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### ESSAYS



### BOOK REVIEW

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### ESSAYS



### BOOK REVIEW

# ESSAYS

# Old Empires, Modern State: Legacies of Partitions on Voting Behaviour in the 2023 Polish Parliamentary Elections

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**Abstract:** *The legacies of former partitions are still visible in today's Poland in the economy, society and politics. Our article integrates the historical and geographical perspective into the study of electoral behaviour in Poland. We conduct a geographical description of electoral results in the 2023 parliamentary elections and determine how economic and cultural attributes related to different paths of development associated with the former partitions are reflected in the apparent spatial differences. We distinguish between direct and indirect influence. It is indirect when differences in economic development (e.g. changes in agrarian structures) or cultural transformations (e.g. secularisation) resulting from former policies are reflected in different electoral choices. The influence is direct if belonging to a former empire determines electoral behaviour regardless of the economic and cultural determinants of the vote. We found that the influence concerns primarily the former Russian and Austrian regions. The analysis is conducted at the county (powiat) level.*

**Keywords**: ***2023 elections in Poland, Central Europe, historical legacies, party politics, spatial analysis***

## Introduction

The legacies of former partitions are still visible in today's Poland in the economy (Bukowski et al. 2017), society (Barkowski 2004) and politics (Krzemiński 2009). Detecting the shape of former empires in the contemporary spatial

patterns of development is also a common interpretative trope for experts, journalists and the general public. The geographical distribution of votes does indeed resemble the borders of the Russian, Prussian and Austrian empires before World War I. Our article is an attempt to integrate the historical and geographical perspective into the study of electoral behaviour in Poland. We want to start with the geographical description of electoral results in 2023 parliamentary elections and determine how economic and cultural attributes related to different paths of development are reflected in the apparent spatial differences.

The influence of the former partitions may be direct or indirect. It is indirect when differences in economic development (e.g. changes in agrarian structures) or cultural transformations (e.g. secularisation) resulting from former policies are reflected in different electoral choices. The influence is direct if belonging to a former empire determines electoral behaviour regardless of the economic and cultural determinants of the vote.

The paper starts with the overview of relevant studies of the legacies of partitions and electoral behaviour. Second, our methodology and the approach to the data analysis are presented. Third, we present the results. We map the vote in the 2023 elections from the geographical perspective; we determine whether the region (i.e. belonging to the former partition) is a factor in the election result; and lastly, we perform multivariate analysis to determine the importance of economic factors (earnings, unemployment) and cultural ones (religious practice) on election results. We treat cities (towns with county status) as separate entities. In our model, the city is both a cultural and economic category, as city dwellers are different in economic terms, but also because urban areas produce a distinct cultural milieu (Castells 1983; Florida 2005). We control for this factor. The analysis is conducted on the level of the county (powiat).

## Historical legacies and voting behaviour

Historical heritage and its impact on the spatial diversity of voting behaviour is a research field that attracts the attention of scientists around the world (Sunilraj & Heath 2017, Berman & Nugent. 2019, Katchanowsky 2006). However, the influence of historical legacies turns out to be the strongest and most lasting (or the most studied) in Europe. There is significant research on the influence of historical regions on political preferences in Poland, Romania, Spain, Great Britain and Ukraine (Haydukiewicz 2011). Findings have shown a lasting durability of the influence of the historical past on the spatial differentiation of election results in Spain, Romania, Ukraine and Poland (Haydukiewicz 2011). The communist past is also important (Pop-Eleches 2007; Roper & Fesnic 2003). In this context, Poland, a country with a complicated history and dynamic political changes, offers a unique case for analysing this phenomenon.

In Poland, there have been many attempts to describe and study the influence of historical factors on the spatial diversity of electoral behaviour (Georgica 1995, Zarycki 1996, 1997, 2000, 2002, 2003, 2007, Raciborski 1997, Kowalski 2000, 2003, 2004, Kowalski & Śleszyński 2000, Bartkowski 2003, Skwierzyński 2008). These works can be classified by two approaches to the spatial differentiation of voting behaviour: historical-cultural and socio-economic (Zarycki 1997). According to the first approach, the differentiation of political preferences is caused by the partition of Poland, or the division into four civilisation zones, also separating the lands incorporated to Poland after World War II, while the second approach refers to the current socio-economic differentiation of these territorial units (Zarycki 1997).

According to the first approach, the key element shaping voting behaviour is awareness and identification with a specific socio-civilisational pattern characteristic of a given region. Factors such as financial situation, social position, age, level of education or place of residence also play a role, but are less important (Turek 2012: 453). Most researchers in this group believe that the partitions had the greatest importance for shaping regional political structures, production methods and dominant cultural patterns (Kowalski 2000, Kavetskyy 2010, Zarycki 2015,). In their opinion, the adaptation of the population to the patterns and legislation applicable in individual partitions (which occurred throughout the XIX and early XX century, i.e. the period of the industrial and national revolution and the development of capitalism) influenced the differentiation of social capital and civic activity in the regions (Hryniewicz & Jałowiecki, 1997). According to Jacek Raciborski (1997: 158), 'in each partition, different patterns of political culture and different dominant ideological and political orientations were formed, and this process was conditioned by the policy of the empires towards the Polish population in the annexed areas, as well as the nature and method of organizing the state, as well as the level of its economic and cultural development.'

However, some scholars believe that the changes that took place in Poland in 1940–1947 are crucial for today's voting behaviour (Turek 2012). This was the period of the mass migration, which led to lasting changes in the areas subject to resettlement (Greater Poland, the northern and western territories, parts of Pomerania). The resettlement is closely related to weak social bonds and the lack of roots and, consequently, the development of an individualistic society, as opposed to a communitarian society in lands not subject to migration. During this period, economic and political changes overlapped with demographic changes. Another important factor in these regions was the existence of the state agricultural sector, where employees had access to education, mass media and political information channels that influenced their political views. At the same time, people working on their own farms maintained greater independence and stability of views.

Analyses regarding the influence of the partition division or the division into four civilisation zones to explain voting behaviour in Poland have a long tradition. The analysis of the 1989 elections revealed regional differences and their presence was confirmed in later years (for review see: Kowalski & Śleszyński 2018). Analyses from 1989 to 2002 (Turek 2012) indicate the existence of a bipolar political division, referring to the 'axis of values' (Żukowski 1998), i.e. the division into post-communist and post-Solidarity values, reflected by left-wing and right-wing identification, related to the different historical fate of Polish lands during the partitions and after the war. This is coupled with the level of religiosity among the inhabitants of particular areas and the influence of the Church (Kowalski 2000). As a result, regions such as the new territories, Greater Poland, Warmia, Masuria, the industrialised parts of the former Russian partition, as well as areas inhabited by national and religious minorities, were left-wing oriented, while Galicia (former Austrian partition), and most of the Russian partition supported right-wing parties (Kowalski 2003, Dzieliński 2009, Turek 2012, Kowalski & Śleszyński 2018).

The elections in 2005 and subsequent votes continued these patterns only to some extent. The strength of influence and the axes of division changed. Until that date, the competition was between right-wing and left-wing groups representing the value axis. Since 2005, interests have become relevant: economic issues have become an important determinant of voting (Krzemiński 2009). In 2007, a transformation of the political scene took place, consisting of the marginalisation of left-wing groups and the strengthening of the liberal parties (Dzieliński 2009). Law and Justice (PiS) strengthened among the rural electorate, while the Civic Platform (PO) gained some of the votes of liberal and leftist parties. The Polish People's Party (PSL) kept the support of farmers from the Russian partition, but it also gained voters in cities (Dzieliński 2009, Kowalski & Śleszyński 2018). At the same time, the value axis changes: the post-communist and post-Solidarity camps were replaced by the liberal and conservative-national camps, respectively (Kaczorowska 2006).

The maps of support for the two largest parties still reflected the civilisation zones (except for 2015, when the overall high support for PiS blurred the boundaries of the partitions). However, the voting pattern of large cities, which had previously supported right-wing parties, changed. After 2005, liberal and left-wing groups began to win in cities, promising modernisation (Dzieliński 2009). As Turek (2012: 456) wrote, 'as long as the left was synonymous with stagnation and defence of the status quo, the metropolitan electorate was in the same camp with the right-wing and provincial countryside, which cherished the memory of the "good old days", i.e. an independent state and connection with Western (Latin) civilization, which emphasized its attachment to the Catholic Church. The paradigm of the "Solidarity" movement emphasized the importance of unity, the alliance of the peasant with the worker and the intelligentsia, in the

name of national goals.' The end of the post-communist cleavage (Grabowska 2004) contributed to the breakdown of the city-village alliance.

The dominance of the axis of economic interests results in the explanation of voting behaviour by the personal social and economic situation, which affects cultural differences (Grabowski 2018, Bartkowski 2003, Zarycki 1997, Bartkowski 2003, Jasiewicz 2009). Empirical analyses of the impact of economic factors on the spatial distribution of party support are relatively rare. This type of study is most often conducted at the individual level (for Poland see: Grzelak 2002, Markowski et al. 2015, Sroka 2015, Jasiewicz 2022). The few works devoted to elections concern the impact of unemployment (e.g. Hajder 2012, Grabowski 2018) or the income in the territorial unit (e.g. Pierzgalski 2012, 2015). They confirm the influence of economic factors at the level of territorial units on electoral preferences. Most empirical analyses are attempts to reconcile (or disentangle) these two approaches. In most cases, they show that voting behaviour can be explained by reference to a historical factor, but they also reflect the current socio-economic situation (Kabath 2002, Kowalski 2000, 2003, 2004, Krzemiński 2009, Grabowski 2018).

Our article on the 2023 parliamentary elections is a part of the literature aimed at determining which of the factors described above – history or contemporary economic and cultural conditions – is key to explaining support for the party at the county level. We want to establish the durability of the historical legacies.

## Methodology

Our research model assumes that long-term legacies in historical development result in differences in attitudes and worldviews and, consequently, in voting patterns in regions of Poland defined by different paths of development. The partitions of Poland occurred at the turn of the XIX century and policies of the three empires had a lasting effect on social consciousness. This concerns economic development (industrial revolution, urbanisation), cultural change (e.g. the pace of literacy, the scope of education), and political development (type of regime, political culture).

The influence of partitions may be either direct or indirect. The indirect influence is exerted via differences in economic development between different regions (urbanisation, earnings) or by cultural change (e.g. secularisation). We assume that there is also a direct influence: there exists a continuity of social consciousness in different regions, which results in differences between regions regardless of economic or cultural factors; that even when economic and cultural factors are controlled for, the voting patterns are different. We test these propositions in the article.

Social consciousness develops in a 'process involving increasing awareness of social historical context, the ability to think abstractly about time and place,

and beyond the immediate everyday conditions to understand individual experience as embedded in a broader system of social relations' (Ammentorp 2007: 39). As an effect, it affects – consciously or not – every aspect of one's being. Marilyn Mandala Schilitz and co-authors present the typology of five levels of social consciousness: embedded, self-reflexive, engaged, collaborative and resonant, which differ as far as the degree of awareness and involvement of the individual are concerned (Schlitz et al. 2010: 22–23). We assume that the effect of partitions belongs to the embedded level, 'where consciousness is shaped without conscious awareness by social, cultural, and biological factors and which is a kind of presocial consciousness' (Schlitz et al. 2010: 22).

Our approach is sociological. It assumes that institutional continuity (cultural and economic) is important for the development of society and is expressed in political behaviour. Therefore, historically shaped social norms, values, attitudes and political attitudes related to the partitions are significant to this day, as they largely structure the diversification of social capital and thus civic activity (Jałowiecki & Hryniewicz 1997). To test our assumption, we need to determine where this continuity takes place. There were two cut-off points in continuity throughout recent history. First, during the partition period, the Poland-Lithuanian state was divided between three empires (Prussia, Russia and Austria) and since then, the population in these three parts has developed in different political, economic and cultural systems. The period defining the first discontinuity lasted from 1772 (first partition) to 1815, i.e. until the Congress of Vienna. The borders established in 1815 lasted until World War I. The borders of the second Polish state between 1918 and 1939 in the areas covering present-day Poland (i.e. excluding the areas now in Belarus, Ukraine and Lithuania) largely reflected the borders from before the first partition, and this is where we test the 'theory of partitions'. It has to be borne in mind that continuity in social development was limited by several important factors: the Holocaust (Jews constituted a significant proportion of the population, especially in urban areas of the Russian partition), post-war migration within Poland and resettlement or expulsion of German and Ukrainian minorities. The second point of discontinuity was after World War II. In 1945, German areas were incorporated into Poland, the local population was expelled, and the areas were populated by settlers. These areas are separate in our analysis, as continuity did not exist.[1]

For the purpose of the analysis, we divided Poland into four separate areas: 1. the former Prussian partition, in Poland after WWI; 2. the former Russian partition, in Poland after WWI; 3. the former Austrian partition, in Poland after WWI; 4. The new territories, i.e. the areas incorporated into Poland in 1945. The boundaries between partition areas are those determined at the Congress of

1 Maps are based on: Tazbir 2004; Pyzik & Szulc 2003.

Vienna in 1815. There are several cases when the pre-partition boundaries and pre-WWII northern and western borders of Poland do not match. Their classification must be resolved based on substantive considerations. We consider the continuity of social development (stability in population) to be the salient factor, so we classified these areas based on their pre-WWII status. The most important cases are: 1. Warmia (Ermland), which was incorporated into Prussia in 1772 but was not a part of pre-war Poland, thus we classified it as incorporated after 1945; 2. Parts of Upper Silesia were a part of Prussia with a distinct population and formed an autonomous region in Poland in the interwar period. We classified it as a part of the Prussian partition based on the 19th century Prussian institutional legacy and pre-war Polish statehood.

Our analysis is conducted at the level of powiat (county), a self-government level. All data is aggregated on the level of the county. Their borders do not always coincide with the historical borders, but they constitute an approximation in some cases. Border counties were assigned to the areas where most of their territories were located. The detailed procedures of data gathering are described in the appendix.

The aggregate level of data carries the risk of making an ecological error that may occur when conclusions about individuals are formulated on the basis of aggregated data. When analysing the impact of partition on voting patterns and public awareness, it is important to remember that conclusions drawn from county-level data may not accurately reflect individual behaviour or attitudes.

