. According to their argumentation, in the 2000s, the Eurozone sensibly accommodated diversity in growth models. However, the Great Financial Crisis (GFC) brought about a turning point: the export-led economies of the North better withstood the crisis compared to countries with debt-driven consumption-led models. This resulted in a shift in power relations that enabled the export-led economies to impose their policy preferences – especially fiscal austerity – on the whole monetary union, leading to sub-par growth performance.

Chapter 5 is written by Yeling Tan and James Conran on the growth models of China. Using the plural form 'models' is not accidental. The main argument is that the growth model based on manufacturing exports is just one of more simultaneously existing models. The export-driven sectors are concentrated on the coast, while the state-led investment-driven model is prevalent in the interior of the country. This way, China is presented as

a hybrid case – a *'system of systems'*. This heterogeneity is assumed to be rooted in the incremental and experimental nature of reforms applied in previous decades.

In the sixth chapter, Jazmin Sierra presents Latin American countries as typical examples of commodity-driven growth models based on the extraction and export of primary products. Such a one-sided model is viewed as detrimental. Therefore, several trials have been made historically to rebalance the model – without too much success. The general lesson is that once a growth model is established – even if it is detrimental – it is difficult to change. Such change is blocked most of all by the distributional interests of the previously privileged faction of society.

Chapter 7 is devoted to the FDI-led growth models on the European periphery: East-Central and South-Eastern Europe. Cornel Ban and Dragos Adascalitei present an export-driven model with a specific feature of extensive reliance on incoming foreign direct investment (FDI). As the model might entail the threat of the middle-income trap, the potential upgrading of the model is a crucial question. The main theoretical argument is that model changes are likely to occur when the model becomes strongly dependent on a specific growth driver, and this driver receives a shock. In the examined model, such a driver might be the positive gap between labour productivity and real wages. The main empirical conclusion is that, despite several challenges, the export/FDI-driven model of the region is still in place.

The third part of the book continues with country case studies. In Chapter 8, Alexander Reisenbichler and Andreas Wiedemann present the credit-driven consumption-led growth model of the United States and the United Kingdom. With this model, the insufficient demand caused by the declining wage share in the post-Fordist era is managed by domestic demand stimulus. The model is built on a permissive regulatory and fiscal environment, allowing households to counterbalance their stagnating real wages by resorting to loans.

In Chapter 9, Baccaro and Martin Höpner present an alternative solution to make up for insufficient demand: the export-led growth model of Germany. This model is built on raising export competitiveness through real undervaluation of the currency. Undervaluation is accomplished partly via a wage-bargaining regime centred on the idea of *employment for wage moderation*. Further elements for suppressing domestic demand are conservative fiscal and monetary policy coupled with strict credit regulation. The key challenges to the model are whether the world economy remains open to trade and whether it tolerates large imbalances in the current account. Furthermore, the potential erosion of the euro system also poses a potential threat to sustainability.

The German case hints that an export orientation necessarily comes at the expense of domestic drivers of growth. This is why the Swedish balanced model presented by Pontusson and Lennart Erixon is of great interest. To explain the alignability of different components of growth, the authors of the book refer to the price elasticity of exports. With a heavy reliance on its manufacturing sector, Germany is assessed to face high price elasticity, necessitating the extensive moderation of domestic demand. On the other hand, the Swedish economy has undergone a more pronounced shift towards an ICT-based knowledge economy, making the external demand for its exports less sensitive to prices. As a result, the opportunity has opened up to maintain export performance combined with an increase in the role of domestic drivers of growth.

In Chapter 11, Lucio Baccaro and Fabio Bulfone investigate the growth models of Italy and Spain over the past 30 years. Their main insight is that despite the alleged similarity, the two countries have followed strongly dissimilar growth paths: Italy's comparative surplus of about 30 per cent in GDP per capita in the early 1990s has nearly disappeared. The authors explain the better performance of Spain by the latter's coherent choice of one of the two models facilitated by EMU membership – namely, a credit-fueled domestic-demand-led strategy. On the other hand, Italy lacked coherence and wavered between a credit-fueled model and the German-style export-led growth strategy.

After publishing an article in *Politics & Society* (Bohle & Regan, 2021), Dorothee Bohle and Aidan Regan also published a chapter in *Diminishing returns*. Now the case of Ireland is paired with that of Latvia. The grouping criterion is how small countries find niches that service the interests of global capital. The central concept of the chapter is the global wealth chain (GWC). GWCs incorporate capital movements with the pure intention of optimizing the regulatory environment. The Irish model is praised by the authors for being able to reap the benefits of GWCs in a pro-developmental way. The Latvian model of exploiting global capital movements lacks the pro-developmental feature: it is built on the banking sector attracting illicit wealth from abroad.