The analysis is three-stage. First, we present the geographical distribution of party results in 2023 parliamentary (Sejm) elections. Second, we verify whether the votes for the five electoral committees which are represented in the new Sejm differ by region. Third, we test our hypotheses about direct and indirect influence of partitions. The dependent variables are votes for parties. The independent variables are measures of economic development (earnings and unemployment), urbanisation (whether the county is a city, *miasto na prawach powiatu*) and religious practice, which is indicated by research as the key cultural factor determining voting behaviour. Following existing literature and recent research (Sześciło et al. 2021; Flis & Swianiewicz 2021; Swianiewicz & Flis 2022), we take into account clientelist relations between the Law and Justice government and selected regions. Government funds are directed towards regions with high support for the governing party, which presumably has an impact on election results. The measures used are financial aid provided by the state for important social reasons and revenue of the local government.

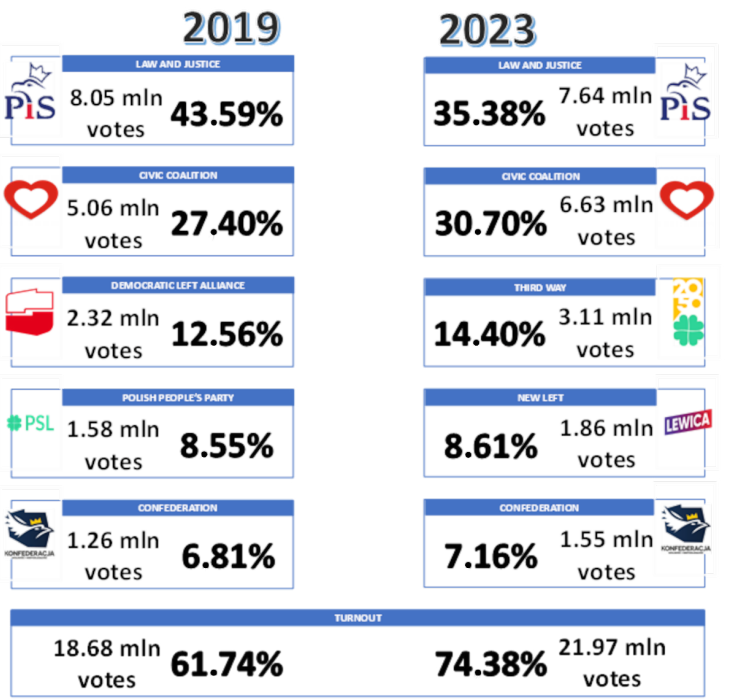
The 'partition theory' is tested by introducing the dummy variables indicting one of the four groups based on history and by interacting the partition variables with other variables of interest to disentangle their effects. In the article, we propose two competing hypotheses about the influence of economic and cultural factors and historical legacy on political preferences.

## Results

### *Overview: The results of 2023 parliamentary elections*

As a result of the 2023 parliamentary elections, five electoral committees entered Parliament. They are, in order of the electoral result: 1. Law and Justice (PiS), which is a right-wing group in government since 2015; 2. Civic Coalition (KO), a centrist and liberal coalition of four parties – Civic Platform (PO, in government between 2007 and 2015), Modern Party (Nowoczesna), Initiative for Poland (IdP) and the Green Party; 3. The Third Way, a coalition of the Polish People's Party (also known as the Polish Peasant Party, a junior partner in the 2007 to 2015 governments) and Szymon Hołownia's Poland 2050; 4. The New Left, formed after the dissolution of the Alliance of the Democratic Left; and 5. Confederation, a far-right party.[2] All these electoral committees included representatives of other small groups on their lists.

**Figure 1: Results of elections to Sejm in 2019 and 2023**



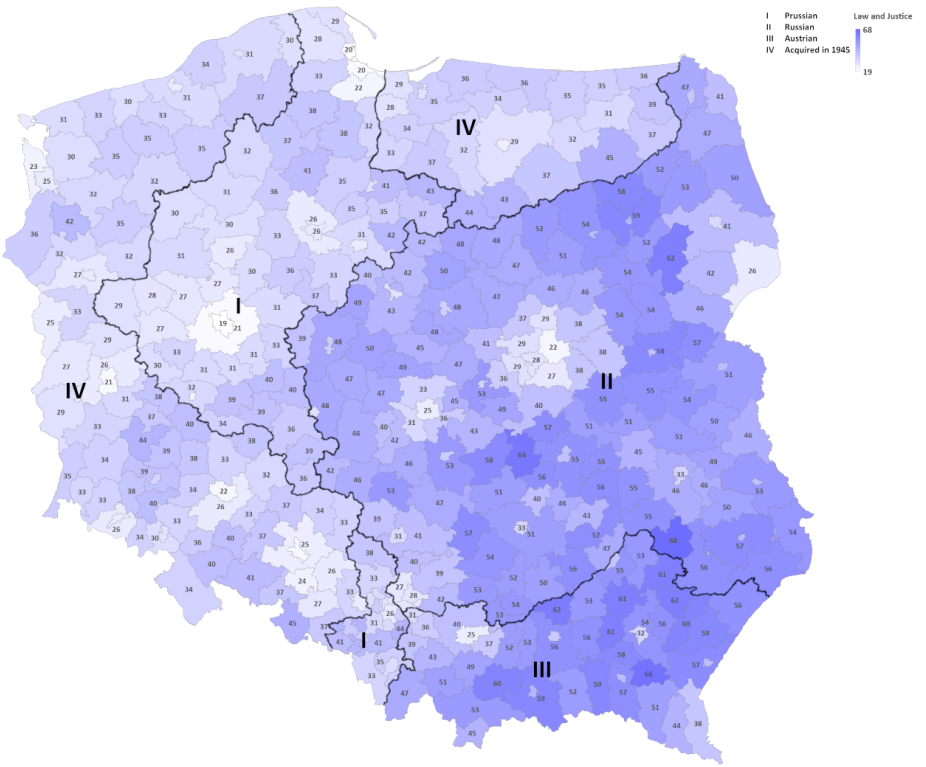

Source: Authors (based on the data from National Electoral Commission)

2 Party positions on a variety of issues are explored by the V-Dem (Varieties of Democracy) project <access online https://v-dem.net/vparty_dash >. Positions of party electorates on salient socio-economic issues are analysed by CBOS (Roguska 2021).

### *Regional differences in election results*

Civic Coalition (KO) gained significantly more support in the areas of the former Prussian partition and in the lands that were not within the borders of Poland before 1939 (formerly a part of the Kingdom of Prussia/the German Empire). Support of KO is clearly greater in the most urbanised and industrialised centres. This tendency is visible in all the areas we have identified. The differences between urban areas and land counties are relatively smaller in the former Prussian partition and in the lands incorporated after 1945. This is in contrast to the clearly marked difference in the areas of the former Russian and Austrian partitions between the visible strong support for KO in urban centres and the relatively weak support in rural areas.

**Figure 2: Vote for Law and Justice (PiS) in 2023 on the county level**

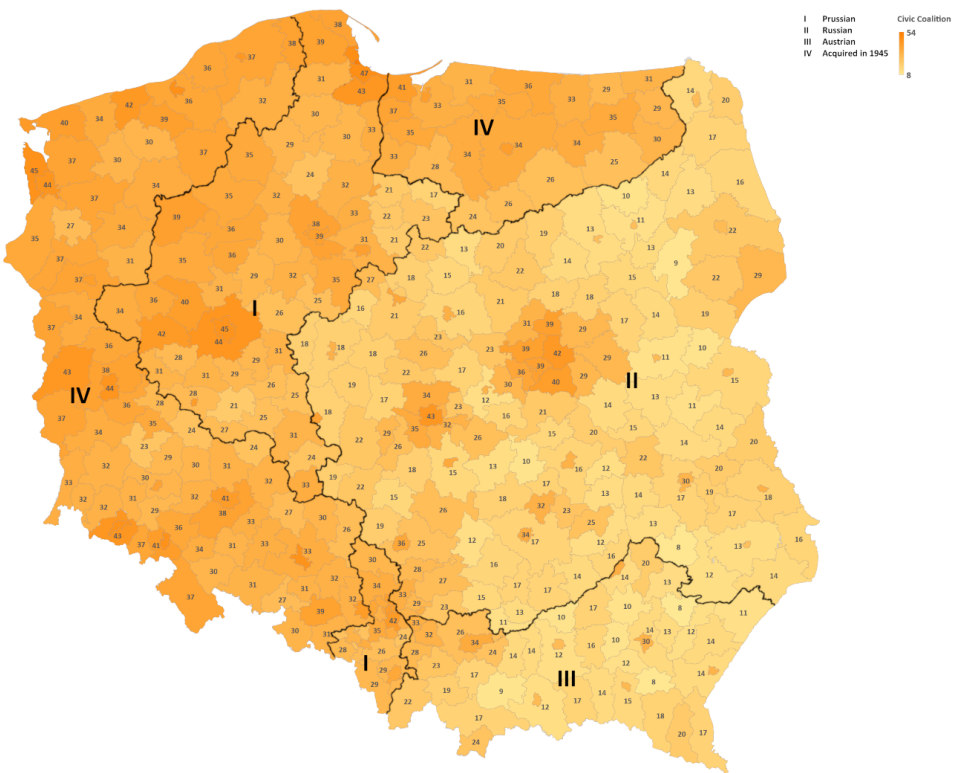



Source: Authors (based on the data from National Electoral Commission)

The geographical distribution of support for PiS is a mirror image of the vote for KO. Voters expressed the strongest support for PiS in rural areas in the former Russian and Austrian partitions. However, regardless of region, PiS has the least support for PiS in urban centres.

The map of support for the New Left shows a relatively weak correlation with the borders of the areas we designated. The trend seems to be meridional: the further west, the greater the support for NL – subject to small relative differences. The results closer to the eastern border fluctuate around 4% support, and closer to the western border around 6%. Against this background, the NL support in Zagłębie Dąbrowskie (former Russian partition, a coal and steel centre) stands out. NL obtained the highest result there, clearly different from the rest of the country.

**Figure 3: Vote for Civic Coalition (KO) in 2023 on the county level**

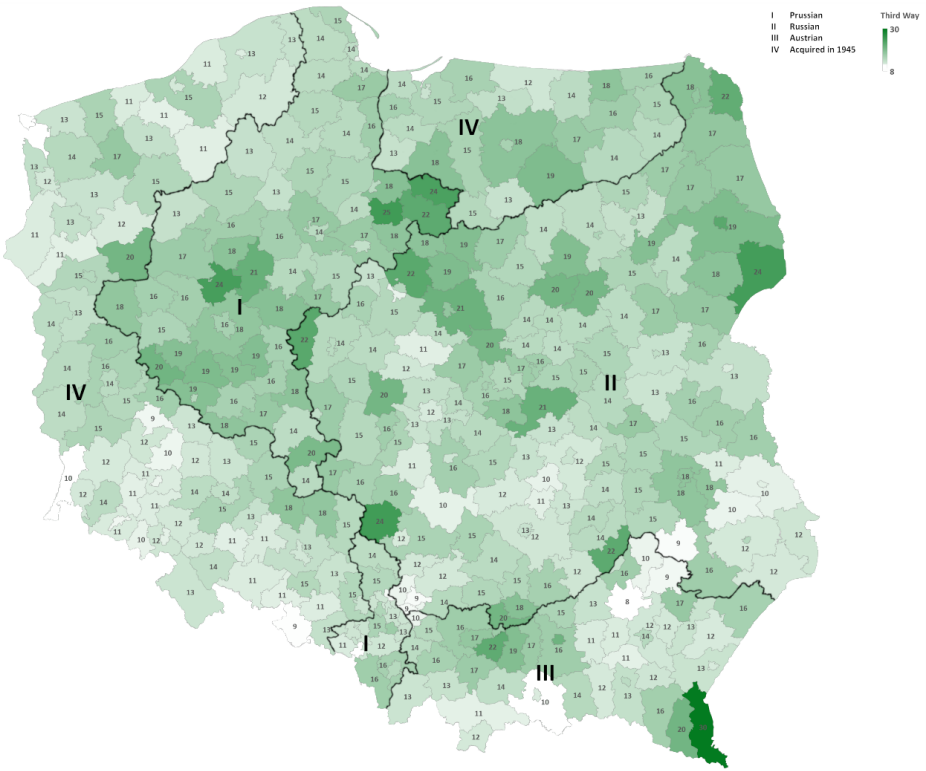



Source: Authors (based on the data from National Electoral Commission)

The electoral results of the Third Way do not show regionalisation consistent with our assumptions. Also, the traditionally accepted division into geographical regions or the administrative division of the country, or the rural-urban axis, do not provide clear grounds for trying to explain such a distribution of votes for the Third Way.

Support for the Confederation shows strong regionalisation. The Confederation achieved its best results in the north-east and south-east Poland, i.e. close to the border with Ukraine and Belarus. Such results may be related to the geopolitical situation and the proximity of the war in Ukraine.

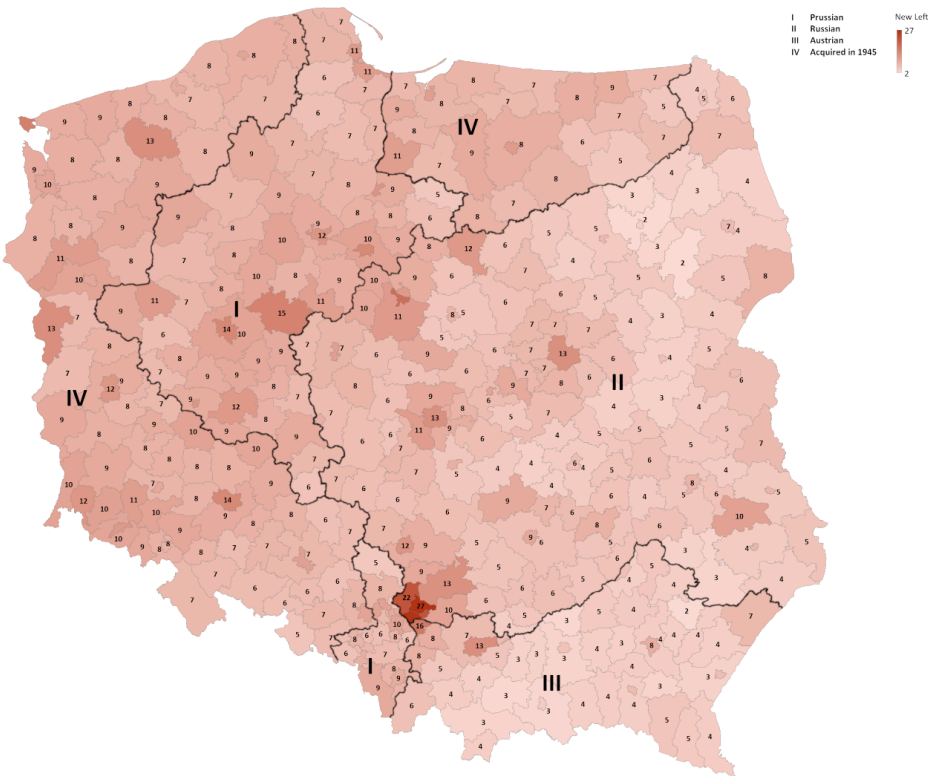
**Figure 4: Vote for the Third Way in 2023 on the county level**




Source: Authors (based on the data from National Electoral Commission)

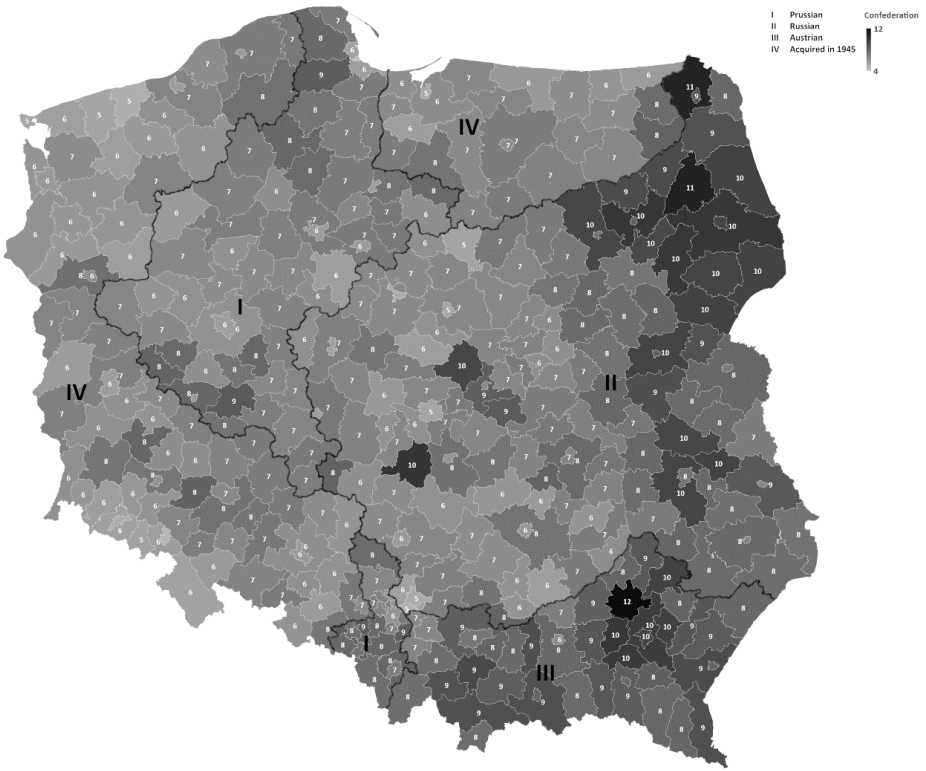
Comparison of means of the results obtained by individual electoral committees confirms the significance of regional differentiation for party support. The strongholds of PiS and Confederation are in the former Russian and Austrian partitions, and PiS has relatively weak support in the former Prussian area and in the new territories in the North and West. On the other hand, KO and the New Left have relatively high support in the former Prussian area and in the new territories and low support in the former Russian and Austrian parts. The support for the Third Way is relatively evenly distributed. The differences in turnout are low and only significant in the former Prussian part (high) and in the new territories

**Figure 5: Vote for the New Left in 2023 on the county level**




Source: Authors (based on the data from National Electoral Commission)

**Figure 6: Vote for the Confederation in 2023 on the county level**




Source: Authors (based on the data from National Electoral Commission)

**Table 1: Turnout and party vote in regions. Electoral results in 2023**

| | Turnout | PiS | KO | Third Way | New Left | Confederation |
|---|---|---|---|---|---|---|
| Total | 71.43 | 39.64 | 27.06 | 14.65 | 7.39 | 7.25 |
| Prussian partition | 73.34 | 32.71 | 32.40 | 15.56 | 8.50 | 7.06 |
| Russian partition | 72.17 | 45.41 | 21.29 | 15.14 | 6.76 | 7.48 |
| Austrian partition | 71.07 | 49.93 | 18.57 | 14.21 | 4.96 | 8.58 |
| Land acquired in 1945 | 69.06 | 32.85 | 34.36 | 13.45 | 8.43 | 6.50 |

Source: Authors (based on the data from National Electoral Commission). Data in %. Shaded cells: independent-samples test of equality of means significant at p<0,01 or lower. Reference value: mean for the other categories in the column.

## *Determinants of party vote*

The multiple regression models are constructed to explain the sources of support for the five electoral committees at the county level. The dependent variable is the percentage of votes given for a party in a county.

The independent variables in all models are economic factors (mean earnings, registered unemployment), religious practice (attendance at Sunday religious service) and urban character (whether the county is a city). Urban populations are distinct from rural both in economic terms (higher proportion of employees in white-collar jobs) and in cultural terms not captured by the other variables.

Model 1 tests the hypothesis on the clientelist sources of support: the independent variables include the per capita state subsidy and per capita revenue.

Model 2 introduces the three variables denoting one of the three partitions; where the current boundaries of the county overlap the former partition boundaries, the location of the county capital was selected as the determinant. This model tests the 'theory of partitions'.

Finally, model 3 contains economic and cultural variables with the variable denoting a county in the new territories, to determine the voting specificity of these areas with historical discontinuity.

Model 1 indicates that there is a strong influence of both economic and cultural factors in the vote for the two biggest political groupings, PiS and KO. These two are a mirror reflection of one another in terms of territorial distribution of votes. PiS support is concentrated in areas with high unemployment, with high levels of religious practice, outside of the cities. Support for KO is strongest in cities, in areas with low unemployment and in counties with low levels of religious practice. These factors exert independent influence. The hypothesis about clientelist party support is borne out: higher subsidies per capita are associated with greater support for PiS, the Third Way and Confederation and lower support for KO and the New Left. Wealthy (high-revenue) counties tend to vote KO.

NL is strongest in cities and in areas with low religiosity and the Confederation vote is largest outside of the cities, in areas with a high proportion of churchgoers. Thus, the support for the New Left is somewhat similar geographically to the KO strongholds, but without the economic dimension, as the level of unemployment is not a significant predictor. The support for Confederation is concentrated geographically in the areas where PiS is strong, but unemployment is not a significant predictor.[3] The Third Way is a coalition of two different

3 This does not mean that the electorates of KO and New Left or PiS and Confederation have a similar socio-demographic structure. Research on the individual level (Kesler 2023) indicates that gender and age are important predictors of support for NL and Confederation. Both parties are disproportionately supported by young voters, men declaring the vote for Confederation more often than women. On the other hand, PiS supporters are disproportionately old, with pensioners a core constituency.

**Table 2: Regression models. Dependent variable: Party vote**

| | PiS | KO | Third Way | New Left | Confederation |
|---|---|---|---|---|---|
| | Beta | | | | |
| Model 1 | | | | | |
| Earnings (PL=100) | -0.150 | 0.000 | -0.036 | 0.010 | 0.062 |
| Registered unemployment (PL=100) | 0.219 | -0.130 | -0.222 | -0.035 | -0.066 |
| City (town with county rights) | 0.285 | 0.341 | -0.292 | -0.046 | 0.569 |
| Religious participation (Dominicantes) | 0.498 | -0.506 | 0.061 | -0.500 | 0.557 |
| County revenues per capita | -0.506 | 0.621 | 0.84 | 0.368 | -0.824 |
| County subsidies per capita | 0.263 | -0.318 | 0.188 | -0.145 | 0.148 |
| R sq | 0.569 | 0.519 | 0.094 | 0.438 | 0.400 |
| Model 2 | | | | | |
| Earnings (PL=100) | -0.134 | 0.130 | -0.051 | 0.079 | -0.015 |
| Registered unemployment (PL=100) | 0.200 | -0.138 | -0.102 | -0.022 | -0.076 |
| City (town with county rights) | -0.243 | 0.308 | -0.247 | 0.322 | -0.263 |
| Religious participation (Dominicantes) | 0.323 | -0.335 | 0.028 | -0.533 | 0.413 |
| Prussian partition | -0.005 | -0.076 | 0.291 | 0.089 | 0.100 |
| Russian partition | 0.470 | -0.545 | 0.264 | -0.098 | 0.252 |
| Austrian partition | 0.244 | -0.243 | 0.064 | 0.063 | 0.214 |
| R sq | 0.709 | 0.734 | 0.140 | 0.451 | 0.408 |
| Model 3 | | | | | |
| Earnings (PL=100) | -0.084 | 0.083 | -0.061 | 0.059 | 0.000 |
| Registered unemployment (PL=100) | 0.309 | -0.240 | -0.124 | -0.065 | -0.043 |
| City (town with county rights) | -0.258 | 0.325 | -0.249 | 0.332 | -0.264 |
| Religious participation (Dominicantes) | 0.367 | -0.337 | -0.070 | -0.481 | 0.473 |
| Land acquired in 1945 | -0.277 | 0.358 | -0.280 | 0.031 | -0.183 |
| R sq | 0.587 | 0.621 | 0.129 | 0.424 | 0.396 |

Source: Authors (based on their own calculations). Shaded cells: Beta coefficient significant at p<0.01 or lower.

entities, the Polish People's Party and Poland 2050. In structural terms, it is a rural grouping, with support outside of the cities. The Third Way is the only grouping whose support is not influenced by the relative religiosity of the area. Model 1 has the lowest predictive power in case of this coalition.

Model 2 has higher explanatory power than Model 1 in all cases, which indicates not only indirect (via economic development and secularisation), but also direct influence of partition legacies. Being a former Russian or Austrian area has an independent influence on the support for both PiS and KO. PiS is stronger in these areas and KO is weaker, when other factors are controlled for. The influence of Prussian partition is insignificant, indicating a lack of a significant difference between former Prussian lands and the area not included from the analysis in these models, i.e. the new territories. Confederation, like PiS, is relatively stronger in the former Russian and Austrian areas.

Model 3 tests the importance of the legacies of post-war population transfers. The new territories are a stronghold of KO, while PiS, the Third Way and Confederation have relatively less support in the counties located in the northern and western Poland.

Finally, we check the relative importance of the economy (variables relating to wealth and unemployment), culture (variables measuring the level of religiosity) or historical region. For this purpose, we have performed an interaction analysis (Table 3).

First, wages and unemployment affect political preferences regardless of the historical region, but their impact is significant only in the case of voting for PiS and KO. The wealth of the county decreases and religiosity increases the level of support for PiS. This relationship is inverse for KO.

Moreover, there is no single pattern of relationships between interacting variables: the influence and relationships between variables are different for different partitions and different parties. In the Russian partition, only the interaction between the Russian partition and the frequency of religious participation is statistically significant. It shows that in religious districts in the Russian partition the tendency to vote for PiS and Confederation is higher, while the propensity to vote for KO and the New Left is lower. In the Austrian partition, significant interactions concern remuneration: higher remuneration reduces the chances of support for PiS, and it increases the scores of the Third Way and the New Left. The interaction between the Austrian partition and the regularity of religious practices and their impact on voting for the Confederation is also significant. Although the relationship is negative, it only flattens out the very strong positive impact of the interacting variables. In the Prussian partition, the influence of economy, culture and history are independent of each other. Only the frequency of religious practices in this partition increases support for the New Left, but, as in the case of support for the Confederation in the Austrian partition, this only has a mitigating effect on the strong negative impact of religiosity.

**Table 3: Regression models with interactions. Dependent variable: Party vote**

| | PiS | KO | Third Way | New Left | Confederation |
|---|---|---|---|---|---|
| | Beta | | | | |
| Model 4 | | | | | |
| Earnings (PL=100) | -0.101 | 0.096 | -0.066 | 0.087 | -0.058 |
| Registered unemployment (PL=100) | 0.170 | -0.112 | -0.065 | -0.016 | -0.077 |
| City (town with county rights) | -0.258 | 0.321 | -0.246 | 0.333 | -0.273 |
| Religious participation | 0.185 | -0.224 | -0.023 | -0.347 | 0.181 |
| Russian partition | 0.314 | -0.502 | -0.029 | 0.667 | -1.065 |
| Austrian partition | 0.366 | -0.342 | 0.102 | -0.091 | 0.401 |
| Prussian partition | 0.022 | -0.098 | 0.312 | 0.047 | 0.153 |
| Earnings*Russian partition | -0.273 | 0.300 | 0.199 | -0.210 | 0.616 |
| Rel. participation*Russian partition | 0.452 | -0.357 | 0.223 | -0.673 | 0.867 |
| Unemployment*Russian partition | 0.051 | -0.046 | -0.120 | 0.030 | -0.056 |
| R sq | 0.723 | 0.744 | 0.146 | 0.466 | 0.444 |
| Model 5 | | | | | |
| Earnings (PL=100) | -0.104 | 0.126 | -0.119 | 0.050 | -0.010 |
| Registered unemployment (PL=100) | 0.196 | -0.123 | -0.135 | -0.014 | -0.117 |
| City (town with county rights) | -0.233 | 0.304 | -0.266 | 0.311 | -0.256 |
| Religious participation | 0.356 | -0.379 | -0.009 | -0.586 | 0.520 |
| Russian partition | 0.460 | -0.531 | 0.274 | -0.082 | 0.217 |
| Austrian partition | 1.632 | -0.729 | -2.873 | -1.427 | 1.148 |
| Prussian partition | -0.014 | -0.061 | 0.290 | 0.104 | 0.063 |
| Earnings*Austrian partition | -1.052 | 0.269 | 2.250 | 1.068 | -0.460 |
| Rel. participation*Austrian partition | -0.351 | 0.300 | 0.544 | 0.468 | -0.700 |
| Unemployment*Austrian partition | -0.028 | -0.045 | 0.230 | 0.015 | 0.141 |
| R sq | 0.722 | 0.738 | 0.187 | 0.464 | 0.429 |

| Model 6 | | | | | |
|---|---|---|---|---|---|
| Earnings (PL=100) | -0.130 | 0.107 | -0.023 | 0.082 | 0.016 |
| Registered unemployment (PL=100) | 0.210 | -0.144 | -0.109 | -0.035 | -0.062 |
| City (town with county rights) | -0.248 | 0.303 | -0.236 | 0.339 | -0.254 |
| Religious participation | 0.343 | -0.366 | 0.059 | -0.577 | 0.440 |
| Russian partition | 0.463 | -0.536 | 0.255 | -0.083 | 0.244 |
| Austrian partition | 0.228 | -0.220 | 0.043 | 0.100 | 0.195 |
| Prussian partition | 0.379 | -0.950 | 1.138 | -0.458 | 1.095 |
| Earnings*Prussian partition | -0.072 | 0.511 | -0.614 | -0.107 | -0.668 |
| Rel. participation*Prussian partition | -0.261 | 0.350 | -0.292 | 0.576 | -0.291 |
| Unemployment*Prussian partition | -0.069 | 0.033 | 0.049 | 0.110 | -0.058 |
| R sq | 0.712 | 0.740 | 0.148 | 0.444 | 0.414 |

Source: Authors (based on their own calculations). Shaded cells: Beta coefficient significant at p<0.01 or lower

Summing up, as regards the support for PiS and KO, economics and religion are of key importance, but the influence of these variables is strengthened by belonging to the Russian and, to a lesser extent, Austrian partition. Support for other parties is explained by a combination of culture (religiosity) and historical traditions.