The fourth and last part of the book focuses on policies and politics related to growth models. Chapter 13 is written by Cornel Ban and Oddný Helgadóttir to address a gap identified in the VoC literature: the role of financialization. After reading the previous twelve chapters, it is not a surprise that financialization is presented as having an important role in debt-driven consumption-based models, just as the underdeveloped nature of financialization is in export-driven models.

In Chapter 14, Jonathan Hopkins and Dustin Voss intend to fill the gap in the growth model literature that neglects party politics. The authors present a historical evolution of party politics, highlighting that the end of the Cold War left voters with a choice between barely distinguishable mainstream parties. These parties are called *cartel parties,* which fit with the prevalent economic model in that they agree on the key neoliberal policies and close out alternative approaches – such as more interventionist ones. The authors argue that the Great Financial Crisis had the potential to activate previously dissatisfied but acquiescent voters, resulting in an *electoral turn*.

The book dedicates a separate chapter to fiscal policy – more precisely, austerity. The main argument of Evelyne Hübscher and Thomas Sattler in Chapter 15 is that the potential resort to fiscal austerity depends first on the underlying growth model. Their theory opposes the voter-driven bottom-up perspective, which highlights electoral responsiveness.

In Chapter 16, Julia Lynch and Sara Watson investigate how the welfare state shapes the growth model. After presenting various welfare reforms associated with key cases in the growth model literature, the authors do not find strong evidence that welfare states are consciously constructed to promote the economic functioning of the growth models. Instead, based on their assessment, the relation is rather indirect: the welfare state policy has a substantial role in building political legitimation and growth coalition behind the economic models.

In the final chapter, Jonas Nahm investigates green policies through the lens of the growth model perspective. He poses the question of why certain economies are ahead of others in the green transformation. He interprets green growth as a popular strategy for

combining climate issues with economic gains – therefore, a strategy for making green policies attractive to certain factions of society from which a supporting coalition may be formed.

To summarise, I recommend the book to anyone who would like to get acquainted with either the growth model literature or its post-Keynesian foundations. After reading the seminal article of Baccaro and Pontusson (2016), *Diminishing returns* will not deliver any surprises. In contrast to the article, however, the book offers much more space to investigate how growth models interact with a wide range of theoretical phenomena. Second, the book as a genre facilitates the authors' going beyond a presentation of the most typical empirical examples of growth models – Germany being export-led, the USA being debt-driven consumption-led, and Sweden having a balanced growth model.

One shortcoming I need to highlight concerns secular stagnation. The narrative of the growth model literature is based on the sub-par growth performance of the post-Fordist era. The book does not provide convincing empirical evidence that secular stagnation is a present challenge. A key value of the publication – for which credit goes to the editors – is that despite the twenty-eight authors, the book has strong internal coherence. The volume is well-edited, and the chapters are organised logically, constructing an easy-to-follow arc of thought.

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BOOK REVIEW

Simon, Z. & Ziegler, T. D. (Eds.) (2022). European Politics: Crises, Fears, and Debates. L'Harmattan

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While crisis management is not new to Europe, nowadays, many of us have the impression that the continent is undergoing several unexpected crises, which can even be interpreted as existential threats. Recent European challenges include disintegration in the European Union, migration, rising populism, climate change, the global pandemic-related crisis, and war in the neighbourhood. As a consequence, in recent years, scholars have increasingly sought to understand the nature of the challenges and their political, social and economic impacts on Europe. For instance, Paul Kubicek in *European Politics* tackles the major policy questions in Europe while surveying their historical and institutional backgrounds. Furthermore, several authors (Berend, 2010; Webber, 2017; Youngs, 2018; Zielonka, 2018; Haass, 2020) have raised the question of how the EU can survive its struggles with a multilevel poly-crisis. The book *European politics: Crises, Fears, and Debates,* edited by Zoltán Simon and Tamás Dezső Ziegler, contributes to these scholarly discussions and aims to provide a brief but very well-structured overview of recent crises.

The main argument of the book is that Europe is in crisis – most importantly, a legitimacy crisis. The editors invite the reader to understand several factors (increasing political mistrust, fears of disintegration at the European level, fears of disorder at the national level, and fears of the future) that should not be ignored because they can generate a new political era of anxiety on the continent.

The book first reveals that little attention has been paid to the theory and practice of potential disintegration so far (p. 15). Zoltán Simon explains the legitimacy crisis through the politicisation dilemma, the changes in politics at the national level, and in a global context, injecting fresh air into recent scholarly discussions.

The book is divided into nine chapters (plus an introductory chapter) and is selective in its choice of topics, which might be a limitation. The authors ask questions – related to integration, social issues (demography, inequalities), migration, sustainable development, democracy, political communication, securitisation, and Global Europe – without always giving answers. Therefore, the book may not only be used by university students and professors but can encourage broader public engagement with recent European events. 'It is about politics, but without the intention of making politics' (p. 28).