## Discussion

First, let us briefly summarise the results. The analyses on the county level confirm the earlier individual-level observations about the voting behaviour of Polish citizens. Cultural factors play a crucial role in determining party choices. In our study, religiosity, as measured by participation in Sunday service, was a significant determinant of vote for all major parties except for the Third Way. It forms a crucial axis which determines the propensity to vote. KO and NL are relatively strong in areas with low levels of mass attendance, while PiS and Confederation are relatively strong in religious areas.

Structural factors also play a role in determining the propensity to vote for one of the main parties. Areas with high unemployment yield strong PiS results, while the counties with a better labour market tend to vote KO. Differences in earnings have a more limited impact, partly because variance in unemployment rate is much higher than the variance in earnings. KO is disproportionately

strong in cities, while PiS support is concentrated outside of them. Counties with high levels of state subsidies yield significantly higher vote results for PiS, Third Way and Confederation and lower scores for KO and the New Left. Higher revenues are associated with a high vote for KO.

Economic development and secularisation are indirect indicators of the legacies of partitions. However, there is also a direct effect, i.e. the regions have clearly different voting patterns even when other factors are controlled for. The former Austrian and Russian partitions display different voting patterns than the Prussian part and the new territories. There is an east-west axis in terms of electoral behaviour. The former Russian and Austrian partitions are areas of particularly strong support for PiS. Of course, this is the net result: on the aggregate, KO was able to achieve very good results in economically developed cities, especially Warsaw and Kraków. The structural factors such as high earnings and low unemployment favour this party and are stronger that the partition effect.

Our research leaves several questions unanswered. First, the 'theory of partitions' does not explain the similarities between the former Russian and Austrian areas. These two regions were, in the 19th century, parts of very different empires in terms of economic and political development. The Austrian partition was characterised by relative liberalism and national autonomy, and even a privileged status for Poles, as opposed to the increasingly authoritarian Russian regime (Kieniewicz 1970: 306 ff.; Davies 1997: 829). Future explanation should probably search for reasons of similarity in voting behaviour in economic underdevelopment and conservation of premodern socio-economic structures, especially agrarian.

Likewise, the Prussian areas and the new territories show far-reaching similarities: KO and the New Left are overrepresented there and PiS is relatively weak. In terms of pre-war historical legacies, these regions have few similarities. Their commonality can hypothetically be explained by post-war economic development and population exchange. This is an area for future investigation.

In our approach, cities are assumed to be different from the rural and semi-rural areas in both quantitative and qualitative terms. Following Castels (1983) and Florida (2005), they may be viewed as the locus of both economic and social progress. By implication, they are populated by the elites. Let us consider the reverse side: representation of the underprivileged regions, i.e. populations outside of the big urban centres. This dimension is a significant factor in voting behaviour. Three groupings are significantly stronger outside of the big cities: PiS, the Third Way and Confederation. Two of them, i.e. PiS and Confederation, are also relatively strong in areas with strong religious participation. The Third Way, on the other hand, is an outlier in our analysis. It is a strong force outside of the cities, but its support does not depend on the strength of the Catholic Church. It transcends the axes of partition legacies: unlike PiS and Confederation, it is relatively strong both in the former Prussian and Russian

partition. The Third Way is a coalition of two different political parties: The Polish People's Party has solid structures in the countryside, while Poland 2050 is a new party without clear areas of strength. The last elections prove that this coalition was able to build support across the cultural divide (religiosity) and across legacies determined by the partitions. If we were to interpret its results further, it is clear that PSL is the more institutionalised component of the coalition. Our other county-level analyses (results not shown here) indicate that areas of support of the Third Way are locations with strong PSL results in earlier parliamentary elections. Moreover, the PSL legacy influence is reflected in the government building process, in which the Third Way is in coalition with the two former partners of PSL, i.e. the Civic Coalition (2008–2015 cabinets) and the Left (1994–1998 and 2001–2003).

Last but not least, it is difficult to separate the influence of economics, culture and historical factors. In most cases, support for particular parties is the result of all these factors. Even in the case of PiS and KO, for which economic variables are particularly important, belonging to the Russian or Austrian partition only strengthens their impact. The results of our study confirm the 'partition theory' as indirect influence (the persistence of historical area as a determinant of the vote), i.e. are consistent with the assumption about the historical roots of contemporary economic and cultural differences.

## Appendix: Data sources

Voting results were obtained from the National Electoral Commission. Data are available online: https://wybory.gov.pl/sejmsenat2023/en [Access: 9. 11. 2023].

Data on unemployment, earnings, revenue of local government units and financial aid provided by the state for important social reasons were obtained from Local Data Bank of the Central Statistical office. Data are available online: https://bdl.stat.gov.pl/bdl/start [Access: 9. 11. 2023].

Data on religious participation were prepared by the Institute for Catholic Church Statistics. The analysis used the indicator Dominicantes. It is the percentage of obliged Catholics taking part in the Holy Mass on the day of data collection, which was 26 Sept. 2021. The published data were on the level of diocese. For data harmonisation we attributed the diocese averages to individual counties within the dioceses. In case of county boundaries overlapping the diocese boundaries, we selected the location of the county capital to attribute the score to the county. Warsaw belongs to 2 dioceses: we selected data for the Warsaw diocese (on the left bank of the river Vistula) to attribute the score, as most Warsaw residents live within it. Source: ISKK 2022.

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# The rise of nativism in populist political communication: A case study of the Facebook communication strategy of Freedom and Direct Democracy during the 2021 Czech parliamentary elections

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**Abstract:** *The 2021 elections to the Chamber of Deputies of the Parliament of the Czech Republic brought a shift in populist political communication. While previous research has shown that the emphasis is on accentuating the theme of migration, the 2020 Senate elections have indicated that attention is shifting to patriotic themes. This was confirmed by the 2021 elections to the Chamber of Deputies, when nativism became a key element of populist political communication in the Czech Republic. The research included data from the hot phase of the campaign and two election days (8 and 10 October 2021) and focused on the populist political communication of the Freedom and Direct Democracy movement on Facebook.*

**Keywords:** ***populist political communication, nativist discourse, argumentative strategy, Freedom and Direct Democracy, critical discourse analysis***

## Introduction

It is undeniable that in Western democracies, including the Czech Republic, populist parties have achieved considerable electoral success in recent years. Populist political actors are increasingly holding high positions of power, whether they be prime ministers or presidents. But successes are also being recorded by radical populist right-wing parties that now form an integral part

of parliamentary representation across Europe. Populists situate themselves as representatives of the voice of the people, using the narrative of a nation (the good people) in danger, both from evil elites and from some excluded, dangerous groups of 'others'. They come with an emotional, combative, desperate, negative rhetoric swept up in a wave of nationalism, patriotism and xenophobia. It is here that the political discourse of nativism is increasingly articulated.

Populist political actors articulate the nativist perspective as primarily concerned with preserving or restoring partial aspects of native (indigenous) culture, or building cultural unity (Mudde 2007), in response to perceptions of external threats. Populism in this communicated form has crossed the boundaries of xenophobia and transformed into a form of cultural nativism, which is meant to prevent the loss of cultural identity. In their communication, particularly but not only on social media, populist actors make full use of the narrative of a nation at risk (the populist pillar of the people), often in the context of the migration crisis. This is also the case with the communications of Tomio Okamura, chairman of the Freedom and Direct Democracy political party (hereinafter referred to as 'SPD').

Using the specific example of populist political communication of the SPD on the social network Facebook, we will look for expressions of the nativist approach and policy with the help of critical discourse analysis, as well as the argumentation strategies used in the communication line of nativism. First, using quantitative content analysis, contributions that can be described as populist will be selected,[1] which will then be submitted for qualitative content analysis. The research will include data from the so-called hot phase of the campaign, i.e. 14 days before the election, and the two days of the election itself. Thus, the period of time examined was from 24 September to 9 October 2021 inclusive. The results of the research present the individual elements of the communication and argumentation strategy used in the communication line of nativism, in addition to focusing on the portrayal of the populist dichotomy of us vs them, which manifests itself in the search for a common enemy that is as abstract as possible in order to focus general anger on it.

## Nativism

Nativism can be understood as an ideology,[2] a particular construction of nationalism (Guia 2016). It is often seen as a dangerous and aggressive ideology rooted in racism and populism (Riedel 2018: 18). In general, nativism is based on beliefs that nation-states should consist exclusively of indigenous, homogeneous groups of people, be monocultural, namely without the influence of foreign,

1 In order to be labelled populist, they must bear the characteristics of at least one of the three populist pillars – the people, the elites or the 'other' group.

2 Originally, nativism was mainly associated with developments in North America (Katerberg 1995: 495).

non-indigenous cultures, religions, ideas and minority persons belonging to the populist pillar of the 'others' group (Schwörer & Fernández-García 2020), as a consequence of which it is necessary to protect the interests of indigenous peoples,[3] native culture and way of life from the possible influences mentioned above (Knoll 2018), and from potential cultural and economic harm (Gratton 2018; Zhao 2019).

The essence of nativism is deeply rooted in populist logic; populism and nativism exhibit some common elements, as a result of which the terms *nativism, nationalism* and *populism* can be confused and merged (Riedel 2018: 18). In addition, populists skilfully use traditional tools of populist and far-right actors in their communication, such as anti-EU attitudes, and appeals to 'normality' in the case of gender and family issues (Cabada 2021).

Populist political actors also use the image of a polarised society in their communication, i.e. the dichotomous construct of us vs 'them', two antagonistic groups, where the pure, uncorrupted people are contrasted with the construct of evil, corrupt elites and maladjusted 'others'. In order to legitimise their positions (recognition of the dominance of the native population and culture), they apply an argumentative strategy of inducing fear and a sense of threat, or threat from the 'others' (non-natives). The idea of a culturally homogeneous society necessarily implies a negative attitude towards European integration, which leads to a loss of national identity and sovereignty. And the countries of the so-called Visegrad Group seem to be an example of a trend where nationalist and xenophobic sentiments have returned to the mainstream of Central European politics (Riedel 2018: 18–19).

## Data

The analysis covers the period before the 2021 elections to the Chamber of Deputies in the Czech Republic. The 2021 parliamentary elections took place in the spirit of a referendum on Andrej Babiš. This was underlined by the candidacy of a number of opposition parties in coalitions, from which these parties hoped for stronger electoral support. Otherwise, the key to the electoral success of the opposition parties was the necessity of a high voter turnout, which was eventually realised. The turnout was 5.4 million voters, or 65.43% of those eligible to vote. This was an above-average turnout, and the highest since 1998. Candidates from four parties entered the Chamber of Deputies, with SPD winning 9.56% of the vote, confirming its stable electoral support, which has been hovering around the 10% of the voters. As a result, the SPD earned 20 seats in the lower house, two fewer than in the previous elections.

3 The definition of indigenous peoples is based on references to shared historical and cultural traditions (Mudde 2007).

While in the previous elections to the Chamber of Deputies in 2017, political campaigns were dominated by billboards, the handing out of leaflets, and also contact campaigning in stands in town squares (contact campaigns in the 2021 elections were significantly reduced by the Covid-19 pandemic), campaigns in 2021 shifted significantly to social media. 'Political campaigns have expanded into many previously ignored media formats (video blogs, podcasts, small online media, social networks)' (Transparency International 2022a: 4). A new phenomenon – the so-called lifestyle governance – which was introduced by the ANO and ČSSD coalition government, has emerged. However, this trend of misusing public functions with the application of product marketing on social media was on the edge of the law (Transparency International 2022b). There have also been abuses of civil servants in election campaigns. The most famous borderline case is the post made by Alena Schillerová, then minister of finance, who was photographed astride the bonnet of a Customs Authority car. Although the ANO movement was identified on social media as the advertiser, the posing of two members of the Customs Authority was problematic. The Office for Supervision of the Financing of Political Parties and Movements investigated everything, but found no wrongdoing (Rambousková 2022).

Pre-election surveys have shown that SPD spent CZK 79 million (cca EUR 4 million) on pre-election campaigning, making it the fourth highest-spending entity after the SPOLU coalition, the ANO party and the PirSTAN coalition. Okamura invested CZK 1.5 million of that amount in political advertising on social media, namely Facebook and Instagram (Scribbr 2022). From 8 August to 20 September 2021, Okamura increased the number of paid posts to 1632, which equates to 54 ads per week. Thus, he became the second most expensive electoral profile after that of Petr Fiala, the leader of the SPOLU coalition and later prime minister. Okamura bought 21 million impressions, while the total number of Facebook and Instagram users reached was 1.59 billion, with an average of 974,000 impressions per ad.[4] This is evidenced by massive proliferation and response generation among users, algorithm targeting, political advertising and systematic activation of the supporter community. Thanks to this, Okamura's profile has seen an increase of 15,000 followers the six weeks before the election, which can be considered an eminent mobilisation success (Transparency International 2022b). The deliberate targeting of regional advertising was also evident. Okamura focuses on mobilising voters primarily from regions with socio-economic problems and an age of 65+, so it is not surprising that the highest number of paid posts in the political campaign occurred in the Moravian-Silesian and Ústí nad Labem regions, where Okamura was the

4 To provide a point of reference, Petr Fiala bought 44 million impressions, but the reach was 'only' 243 million in stark contrast to Okamura's numbers.

second most active advertiser after the then Prime Minister Babiš (Transparency International 2022b).