The first chapter provides an overview of integration and disintegration in the European Union, written by Tamás Dezső Ziegler. The author points out that the understanding of integration needs further clarification. The chapter offers a complex interpretation of European integration and disintegration by explaining different forms of integration(s), the theoretical background, and lessons learnt from different theories. Several questions emerge in the introduction to the chapter: Integrating what, how, and what for? (pp. 33–38). Chapter 1 will be especially useful for students or those who are not familiar with basic notions of European studies because it lists not merely the stages of integration but also introduces a new vocabulary. The author defines linguistic integration, unification, convergence, divergence, and differentiated integration before dealing with the scholarship of integration. Ziegler critically looks at how different theories of European integration – namely neofunctionalism, intergovernmentalism, institutionalism, constructivism, and realism – have been used to try to model the integration and disintegration of European countries (pp. 39–43). Recent challenges, including Brexit, the refugee crisis of 2015 and authoritarian tendencies, raise the legitimate fear of (major) disintegration. Instead of providing an answer to this question, the author highlights a new model of integration and disintegration: dynamic equilibrium, which happens when 'integration and disintegration are happening at the same time, within the same system, in different fields, continuously' (p. 43).

Chapter 2, 'Inequalities and Social Europe,' written by Zsófia Katalin Kollányi, contributes to presenting the social tensions that have led to growing inequalities between the EU Member States. The case of Brexit is used by the author to illustrate a wide range of problems and fears related to the future of the European community. Several socioeconomic fears have arisen; for instance, the fears that immigrants might take jobs away from locals and that the United Kingdom will lose its national sovereignty (p. 50). The author provides several diagrams to demonstrate the rising inequalities in Europe with regard to socioeconomic issues, structural differences between Member States, and the diverse impact of the financial crisis among countries (pp. 51–61). The last part of the chapter seeks to offer a coherent understanding of the debate about the causes of inequalities and recommended solutions, such as the concept and evolution of Social Europe (pp. 63–66).

In Chapter 3, we learn more about the link between demography and migration in Europe. Zoltán Simon and Tamás Dezső Ziegler define basic demographic trends based on Massimo Livi-Bacci's diagnosis of contemporary European societies and their impacts on European politics. A demographic transition may be observed in Europe because of numerous issues, like declining mortality and fertility rates, increasing life expectancy, an ageing society, and the end of mass emigration from and the beginning of immigration into Europe. Iván T. Berend identifies these tendencies as 'dramatic demographic changes' in European societies (p. 74). Additionally, the policy, political, and external dimensions of the demographic change have far-reaching political implications (pp. 76–79). The authors raise awareness that these social norms and trends should not be ignored because they have the potential to deepen the cleavages between Western and Eastern societies (p. 78). The end of the chapter mentions the global implications of European demographic phenomena, mainly the case of migration.

In Chapter 4, Tamás Dezső Ziegler connects misleading political discourses between migration and politics. First, the author focuses on the technocratic perspective, the main

argument of which is that Europe needs migration in order to cope with its declining workforce (p. 80). Despite the fact that EU leaders express openness to migration, this friendly rhetoric might mask an inhospitable Europe. A major strength of this chapter is that it reveals the dark side of European migration policy by covering the EU–Turkey deal to send asylum-seekers back to Turkey, the collapse of the quota system, hindering the work of rescue ships in the Mediterranean Sea, and refugees being sent back to non-safe third countries. These phenomena are morally questionable. The findings presented in this chapter confirm that migration is definitely politicised and could become a source of disintegration if there is no balance between economic interests and proper social integration (p. 85).

The book continues with the topic of ecological debt and sustainable development. Chapter 5 provides an overview of the EU's approach to sustainable development since the 1990s. Gábor Szabó and Szabolcs Diósi highlight that the EU's path towards sustainable development 'brings various forms of economic, social and environmental policies under one collective objective' (p. 93). Since the adoption of the 1997 Amsterdam Treaty, the EU has constantly striven to deal with sustainable development issues; however, not only has the Lisbon Strategy failed to deliver on its central promise of making Europe the most competitive economy in the world but meeting all the Sustainable Development Goals represents a great challenge for Europe. The authors reveal that there are significant domestic performance gaps within EU Member States, not just among the global community (p. 97). This chapter also details further EU strategies that are significant responses to climate-related issues – for instance, the European Green Deal, the Circular Economy Action Plan, and a new European industrial and innovation strategy (pp. 97–99). Nevertheless, more impactful activities, more comprehensive approaches, and integrated cooperation are needed between the EU and its international partners.