The quantitative content analysis of Okamura's Facebook communication was conducted on 158 posts with a total length of 39,167 words. Compared to the second-order elections (European Parliament 2019 and Senate and Regional Councils 2020), this is the highest number of shared posts.[5] On average, Okamura made 9.9 posts per day. The most posts in a day were eleven, which occurred on seven days. A long-term trend in Okamura's communication is the addition of a video or image attachment to individual posts. The amount of user reactions, whether likes or comments, was high. Users have given posts a total of 423,078 likes and commented on them a total of 71,673 times. Posts with image attachments had a total of 43,930 shares.[6]

For the primary classification of Okamura's media outputs on Facebook in terms of their relevance for further research, a quantitative content analysis method was chosen to help classify populist status. To be classified as populist, a message had to have at least one of the following characteristics: references to the people, the elites or the 'others', including references to popular sovereignty, direct referendum, elements of Euroscepticism, attacks on the media, nationalism or patriotic appeals. In Okamura's case, about 73% of the content bore the hallmarks of populism.

Even if the message did not bear signs of populist rhetoric, it was mostly a statement about selected events, including from the Chamber of Deputies, an invitation to watch Okamura's appearances on television or other media, or sharing experiences from the novelty of this election – Okamura's Czech Fair ('Český jarmark SPD'; SPD 2021). As part of his pre-election communications, Okamura distributed flyers with cheap food to his Czech Fairs, which were held in August and September 2021 in regional towns across the country. The advertising leaflets presented the sale of products of Czech farmers at fair prices, lower than in large supermarket chains. At the fairs themselves, however, it was impossible to determine the origin of the fruit and vegetables (yet, for example, cheap onions sold out at the first fair within two hours). Experts agreed that selling produce at these prices would not be profitable for farmers at all. At first the event functions as a market with cheap food, then there is political agitation, where individual representatives of the SPD party appear on stage (Janáková 2021). This way of supporting and promoting Czech food and farmers at election fairs, a nativist line of communication, also became one of the pre-election strategies to justify – in a generalising statement – the

5 In the run-up to the 2019 European Parliament elections, there were 134 status updates, and before the 2020 Regional and Senate elections there were 124 posts.

6 Sharing could only be measured for image attachments, and only the number of views was reported for videos.

necessity of enforcing a law that would no longer make the Czech Republic an agricultural 'dependent colony':

> We support Czech farmers and Czech food. What about you? The European Union has destroyed Czech agriculture. It is in a catastrophic condition. Zdeněk Jandejsek, a former president of the Agricultural Chamber and a successful farmer, pointed to the disastrous state of Czech agriculture, where we are not self-sufficient in terms of food, where farmers from Western Europe receive much larger subsidies, and where comparable Western European countries produce much more food and have made us a dependent colony. The facts below are alarming! This is why we are pushing for a law to support Czech food and farmers and also why we promote Czech farmers at our fairs! (Okamura 2021a)

Hence, the patriotic, or nativist, discourse in Facebook communication is built on the principle of traditional, or national, values. Primarily one can encounter the glorification of Czechism and everything originated in the Czech Republic (see e.g. the post above). One of the central points of the communicated manifesto is that 'The Czech Republic and a decent and working citizen come first! We cannot steal from our country!' (Okamura 2021b). However, patriotism also masks xenophobic views ('we love the Europe of free nations and Christian European civilisation. We do not want an Islamicized, do-gooder totalitarian European Union that is killing European nations and Christian European civilization!' (Okamura 2021c)) and are moreover adored as a moral value (ibid.).

In the analysed sample there are pseudo-argumentation strategies that were already used in the period before the European Parliament elections in 2019 (Charvátová & Niklesová 2020), as well as other strategies, such as the overuse of the possessive pronoun 'our', whether it is our nation, our culture, our traditions or our values. The communication is about promoting a narrative of the need to protect 'our safe home', 'our country' from evil 'outside' influences, such as 'the main points of the manifesto called "Our Country, Our Family, Our Safe Home" are the promotion of family and traditional values and national sovereignty. We will protect our nation and our state' (Okamura 2021d). This work with fear (among other things, the purposeful conjuring up of images of a possible state of war) is often combined with a description of how to cope with a difficult situation. Part of the communication includes considerations of the need to build a strong military that will be able to protect 'our' commodities and wealth from hostile 'outside' influences. In terms of rhetorical strategies, the hot phase of the campaign is dominated by the repetition of key words, a suggestive speech device in the form of repetition of the same or synonymous terms ('support'/'supporting', 'protection'/'protect', 'our'/'ours' state/country/territory/border).

Traditional nativist culture is highly idealised and contrasted with the dangerous uncivilised culture of the 'other' group, which is most often brought by refugees (see picture) or members of the LGBT+ group. In these types of posts, traditional irrational means and strategies (hypothetical threats, working with fear, emotions and ideas, etc.) are used to persuade the formation of attitudes and opinions, which can be classified as a 'flawed argument'. This is in particular an argumentum ad baculum, used to 'induce fear and terror' (Szymanek 2003: 55).

An example of this line of argumentation is the narrative of the traditional family, which is threatened by gender. The threat here is represented by the discursive construct of the dangerous and excluded LGBT+ group, which represents a distinct specificity of the period under study. The SPD party has articulated family first as one of its main election slogans, with members of the LGBT+ group being accused in communications of threatening the values of the majority society, identity and people's rights. The discourse of LGBT+ and gender ideology also serves as a tool to discredit the elites because of their views and attitudes on the issue. Although there was a partial tendency to distance oneself from xenophobic attitudes in the statement below, we get a hint of the prevailing viewpoint of the addressee.

> the definition of gender ideology; Gender ideology claims that gender is a construct and is arbitrarily selectable regardless of biological characteristics. But everyone knows that there are two sexes – male and female. The others are identity issues. And everyone knows that only a man and a woman can get married and start a family. We should have compassion for these people with different preferences, but their lifestyle must not become a norm or a model for society to admire, sexual orientation is a private matter for everyone. The SPD party rejects the persecution of homosexuals, and believes that homosexuals have the right to the same civil liberties as other citizens. The greatest danger to homosexuals as persons today is the hateful religion Islam, which advocates the death penalty for homosexuality. According to the SPD party, the foundation of the state is the traditional family in which mum and dad raise their children. The traditional family deserves all-round support and protection from the state. Same-sex unions cannot replace male and female role models and their compatibility for children (ibid.) or "everyone knows that only a man and a woman can get married and start a family. We should have compassion for people with different sexual and "gender" preferences, but their lifestyles must not become the norm or a model for society to admire. Same-sex unions cannot replace male and female role models and their compatibility for children (Okamura 2021e).

**Figure 1: An example of a Facebook post with the appeal to protection of Czech national culture against so-called foreign influences, especially migration**


Source: Okamura 2021f

In order to provide an apparent argumentative support, references to historical parallels and events, as well as references to Christian values, are used to declare the above statements. References to historical parallels have a single and clear goal – the 'brave' defence of 'our' homeland (cf. e.g. 'we must once again bravely defend our homeland like our ancestors!'), using the means of voluntary modalities. It is also the use of the ab exemplo argument, the essence of which is to appeal to 'such an example in which the properties of an element are referred to and as a sufficient premise for the confirmation of a given thesis' (Szymanek 2003: 51). At the same time, a false analogy is created, for which reference is made to key historical events that are generally known and which are among the most serious in modern Czech history. In this way of erroneous argumentation, the producer can purposefully influence social groups; his statement is calculated for effect, using – as mentioned above – emotions, especially fear and threat (argumentum ad baculum), means typical of

demagoguery (Szymanek 2003: 93) and populism, 'demagogic argumentation aimed at winning the crowd', using 'simplistic thought processes appropriate to the mindset of that crowd' (Ibid: 64). With the aim of reconstructing historical narratives (cf. Cabada 2021), references are used to personalised icons of 'our' history, especially St. Wenceslas, together with the reference to the aforementioned Christian values, or the Czech Republic's belonging to 'European Christian civilization'. The cult and legacy of St. Wenceslas, the fame of the symbol of statehood, represents a significant and constant component of the pre-election communication strategy in the context of the analysed period, while this reference to a significant historical figure can also be understood as a pseudo-argumentative strategy of argumentum ad verecundiam, 'an obscure argument from authority', whereby 'the acceptance of the conclusions of such an argument does not take place in the factual analysis and consideration of the evidence, but solely by way of submitting to the psychological influence of definitions that make an impression' (Szymanek 2003: 66).

Within the analysed hot phase of the campaign we can see a stable communicative and argumentative element, namely a comparative approach to the representatives of the elite group. Emphasis is placed on the polarising tendency namely within the narrative of the correct direction of SPD, which is supposed to guarantee the security and sovereignty of Czech citizens, vs other members of the elites who threaten the aforementioned with their attitudes. An example of this tendency is the expressive rejection of the adoption of the Euro. The Euro is supposed to damage 'our economy' and be 'the final nail in the coffin of our sovereignty' (Okamura 2021g). At the same time, it points to the different approach to adopting the Euro prevalent among political rivals:

> Adopting the Euro would fatally damage the Czech Republic. At the same time, its adoption is supported by Babiš and the "Democratic bloc"... SPD is the only party in the lower house that is fundamentally opposed to the adoption of the Euro. Adopting the Euro would significantly damage our economy and would be one of the last nails in the coffin of our sovereignty. The other parties will support the adoption of the Euro sooner or later. (Okamura 2021g)

All of this is usually combined with denigration of political competitors, the posts also being formulated with a high degree of expressiveness, again using fear and threats, and there is also a false analogy. The image of the enemy is created to support the attack using war metaphors (the verb 'to fight'), that the Czech Republic is under threat by accepting the 'dictates of Brussels', all against the background of the declared comparison of the election manifestos of the SPD and ANO parties. In other cases, there is also an example of clear visual support, where an identical image of the enemy of Czech sovereignty is created (see image).

A comparison of the manifestos of the SPD and ANO parties. SPD is for leaving the EU and for a referendum, the ANO movement is against leaving and against a referendum, and Babiš clearly supports the EU. SPD is fundamentally opposed to the adoption of the Euro and **is** fighting to preserve the koruna, while Prime Minister Babiš and ANO are not opposed to the adoption of the Euro in the future. SPD are patriots, while Prime Minister Babiš will eventually kneel before the dictators of Brussels. (Okamura 2021h)

**Figure 2: An example of a Facebook post with comparison of the programmes of political parties (SPD and the coalition SPOLU) as 2021 elections**


Source: Okamura 2021h

Moreover, the image of the enemy is repeatedly created by comparing the approaches to the issue of migration and Islam as conceived by SPD and other elite representatives. In the spirit of Dijk's ideological square, the scheme of 'us' (SPD), i.e. those who reject Islam and migration, vs 'them' (e.g. ANO), supporters of accepting migrants, is represented and supported. The enemy is often personalised in the person of the then prime minister who is supposed to have supported the admission of the migrants. At the same time, it is implied that these refugees may include 'terrorists and criminals', who pose a danger to the native population. It has also been reported (without specific data) that Babiš had accepted Islamic Afghan migrants into the Czech Republic, but those statements are unverifiable. The blackening of a political rival's image is implemented by pointing out the contradiction between Babiš's media image (pretending to protect 'national interests') and his decisions that have/may have a direct impact on the security situation in the Czech Republic.

> SPD fundamentally rejects the acceptance of immigrants and Islam. Andrej Babiš supports the Organization for the Support of Refugees, he supported the Global Pact for Refugees and the Marrakesh Declaration, and ANO MEPs voted in favour of supporting migration. Moreover, the Prime Minister has now supported the hiring of Afghan "interpreters". France, Britain and Germany have already warned that terrorists and criminals can be found among the Afghan evacuees. Prime Minister Babiš did not support our law banning the wearing of Islamic veils in public and banning the promotion of hateful Islamic ideology. (Okamura 2021i)

> While Prime Minister Babiš is having his photo taken with Viktor Orbán and talking about border protection, he has also taken in Islamic Afghan immigrants. (Okamura 2021j)

> Andrej Babiš is playing the role of defender of national interests, but in Brussels he undoes everything. The EU is not helping, rather it is damaging. The sooner we leave it, the better. SPD advocates sensible environmental protection, not on the basis of dictated terms from Brussels, but on the basis of the realistic needs of our citizens and our economy. (Okamura 2021k)

Okamura works with positive connotations when considering the Czech Republic's withdrawal from the EU, and at the same time with the presupposition that, in terms of the current situation, the requirements for freedom, self-sufficiency, prosperity and security of the Czech Republic are not being met. The EU, as the representative of the elites, is portrayed (again without any support in the form of expert sources) as the originator of the above negative, dangerous and 'harmful' factors, for which the symptomatic enumerative accumulation of synonymous terms with positive connotations is used (in the case of the Czech Republic's withdrawal from the EU). This strategy can be understood as a demonstration of Dijk's argumentative procedure with the aim of creating polarity, creating contrast, etc. (Homoláč 2009):

> If we don't leave the EU, Brussels will destroy us with mass immigration, do-gooder neo-Marxism and eco-terrorism. Of course we have to prepare for the exit. Our country will once again be free, self-sufficient, safe and prosperous. (Okamura 2021l)

The principle of gradations and hypothetical judgements without any facts to support the argument is also the basis for the statements that directly link the EU's support for its political rivals with the subsequent mass immigration and so-called genderism. This is not just a list of the negatives associated with the Czech Republic's membership in the European Union, but also a prediction of

the future development and direction of the Czech Republic if it remains in the EU. A flawed argument (argumentum ad baculum) is used with the intention to induce fear of possible developments that contradict the ideal of a closed and traditionalist society in which 'foreign' elements are not present (Cabada 2021).

## Conclusion

Based on an analysis of the populist political communication of the Freedom and Direct Democracy movement on Facebook in the 14 days before the elections to the Chamber of Deputies of the Czech Republic, it can be concluded that nativist elements represent one of the key communication strategies. Nativist visions became a solid part of the election agitation, and were – for example, as exemplified by SPD's Czech Fair mentioned above – also translated into a form of contact campaign taking place in Czech regional towns, whereby voting for the SPD was supposed to provide Czech citizens with a 'more favourable' future.

The whole analysed period was characterised by the promotion or creation of the nativist narrative 'we' (SPD) as the protectors and defenders of Czech wealth, security and property, and on the other hand, the image of the enemy was systematically created (among other things, by comparing the SPD manifesto with other 'enemies' of Czech sovereignty. The dominant strategy throughout the analysed period was thus to support or create the nativist narrative of 'we' (SPD) as the protectors and defenders of Czech wealth, security and property, and on the other hand, the image of the enemy was systematically created (among other things, by comparing the SPD manifesto with other 'enemies' of Czech sovereignty.

Towards the end of the hot phase of the pre-election campaign, the overall sharpening of the nativist communication strategy was evident, among other things through the use of abbreviated, punchy, expressive and hyperbolic slogans (e.g.: 'the total destruction of Czech society, the Czech nation and the Czech economy') with the aim of even more intensive and explicit support for the narrative of evil symbolised by the elites and 'the others', which would be represented by the election of other political parties. The threat of losing 'the last vestiges of independence', the strategy of inducing fear and threat from migration, the 'theft' of the Czech Republic by foreigners, the evil EU, etc. (argumentum ad baculum), the impossibility of autonomously influencing 'our' politics and the resulting destruction of the native society, and the subsequent offering of solutions to the unbearable situation (e.g. a referendum on the Czech Republic's withdrawal from the EU, which is possible if SPD is supported in the elections) were emphasised.

With the end of the pre-election period, SPD communication shows a greater degree of explicit outreach to potential voters and a deepening of persuasive influence on the final decision of (potential) voters.

In the future, it would be interesting to see whether this is a repetitive communication framework or communication strategy that has a similar character before different types of elections, or whether these narratives are changing in some way. It would also be useful to focus on researching the audience, how they react to the appeals and challenges and whether they identify with the above.

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# Patriotism among Slovenian Youth: Empirical Research

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**Abstract:** *Research in Slovenia shows a low level of expression of patriotism among young people, which points to the fact that we are unable to express this value because we are not convinced of its quality and necessity. The belief that we will love and respect our homeland, which has also been a state since 1991, is based on completely false assumptions. Those who were emotionally present at the founding of our country naturally have a keener sense of patriotism, but the younger generations see the emergence of an independent and sovereign Slovenia as a historical fact, and therefore without any emotional overtones. Therefore, the results on the poor knowledge of the facts related to the establishment of an independent and sovereign Slovenian state, analysed in this article, are not really surprising.*

**Keywords:** ***patriotism, citizenship, young people, political activism, Slovenia***

## Introduction

Slovenes are no strangers to patriotism, and even more, a cursory glance and a superficial knowledge of Slovenian history reminds us that we have often been able to show it clearly. Patriotism was what enabled the survival of a nation in times of extremes and, above all, self-preservation. Unfortunately, this cannot be perceived in everyday life to the same extent as in times of severe external pressures, in times of extreme forms of Roman and Germanic nationalism, or in the defence of the independence and sovereignty of the Slovenian state. While this is not unusual, as it is virtually impossible to maintain patriotism at such a high level of expression, the lukewarm response of young people to the

issue of patriotism, which has been highlighted in admittedly scarce research for some time, is worrying.

As a consequence of an increasingly fast-paced society, an important part of the socialisation of young citizens is being transferred from the family as the basic unit of society to schools, where young people spend more and more of their time. This is why it is important to pay more attention to the current state of the Slovenian education system and to point out any shortcomings, while at the same time looking for ways to further improve the situation in this area. We all remember the endless, years-long debates on the introduction of civic culture and ethics into the Slovenian primary school system. The polemic ended without any real result and, of course, without bringing about any change. Unfortunately, it has also failed to bring about major shifts in the understanding of patriotic themes.

Patriotism thus remains something that is largely left to the individual or the family. If patriotism is left to unorganised forms of deepening, the line – which is already quite thin and blurred – between patriotism and nationalism can be crossed quite quickly. As young people grow up, they are also identity-located in a wider space[1] and this is not possible without their own spatial definition, which is indirectly offered by patriotism. In this case, irreparable damage will be done, and our greatest patriotic symbols will be crippled in value, and consequently the patriotic potential that makes it possible to build patriotic foundations and a healthy patriotic self-confidence in the first place. This is clearly far too important a content to be improvised on the one hand or to do nothing on the other. Therefore, it is necessary to shake up patriotic content at the very beginning of the identity construction of citizens, which inevitably concerns the Slovenian education system (Kukovič et al. 2022).

## Literature review

Social science is concerned with the development of the individual in a social context, as long as this development is not harmful to the society in which the individual has developed (Altıkulaç 2016). There are binding social boundaries that are shaped by societies and manifested in the historical process, with values being at the top of the individual as well as of the society that controls the individual (Armstrong 1980). Values are therefore a concept to be respected, valued and admired (Venkataiah 2007); they are the motives that guide one's behaviour and that remain in one's consciousness. They can be described as mental phenomena that reside in the emotional domain and that control and direct our actions. Compared to beliefs and attitudes, values are more comprehensive and

1 For more on young people's European identity and the impact of Christian values on its formation, see Golob et al. (2019). For more on collective identities and identity politics, see Koller (2021; 2022).

more deeply embedded in the individual. From this point of view, the education of young people also means the development of their values in order to discover their individuality, the best form of existence and the attainment of human perfection. Venkataiah (2007) even argues that values education is primarily about ensuring an emphasis on humanism, but also about educating young people to think about other individuals and the well-being of their country (Reiners 2019: 36–38). To achieve this, young people need to experience social values, not as acts of manipulation, but as inspiration to people to choose their own social, ethical and spiritual values and to understand them more deeply. These values include (Altıkulaç 2016: 26; Fukuoka & Takita-Ishii 2021: 248) the importance of family, justice, freedom, diligence, cooperation, sensitivity, being scientific, honesty, aesthetics, tolerance, hospitality, giving importance to health, respectfulness, affection, responsibility, orderliness, willingness to help and being patriotic. There are different approaches to bringing each of these values to young people; we can use traditional methods of instruction and explanation, but it is more optimal to give them their own way of identifying and internalising the values.

Patriotism reflects an individual's attitude towards the nation and culture, so that the individual strives to achieve love for his or her homeland and nation, but has no intention of exercising aggression against other nations (Altıkulaç 2016). Different dimensions of patriotism can be found in the literature. One of them is given by Curti (Bourne 1977), who distinguishes between the militarist and the civil side of patriotism. Morray (1959) distinguishes between obedient (imitative) and disobedient (innovative) patriotism, while Sommerville (1981) distinguishes between ignorant (irrational) and oppositional (rational) patriotism. Adorno (Schatz et al. 1999) contrasts the ideas of supposed and genuine patriotism, where supposed patriotism implies blind loyalty and dogmatic compatibility, while genuine patriotism is based on a critical approach to the limits of national values and love of nation.

A similar division can be found in Staub (1997), who argues that there are two types of patriotism, blind and constructive. The first is characterised as showing dogmatic acceptance of and loyalty to a policy, regardless of whether the national policy and its actions are in conflict with human rights and the rights of other peoples. Blind patriotism varies from time to time and from society to society; the object of loyalty may be a country, a nation, a view or an ideology, but what is common is unconditional loyalty and service to that object. In blind patriotism, criticism of state policies is often considered treason, thus showing a tendency to resist change, to maintain a conservative mentality and to protect the status quo. It could be said that blind and constructive patriotism are indicators of differences in the democratic capacity of citizens. Democratic values and ideals are more related to cognitive values than to what we try to define as values of patriotism. The ideal situation in this case is for individuals

to approach each other's groups critically, in which they develop their capacity for loyalty and rationality (Altıkulaç 2016). Critical consciousness refers to an individual's ability to freely evaluate knowledge and perspective in relation to authority or society (Staub 1997). From this perspective, constructive patriotism challenges the *status quo*. Patriotism deals with feelings of loyalty that could hinder the active, critical citizen that a modern democratic state wants. From this perspective, the constructive patriotism described above (with its critical consciousness and concern for change) is a solution to such concerns. Thus, patriotism, enriched with democratic qualities, is not an obstacle to an active and participative citizen, but rather a support for him/her.

Although it is not the intention of this paper to delve (too) deeply into the forms of patriotic attitudes, when analysing the literature on the phenomena of patriotism, it seems that there are two key and contradictory concepts. Both are highly relevant to debates on educational policy in the field of home education; each of the two concepts also carries a political connotation, which naturally influences what young people learn about patriotism, civic duties and democracy. We will call those manifestations of patriotism authoritarian and democratic (Westheimer 2006).

Authoritarian patriotism is the abandonment of one's own will, the right to choose and the need to understand authority – its emotional foundation is gratitude for being (having been) relieved of the burden of democratic responsibility. Authoritarian patriotism requires unquestioning loyalty: loyalty to a goal, a cause, a principle, defined by a leader or a leading group. Such patriotism requires commitment to the governing principles and therefore opposes dissent and opposition. Meanwhile, democratic patriotism is based on truth and loyalty – not to the ruling power, but to the principles that underpin democracy. Concern for the essential values that underpin democracy is a fundamental feature of democratic patriotism. This does not mean, of course, that democratic patriotism leaves no room for symbolic displays of support and solidarity. On the contrary. Democratic patriotism is not only about adherence to a nation, its symbols and its political leaders of the present and the past, but also to every member of that nation and to the well-being of fellow countrymen. The true foundation of democratic patriotism is the right to diversity of opinion (Callan 2009: 60–62).

Patriotism is defined by most authors as a positive emotion and feeling towards the country to which one belongs. Archard (1999: 158) describes patriotism as a genuine love and deep respect for one's country and its heritage. Love of country is most often described as an individual's impeccable inclination to act – often at self-sacrifice – for the sake of his or her country. Nathanson (1997) argues that patriotism consists of four main components, namely: a) special affection for the country; b) defining oneself through one's country; c) interest in the welfare of the country; d) sacrifice for the welfare of the country. Patriotism shares with nationalism the same value base – nations exist, and the

existence of one's own nation has a special moral value for the individual, and therefore a nation is worthy of special affection and action in favour of one's own nation. That is why every nationalist is surely also a patriot. A patriot is committed to his/her own country and nation, but not every patriot is necessarily a nationalist in the sense of seeking harmony between the nation and the state (Folvarčný & Kopeček 2020: 163–164). In contrast to nationalism, patriotism contains an element of political society that is concrete evidence of a nation or a state. Here we recall the explanation of Anderson (1983) that a nation is a social construction and a group, limited in its political and social values, that exists in the consciousness of the members of this community. If nationalism played an important role in history in building a nation, patriotism, which develops gradually according to the cultural activity of the people, is concrete proof of the unity of the nation for its prosperity (Berger and Luckman 1966). Patriotic feelings and sentiments are reflected in a sense of belonging, connectedness and loyalty.

Patriotism is the most misused concept in education according to the authors (Levine & Youniss 2006: 8). Teachers very often confuse the concept of patriotism with the militaristic chauvinism used by some 20th century dictators to manipulate their own nation. What they fail to realise is that it is precisely the patriotic resistance against such authoritarian movements that has contributed to their downfall. Many authors openly question whether patriotism is an outdated concept that should not be passed on to younger generations. One of the most famous debates of this kind on the role and meaning of patriotism in the contemporary educational and cultural system is that between Callan and Galston (Archard 1999). Both authors stress the profound need for civic education in the modern education system to build young people's patriotic attachment to a single national identity. Both see the need for a strategy of citizen integration, a way of ensuring citizens' loyalty and allegiance to democratic political institutions within a liberal society. Both see civic education, imbued with elements of patriotism, as the means to achieve these goals. Both are concerned about the oft-stated concern for unbiased, objective thinking that almost always arises whenever any form of patriotic or patriotic education is attempted to be introduced, especially into the compulsory education system. It is a common dilemma, highlighting the tension between the demands to integrate elements of patriotism into the education system and the realisation that the concern for unbiased, objective thinking often has a corrosive effect on the circumstances in which such education is introduced. The belief that patriotism is a positive value and that it is good for a modern state to have citizens who love their country is often undermined by concerns for the well-being of impartial, objective thinking and the continued existence of the conditions for critical thinking. We should therefore distinguish the concept of patriotism from the concepts of nationalism, blind patriotism, xenophobia and other radical expressions that (too) often find a place in day-to-day discourse.

## Data and research methods

In an empirical study, the researchers analysed the meaning of patriotism and the patriotic consciousness of young people and, on this basis, tried to attribute a role and meaning to patriotism in the context of the education system in primary and secondary schools. Patriotism is an inevitable and important attribute of every person. It follows that home education is necessary for personal self-knowledge, which in turn is the necessary basis for a person to reflect on himself or herself and to enter into a critical dialogue with other persons. Self-knowledge is a prerequisite for a critical thinker, and without critical thinkers, the ideals of personal growth and democracy are unlikely to be realised. Patriotism is also a necessary component of a positive self-image. Democracy, personal growth and a positive self-image are values that rank highest on the moral scale and are closely interlinked. Patriotism, as the basis for their realisation, is therefore of great public or general-societal importance and should be fostered at school, especially in the context of civic education or a new special subject. The empirical research therefore sought to answer the following research questions: What is the (positive) function of patriotism? Is it reasonable and necessary to cultivate patriotism and teach it in schools (in which schools, as a part of which subjects)? How could education in patriotism take place? What are the basic dispositions and orientations of young people in the field of patriotic and civic awareness?

The survey was conducted in two parts, for primary school (PS) pupils and for secondary school (SS) pupils across Slovenia. The survey was conducted using the same questionnaire for each of the two target populations. In terms of timing, both surveys were conducted simultaneously, in December 2021 and January 2022, on a representative sample of 1,000 pupils in the final year of primary school and 1,000 pupils in the third year of secondary school, with primary and secondary schools from all statistical regions of Slovenia equally included in the representative random sample. The questionnaire was completed in the presence of the interviewers by 918 pupils in their final year of school (91.8% response rate) and 823 pupils in their final year of secondary school[2] (82.3% response rate). In analysing the empirical research, we will focus on two areas. The first one sought to answer the question to what extent young people are familiar with the process of national independence and the most important events related to the period of the formation of the Slovenian state. The second part of the workshop was devoted to the analysis of young people's civic literacy, i.e. the cognitive identification of young people's knowledge in the field of patriotism and active citizenship. The results of the survey can also be usefully

2 Based on the enrollment shares of the enrolled secondary school population, we appropriately included vocational and technical secondary schools and gymnasiums in the research. The share of the gymnasiums was 56.5% of the realised sample.

compared with the results of the survey conducted as part of the project »Active Citizenship and Homeland« (from here on ACH) in 2013.