Chapter 6 focuses on democracy and mistrust while introducing the main drivers of recent political tendencies in Europe. Anna Unger argues that the recent period can be called a 'decade of distrust' because of growing dissatisfaction with democracy, rising populism, the weakening of liberal democracy, and increasing illiberalism (p. 103). All of these tendencies confirm that the classical cleavages have been transformed, and more ideological ones are returning. The author raises the question and makes the reader critically wonder – how can we describe the state of democracy? She gives a detailed explanation: dissatisfaction with democracy, the rise of populism and the polarisation of politics contribute to the erosion of democratic values and represent serious challenges to liberal democracy (pp. 105–111). One of the most significant components of this chapter is where Anna Unger highlights that distrust and disillusionment are the result of the problem, not the cause. She gives several examples of such forms of distrust based on an investigation by Rosanvallon: for example, the liberal distrust of power, democratic distrust, and distrust of society itself (p. 112). Another relevant issue that is addressed in this chapter is whether populism or illiberalism is inevitable. The author responds in the negative: first, because there are ups and downs in liberal democracies, and second, because of the weakening of social inclusion and the extreme growth in economic equality lead to questioning institutions of both constitutional liberalism and democracy. The chapter ends with the idea of pluralist democracy – according to which no actor, ideology, politician, or social group can be in a hegemonic position – as a replacement for liberal democracy (p. 118).

In Chapter 7 ('Fear and Securitisation'), Beáta Kovács interprets the potential connection between (political) identity and fear through the securitisation process. The author points out how the emotional dimension plays an important role in politics. The dual nature of fear in relation to politics means that it can be shaped, intensified, and created (p. 123). Fear can be examined as a social phenomenon: we live in an age of uncertainty; thus, the politics of fear has become real, and the difference between the left and right has faded (p. 125). Further on in this chapter, the discourse of fear is presented. Beáta Kovács mentions two significant arguments: the connection between populism and fear and the concept of securitisation, which broadens the concept of security (p. 128). On this basis, securitisation refers to a communication process, which topic is widely discussed in relation to fears about migration.

Chapter 8 on 'Political Communication and Populism' first offers a summary of different periods in the evolution of political communication in Europe. Norbert Merkovity and Büşra Özyüksel highlight tendencies through which political actors' communication may be understood. A great advantage of this chapter is that the authors provide a clear explanation of how politicians use social media in Europe while introducing the media and network logic associated with a new political culture that includes celebrity or influencer politicians (pp. 140–143). After presenting mediatisation and its logic, the authors deal with the rise of social media and its impact on populist political communication in Europe (pp. 145–148). This trend puts pressure on citizens' political attitudes, emotions, and behaviour. At the end of the chapter, the reader is faced with a thought-provoking prognosis: 'populist communication may dominate European political discourse in the future,' which may lead to further challenges (p. 148).

Chapter 9 ('Global Europe and Strategic Sovereignty') is structured into four parts. The first part is written by Zoltán Simon and points out – in line with the framework of strategic autonomy and strategic sovereignty – that 'new dynamics in the EU's external and internal environment seem to [be accelerating] the emergence of a new policy attitude' (p. 153). The author mentions several factors (the identity crisis of the EU, fear, and other vague concepts) to reveal some problems with European strategic autonomy. The second part of the chapter is about strategic autonomy and security defence, where Zsolt Nagy argues that the increasing complexity of Europe's security environment is leading to major geopolitical shifts. One of the main challenges arises from the diverging Member States' approaches to strategic autonomy in security and defence. In the third part, Tamás Dezső Ziegler introduces the free trade debate within the EU through the case of the TTIP (Transatlantic Trade and Investment Partnership) and CETA (Comprehensive Economic and Trade Agreement) initiatives. Here, the author argues that the EU needs to invest in a genuine rethinking of its trade system while also listening to the voices of its citizens. Last but not least, Viktor Szép presents the most important information about international sanctions and the European Union as a major sanctions actor (key policy documents, the average time of sanctions, reasons why the EU imposes sanctions, inconsistencies with regard to their practice). The subchapter concludes that in order to avoid counterproductive actions when imposing sanctions, there is a need for cooperation between EU Member States.

The major advantage of this book is its logical structure and interlinked chapters (which can also be read independently), which provide a clear overview of the most sig-

nificant European challenges and their impacts through well-known examples such as Brexit. Furthermore, key concepts and definitions at the end of the chapters make this book student-friendly. This book does not just introduce European debates, but its critical approach makes the reader think, and most importantly, it raises awareness of how current European debates could influence our everyday lives.

European Politics: Crises, Fears, and Debates is a book which perfectly manages to capture the main challenges and debates in contemporary European politics. Accordingly, not only students but anyone who is interested in recent multidisciplinary disputes could benefit from reading it. The greatest strength of this edition is that it includes valuable information, straightforward summaries, and, most importantly, explains social, political, and economic trends from an up-to-date perspective.

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