## Empirical research

### *Slovenian independence*

The main focus of the empirical research was on knowledge of Slovenian independence. First, we asked the young people whether they had considered the topic of Slovenian independence as part of their history lessons and expected a high percentage of positive answers, as the topic is definitely part of the current curriculum in the subject. It was therefore quite a surprise that, although the majority of secondary school students (73%) and a much smaller proportion of primary school students (49.9%) answered 'yes', 22% of elementary school students answered 'no' and only 11.5% of secondary school students answered 'no' at the same time. Given that these are pupils in the last years of primary school, it is to be hoped that they will still be listening to this topic at the end of Year 9. The next logical question was how many school hours they thought were devoted to Slovenian independence in all subjects combined; 15.7% of primary school students and 15.2% of secondary school students thought that they spent between one and three school hours on independence in all subjects combined. The largest proportion of primary school students (52.9%) and secondary school students (49.5%) could not estimate how much time they spent on Slovenian independence in all subjects combined. Interestingly, 79.9% of primary school pupils and 74.3% of secondary school students felt that the time allocated for such a topic was quite sufficient.

Young people were further asked to rate their own knowledge about Slovenia's independence (Table 1). The highest proportion of students in the final year of primary school (43%) and of pupils in the final year of secondary school (44.4%) rated their own knowledge as good. Interestingly, secondary school students are much more critical of their own knowledge (or lack thereof) about Slovenia's independence than primary school students, which is confirmed by the proportion of those who rated their own knowledge as 'very good' or 'excellent', which is 38.5% for primary school students and only 25.7% for secondary school students. If this finding is combined with the previous question about the number of hours spent on the topic of Slovenia's independence in all subjects combined, it can be concluded that secondary school students in particular would like to learn more about this topic.

We were also interested in the sources from which young people learn the most about Slovenia's independence. Primary school students in Year 9 learn the most at school in history lessons, and a proportionally large amount from their parents, the internet and TV programmes, while the least from friends and

**Table 1: Self-assessment of knowledge about Slovenia's independence (in percent)**

| | Insufficient (1) | Sufficient (2) | Good (3) | Very good (4) | Excellent (5) |
|---|---|---|---|---|---|
| **Primary School Students** | 4.3 | 14.2 | 43.0 | 27.9 | 10.6 |
| **Secondary School Students** | 5.3 | 25.6 | 44.4 | 18.7 | 6.0 |

* Respondents answered the question 'Can you assess your knowledge about Slovenia's independence?' Source: Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022, N(PS)=918, N(SS)=823).

acquaintances, newspapers and magazines, and radio programmes. The answer to the question on the extent to which primary school pupils are interested in events related to Slovenia's independence shows that, unfortunately, it is below average and that the largest proportion (70.2%) of primary school pupils have little or no interest in such topics. Comparing the data with the 2013 ACH survey, we can see that the percentage of primary school students with little or no interest in the topic of independence has increased by 10.3% over the last decade.

The situation is similar for secondary school students in their final year; here too (Table 2), students learn the most about the independence process at school in history lessons and from other sources, and the least from friends and peers, newspapers and magazines, and radio broadcasts. Secondary school students in their final year are also below average in their interest in events related to Slovenia's independence. The majority of secondary school students (68.6%) have little or no interest in the topic of independence, while only 31.4% of secondary school students have at least some interest in the topic. Here again, the proportion of secondary school students with little or no interest in the topic of independence has increased by 4.7% over the past nine years.

If we compare the data obtained between the two generations of young people, we can see that both generations of young people learn the least about Slovenia's independence from radio broadcasts, rather little from newspapers and magazines, as well as from friends and peers, which is further evidence that young people do not talk much about this topic among themselves. The main sources of information on independence for primary school students and secondary school students are school and history lessons; this influence has decreased for primary school students and slightly increased for secondary school students since 2013.

Primary school pupils and secondary school students discuss topics related to Slovenia's independence quite rarely at home, but also with friends and peers, and most often at school. Interestingly, 43.1% of primary school pupils say that even at school they never or rarely discuss topics related to Slovenia's independence; among secondary school students, the figure is a high 55%. It is interesting

**Table 2: Comparison of sources of knowledge on Slovenian independence among youth**

| ... how much did you learn about Slovenia's independence from the sources listed? | Primary School Students 2013 | Primary School Students 2022 | Secondary School Students 2013 | Secondary School Students 2022 |
|---|---|---|---|---|
| From parents | 3.05 | 2.99 | 3.35 | 3.01 |
| From relatives and acquaintances | 2.57 | 2.40 | 2.78 | 2.50 |
| From friends and peers | 2.11 | 2.14 | 2.26 | 1.99 |
| In school history lessons | 3.85 | 3.53 | 2.93 | 3.78 |
| From TV programmes | 3.05 | 2.71 | 3.22 | 3.02 |
| From radio broadcasts | 1.87 | 1.84 | 2.08 | 1.91 |
| From newspapers and magazines | 2.09 | 1.73 | 2.46 | 1.93 |
| On the Internet | 2.87 | 2.87 | 2.95 | 2.99 |

* Respondents answered the question 'Please rate how much you have learned about Slovenia's independence from the following sources?', with value 1 being 'None.', value 2 being 'A little.', value 3 being 'Medium.', value 4 being 'Quite a lot.', and value 5 is 'A lot.'. The higher the value, the more the respondents learned about Slovenia's independence from that source.
Sources: Research 'Active Citizenship and Homeland' (Faculty of Social Sciences 2013, N(PS)=888, N (SS)=844); Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022, N(PS)=918, N (SS)=823).

to note that young people seem to want to talk about these issues, especially at school, as 69% of primary school students and 66% of secondary school students consider that knowledge of the events related to Slovenia's independence is 'still' or 'very' important for young people in our country. Compared to the 2013 ACH survey, the share of primary school students who consider knowledge of events related to Slovenia's independence important for young people in their country has decreased by 2%, while the share of students has increased by 1.2%.

We further asked young people to evaluate the association of some concepts with the period of Slovenia's independence; we wanted to see which concepts young people particularly associate with the period in which our country gained its independence. The results in Table 3 show that the majority of young people associate the concepts of 'patriotism', 'national consciousness', 'freedom', 'equality', as well as 'Slovenia's position in the world' and 'courage' with the independence period. The terms 'injustice', 'national purity of Slovenia', 'war suffering' and 'exploitation' are the ones that the youngest associate with the period of independence. It can also be noted that this time the responses in the two surveys compared (2013 and 2022) are very similar to each other and that the differences are minimal.

**Table 3: Linking some concepts to the period of Slovenian independence**

| To what extent is each concept related to the period of Slovenia's independence? | Primary School Students 2013 | Primary School Students 2022 | Secondary School Students 2013 | Secondary School Students 2022 |
|---|---|---|---|---|
| | (888) | (918) | (844) | (823) |
| Courage | 3.28 | 3.36 | 3.35 | 3.57 |
| Patriotism | 3.53 | 3.51 | 3.60 | 3.72 |
| National consciousness | 3.36 | 3.25 | 3.57 | 3.60 |
| Slovenia's national purity | 2.77 | 2.75 | 2.83 | 2.90 |
| Abolishing socialism | 2.97 | 2.84 | 3.00 | 3.04 |
| Democracy for every citizen | 3.32 | 3.27 | 3.40 | 3.46 |
| Freedom | 3.63 | 3.65 | 3.60 | 3.73 |
| Equal rights | 3.59 | 3.57 | 3.58 | 3.62 |
| Slovenia's position in the world | 3.37 | 3.36 | 3.32 | 3.45 |
| Injustice | 2.46 | 2.63 | 2.68 | 2.87 |
| The suffering of war | 2.60 | 2.73 | 2.78 | 2.84 |
| Exploitation | 2.57 | 2.65 | 2.84 | 2.92 |
| Economic development | 3.25 | 3.15 | 3.27 | 3.35 |

* Respondents rated each concept on a scale of 1 to 4, with 1 being 'Not at all related', 2 being 'Somewhat related', 3 being 'Rather related' and 4 being 'Very related'. The values in the columns are the average values of the responses; the higher the value, the more respondents associate the concept with the period of Slovenia's independence.
Sources: Research 'Active Citizenship and Homeland' (Faculty of Social Sciences 2013); Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022).

## *Civic literacy*

A special section of the questionnaire was devoted to examining knowledge of national symbols (the flag, coat of arms and anthem of the Republic of Slovenia), independence and key events related to it, knowledge of national holidays (with special attention paid to those with a more patriotic connotation), and knowledge of the elements of civic literacy (this was tested with a series of questions on the right to vote, the Slovenian constitution and political system, fundamental human rights and freedoms, etc.); it was therefore designed to cognitively identify the knowledge of primary and secondary school pupils in the field of patriotism and active citizenship.

In the question asking respondents to identify the flag of the Republic of Slovenia among three pictures of flags, the vast majority of answers were correct in the 2013 ACH survey and also in the most recent 2022 survey; 97.3% of

**Table 4: Identifying the national flag (percentage of correct answers)**

| Which of the flags below is the flag of the Republic of Slovenia? | Primary School Students 2013 | Primary School Students 2022 | Secondary School Students 2013 | Secondary School Students 2022 |
|---|---|---|---|---|
| Flag of the Republic of *Slovenia* - incorrect | 1.4 | 2.0 | 2.4 | 1.9 |
| **Flag of the Republic of *Slovenia* - correct** | **97.8** | **97.3** | **96.8** | **97.3** |
| Flag of the Republic of *Slovenia* - incorrect | 0.8 | 0.7 | 1.1 | 0.5 |

* Respondents answered the question 'Which of the flags below is the flag of the Republic of Slovenia...'
Sources: Research 'Active Citizenship and Homeland' (Faculty of Social Sciences 2013, N(PS)=888, N(SS)=844); Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022, N(PS)=918, N(SS)=823).

primary school pupils and the same percentage of secondary school students correctly identified the flag of the Republic of Slovenia. Based on these results, we conclude that the knowledge of the flag of the Republic of Slovenia among both groups of young people is extremely good.

**Table 5: Knowledge of official state symbols (in percentages)**

| What are the official state symbols of the Republic of Slovenia? | Primary School Students 2013 | Primary School Students 2022 | Secondary School Students 2013 | Secondary School Students 2022 |
|---|---|---|---|---|
| Flag, coat of arms, passport | 2.0 | 0.3 | 1.7 | 0.6 |
| **Flag, coat of arms, anthem** | **93.4** | **97.1** | **92.3** | **95.6** |
| Anthem, constitution, coat of arms | 3.7 | 1.9 | 5.2 | 2.9 |
| Coat of arms, identity card, passport | 0.9 | 0.7 | 0.8 | 0.9 |

Sources: Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022, N(PS)=918, N(SS)=823); Research 'Active Citizenship and Homeland' (Faculty of Social Sciences 2013, N(PS)=888, N(SS)=844).

The second question, related to civic literacy, asked young people to identify the official symbols of the Republic of Slovenia. The proportion of correct answers is also high and even slightly higher than in surveys conducted in previous years; similarly to the identification of flags, the proportion of correct answers is slightly higher among primary school students, with 97.1% of primary school students and 95.6% of secondary school students identifying the official state symbols of the Republic of Slovenia.

**Table 6: Young people's knowledge of holidays (percentage of correct answers)**

| | Primary School Students 2013 | Primary School Students 2022 | Secondary School Students 2013 | Secondary School Students 2022 |
|---|---|---|---|---|
| Slovenian cultural holiday | 85.5 | 77.0 | 88.9 | 91.9 |
| Statehood Day | 59.9 | 61.4 | 58.2 | 76.9 |
| The return of Primorska to its homeland | 54.0 | 64.3 | 52.2 | 75.1 |
| Reformation Day | 63.9 | 65.9 | 72.7 | 82.6 |
| Rudolf Maister Day | 54.5 | 66.3 | 51.2 | 76.0 |
| Christmas | 90.8 | 94.7 | 92.3 | 95.9 |
| Independence and Unity Day | 51.0 | 56.3 | 48.0 | 71.3 |

* Respondents were asked to associate the seven dates given with the names of seven different national holidays. Avoidance and non-response on specific dates have been taken into account as incorrect responses ('valid percentages' are available in the attached summaries).
Sources: Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022, N(PS)=918, N(SS)=823); Research 'Active Citizenship and Homeland' (Faculty of Social Sciences 2013, N(PS)=888, N(SS)=844).

The civic literacy question asked primary school and secondary school to relate the names of the holidays to the dates of the celebrations of those holidays. We asked both groups of respondents the same question, expecting – based on surveys carried out in previous years – a slightly lower response from primary school pupils. We wanted to find out to what extent young people were familiar with two typical patriotic holidays (we chose Statehood Day, 25 June, and Independence and Unity Day, 26 December), to which we added three well-known holidays (Christmas, Reformation Day and the Slovenian Cultural Day), which are mostly not associated with patriotic themes by the general public *a priori*, although the latter certainly has a strong patriotic connotation, and added two less well-known and more recent holidays (which are also *not* public holidays), i.e. Rudolf Maister Day and the return of Primorska to its homeland, which certainly have some patriotic connotations.

We find that knowledge/recognition of the holidays improves significantly with age; secondary school students are more familiar with the holidays than primary school students. 38.6% of primary school students (and 23.1% of secondary school students) do not know the date on which the Slovenian state celebrates its birthday, and 43.7% of primary school students (and 28.7% of secondary school students) do not know the date of Independence and Unity Day or confuse it with the Statehood Day. Even less impressive is the knowledge of the slightly more recent and less simple holidays, i.e. Rudolf Maister Day and the day of return of Primorska to its homeland. Both groups of young people have the least difficulty

in identifying two well-known holidays (Christmas, Slovenian Cultural Holiday). There are no statistically significant differences between primary school pupils and secondary school student in terms of the environment in which they attend school; female pupils are slightly more familiar with the holidays, although the gender difference is not significant. The expected correlation was also found for students, who also show an extremely strong correlation between knowledge of holidays and type of secondary school, with secondary school students attending gymnasiums having a significantly higher knowledge of holidays.

Based on these responses, we conclude that the knowledge of national holidays related to the period of independence and the gaining of independence of the Republic of Slovenia is rather poor, especially among primary school students, but has slightly improved since 2013 among secondary school students, especially among gymnasium pupils; we have observed that young people often confuse the Statehood Day and the Independence and Unity Day; the lack of knowledge of these two key holidays among primary school pupils is in fact on a par with the lack of knowledge of Rudolf Maister Day and the Day of the return of Primorska to its homeland.

**Table 7: Young people's knowledge of the Slovenian Constitution, political system, human rights, democracy and similar areas in the most general terms (percentage of correct answers)**

| Claims | | Primary School Students | Secondary School Students |
|---|---|---|---|
| (N = ) | | (918) | (823) |
| 1 | The Slovenian Constitution was adopted after Slovenia's independence. | 79.6 | 77.3 |
| 2 | The Slovenian Constitution speaks, among other things, about human rights. | 81.2 | 88.9 |
| 3 | The Slovenian Parliament is made up of the National Assembly, which has 90 members, and the National Council, which has 40 councilors. | 67.4 | 71.0 |
| 4 | The Government of Slovenia passes laws. | 33.1 | 37.3 |
| 5 | The Slovenian Parliament elects the Prime Minister and ministers. | 51.4 | 49.0 |
| 6 | Our fundamental human rights are already guaranteed by international treaties and conventions. | 58.8 | 61.0 |
| 7 | Any citizen aged 18 or over can vote. | 88.8 | 92.7 |
| 8 | The President of the Republic of Slovenia is elected in elections. | 88.7 | 93.3 |
| 9 | In the Republic of Slovenia, church and state are separate. | 56.1 | 81.7 |
| 10 | Slovenia is a member of the European Union and NATO. | 86.6 | 90.2 |
| 11 | Slovenia was an independent country after World War I, between 1918 and 1941. | 83.1 | 90.7 |

Source: Research 'Strengthening Patriotic and Civic Consciousness among Young People' (Faculty of Social Sciences 2022).

In the set of questions related to the analysis of civic literacy (Table 7), we tested Slovenian primary and secondary school students' knowledge of the Slovenian Constitution and political system, human rights and fundamental freedoms, democracy and other areas of civic education. Both groups of respondents were asked the same questions, and for each statement they were asked to identify whether the statement was true or false. Analysis of the responses shows three qualitative strands of knowledge. The highest level of knowledge (on average over 80 percent of correct answers) was shown by both groups for the statements 'Any citizen who has reached the age of 18 can participate in elections', 'The President of the Republic of Slovenia is elected at the ballot box', 'The Slovenian Constitution was adopted after Slovenia's independence', 'The Slovenian Constitution speaks, among other things, of human rights', 'Slovenia was an independent state after the First World War, between 1918 and 1941', 'Slovenia is a member of the European Union and NATO'. It can be concluded that primary and secondary school pupils showed a fairly high level of knowledge of the foundations of civic literacy. The statement 'In the Republic of Slovenia, church and state are separate' is also the only statement where there is a significant difference in the knowledge of primary and secondary school pupils.

Both groups showed a medium level of knowledge (on average between 60% and 80% of correct answers) for the statement 'The Slovenian Parliament consists of the National Assembly, which is composed of 90 members, and the National Council, which has 40 councilors' and 'Fundamental human rights are already guaranteed by international treaties and various conventions'.

However, both groups showed a relatively low level of knowledge (below 60% of correct answers) for the statement 'The Slovenian Parliament elects the Prime Minister and ministers', and especially for the (admittedly incorrect) statement 'The Government of Slovenia passes laws'. This statement is not recognised as incorrect by about seven tenths of Slovenian primary school pupils and Slovenian secondary school pupils. The results of the short civic literacy test show that it would be useful to pay a little more attention in both primary and secondary schools to the basics of the functioning of the Slovenian state and the relationship between the executive and the legislative branches of government, which is also crucial for a well-functioning parliamentary democracy.

In addition, we asked respondents a few more questions. We asked them when the first multi-party elections were held in Slovenia. Only 10.5% of primary school students (5.9% less than in the 2013 survey) and 26.4% of secondary school students (19% more than in the 2013 survey) answered this question correctly (April 1990). We further asked young people which political group founded the government that brought about independence. The correct answer (Demos) was selected by 22.2% of primary school students (17% less than in the 2013 survey) and 47.2% of secondary school students (22% more than in the 2013 survey). Interestingly, the proportions of primary school students who

think that Slovenian independence was brought about by Demos (22.2%) and the Socialist Union of Slovenia (21.2%) are almost identical.

We also asked what Slovenians decided in the plebiscite in December 1990. Among the five options,[3] the correct answer (on Slovenia's independence and sovereignty) was selected by 72.1% of primary school students and 81.4% of secondary school students, which is slightly more encouraging than in the previous two questions, and slightly better than in the 2013 ACH survey.

The next question asked about the person who headed the Executive Council (government) of the Republic of Slovenia during the independence period (Lojze Peterle). Only 10.2% of primary school students identified the real prime minister of the Republic of Slovenia among the nine names offered (in 2013: 29.9% of primary school students) and 31.4 percent of secondary school students (in 2013: 19.2% of secondary school students).

We also asked for the exact date on which Slovenia declared its independence (25 June 1991 – Statehood Day). 78.6% of primary school students correctly circled this date among the three options (in 2013: 77.2% of primary school students) and 88.1% of secondary school students (in 2013: 80.4% of secondary school students).

The last question on civic literacy asked young people 'how has Slovenia achieved full international recognition'. Here again, the highest proportion of primary school students (40.5%) chose the 'don't know' option, while 27.5% of primary school students and 37.4% of secondary school students found the correct answer (with the recognition of the European Union countries), which is higher in both groups than in the 2013 ACH survey.

## Conclusion

Patriotism has been an emotion among us throughout human history. Of course, the content of emotions, their scope and perhaps even the understanding of homeland change, but patriotism is undoubtedly tied to a social community, or its members, and the area that this very community inhabits and thus indirectly understands as home. It has been fought for, died for, protected, worshipped and certainly loved by individual communities. Like most emotions, patriotism can be linked to material existence and therefore knowledge of it is essential. This is even more important in the case of a home or homeland, which does not change and most often follows many generations. On this basis, patriotism can also be linked to knowledge of the history of one's home or homeland. What is being done and how it is being done in Slovenia is at least partly illustrated by the results of a large-scale survey we conducted among Slovenian primary school

3 The options offered were 'to adopt a new constitution', 'to introduce democracy', 'to establish a confederation with Croatia', 'on Slovenia's independence and sovereignty', 'on EU membership' and, of course, 'I don't know'.

pupils and secondary school students after several years of pause. Although the primary focus of this article is on the period of the creation of the Slovenian state, and many other important themes from Slovenian history might need to be defined for the purposes of a comprehensive concept of patriotism, this topic is particularly important. After all, the gaining of independence was the goal towards which the views of the greatest patriots were indirectly, and in many cases directly, directed.

For students, patriotism is a rather abstract concept; as we have seen from the results of the empirical research, young people's interest in topics related to the founding of the Slovenian state and independence is relatively low,[4] but there is still some interest. Even more worrying is the relatively low level of knowledge displayed by young people when it comes to the processes of independence and the formation of the Slovenian state, as well as when it comes to the functioning of our country and the Slovenian political system – when it comes to so-called civic literacy. The consequences of low levels of patriotism among the youth can lead to increased levels of distrust towards key political institutions, may result in reduced civic engagement, decreased willingness to contribute to the community and challenges in fostering a cohesive society. However, it's essential to note that not all expressions of patriotism are positive, and a critical and informed citizenry can contribute positively to a nation's development.

For many years, researchers have been pointing out that radical changes are needed, but that these changes should truly address the problem in depth (Haček 2019: 438; see also Kukovič et al. 2022); sadly, political decision makers have neglected this educational policy area almost from the independence, and results of this neglect are not surprising. In order to make some improvement, it will be first necessary to come to a common understanding of what patriotism means to us, while consciously avoiding petty politicking, when political forces in society are so eager to abuse patriotic sentiments for their own daily needs. What content will bring young people closer to their homeland? Or maybe these contents are not important at all for modern young people? A wide-ranging professional debate could undoubtedly provide a framework that could then be

4 Of the 18 areas offered, primary school pupils are by far the least interested in the area of 'politics and political participation' (84.8% have little or no interest in this area), with an average response of 1.72 on a scale of 1 'I have no interest' to 4 'I am very interested'. The 'national past and the fate of the nation' and the 'formation of an independent Slovenian state' scored an average of 2.13 and 2.20 respectively. Very similar results are found for final year secondary school students, where 'politics and political participation' also ranks last (77.7% have little or no interest in this area), with an average value of 1. 91. The 'national past and the fate of the nation' and the 'formation of the independent Slovenian state' scored slightly higher than the average scores of primary school pupils, 2.27 and 2.28 respectively. Compared to the 2013 ACH survey, interest in all three of these areas has fallen further among both primary and secondary school pupils. On the other hand, both groups of respondents are most interested in 'friendship' and in 'a job or profession' (the mean values for primary school pupils are 3.56 and 3.47, respectively; for secondary school students the mean values are 3.57 and 3.55, respectively). See Kukovič et al. (2022).

translated into attractive teaching content for existing or new subjects, with the help of didactic theorists and, ultimately, practitioners – teachers. And of course, this content will need to be continuously updated – because the achievements of our homeland have been and will continue to be repeated in the years to come.

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# The role of institutional and political factors in attracting Chinese and Russian multinationals to the Visegrad countries

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**Abstract:** *International business research is usually focused on various aspects of foreign direct investment (FDI) by non-European emerging-market multinational enterprises (EMNEs) without attention to non-traditional factors pulling them into host countries. The objective of this paper is to examine the investments of EMNEs from two source countries, China and Russia, within the Visegrad Four (V4) economies. Based on interviews and a qualitative document analysis, it explores the main characteristics of their investments into the V4, including host-country determinants by focusing on macroeconomic, institutional and political factors. The paper finds that these factors do influence EMNEs' investment practices, and that they correlate with the changing quality of political relations, but this influence needs to be assessed on a case-by-case basis.*

**Keywords:** ***emerging-market multinationals, China, Russia, Visegrad Four, outward foreign direct investment, institutional and political pull factors***

## Introduction

In the 1990s, the transition of the Visegrad Four (V4) countries – Czechia, Hungary, Poland and Slovakia – from centrally planned to market economies resulted in increasing inflows of foreign direct investment (FDI) into the region (Sass & Szalavetz 2013; Szanyi 2020). During this period, the V4 went through a radical economic restructuring, largely induced by foreign capital. Multinational enterprises (MNEs) realised significant investment projects and established their own production networks. Investors, mainly from core Euro-

pean countries, were attracted by macroeconomic factors, including relatively low unit labour costs, market size, openness to trade and proximity (Szalavetz 2020). Institutional factors, such as the prospects for the V4 countries' economic integration with the EU, also increased FDI inflows into the region (Szanyi 2020). Besides this interest from Western Europe and the US, the past two decades have seen a clear increase in non-European emerging-market multinational enterprises' (EMNEs) investment in the V4 region (Szunomár 2020). Chinese investors started appearing after the new millennium, while Russian (Soviet) investors have long been present in the V4 region, yet their investment activity remained limited until the collapse of the communist regimes and the dissolution of the Soviet Union.

EMNEs offer an alternative source of investment to Western capital for the V4 countries. This may seem a win-win situation yet it is not: the V4 countries' individual receptiveness is not necessarily the same when it comes to Chinese or Russian investors. Although the V4 countries follow similar economic development paths, and their economic institutions and interests are likewise comparable, they seem to have different attitudes to FDI from authoritarian, non-democratic countries. This is likely one explanation for the uneven distribution of EMNEs' investment in the region.

The paper aims to identify the host-country determinants of Chinese and Russian FDI within the V4, with a focus on macroeconomic, institutional and political pull factors. Our hypothesis is that while macroeconomic factors remain important, specific institutional and political pull determinants are often even more decisive for Chinese and Russian investments in the V4. The contribution of this paper is that notwithstanding macroeconomic and institutional factors, political factors – i.e. the quality of political relations, political considerations of governments, alliance-building, etc. – play an important role in attracting (or deterring) emerging companies' investments to a certain country.

Empirically, we investigate the V4 region as a whole, but we pay special attention to the Hungarian case. This choice has to do with the transformation of Hungary into an interventionist 'accumulative state' (Scheiring 2020) or 'neo-patrimonial state' (Szelenyi & Csillag 2015). These concepts portray Hungary as a semi-developmental state that captures and redistributes assets through the elimination of checks and balances and the creation of patronage networks. In other words, Hungary behaves in some ways like China or Russia that may make the Hungarian market more attractive for Chinese and Russian MNEs. Consequently, the rationale behind Chinese and Russian investors choosing Hungary (rather than the rest of the V4) as a host or hub for several investment projects may not be purely economic or geographical but also political.

Our research covers the period before the 2022 Russian invasion of Ukraine. It, therefore, does not address the impacts of the war and subsequent sanctions policies as well as the emerging economic and energy crisis on Russian FDI flows

in the V4 region. Macroeconomic, institutional and political pull factors are now shifting, and the new situation carries negative consequences for the Russian FDI.

The paper is structured as follows. Section 2 reviews those theoretical attempts that seek to identify the special features of EMNEs' behaviour. Section 3 briefly sketches the context and methods on which this paper is based. Section 4 examines the changing patterns of Chinese and Russian outward FDI (OFDI) in the V4 by showing the major trends, patterns and available data. Subsequently, Section 5 presents the host-country determinants of Russian and Chinese MNEs. Finally, the concluding section returns to the theoretical starting points outlined above and draws out the study's general implications.

## Theorising the special features of emerging MNEs' behaviour in the V4

This paper is theoretically situated at the crossroads of studies on FDI and illiberal political regimes. It develops the linkages between these two literatures and argues that changes in domestic institutional settings, particularly the illiberal weakening of checks and balances, correlates with changes in FDI interest coming from third-country investors such as Russia and China. Much literature has investigated the role of location advantages, i.e. those pull factors that attract investment to certain countries. Other authors have written extensively about how variations in domestic political institutions correlate with FDI interest. The first part of the following discussion focuses on the traditional determinants of FDI inflows, while the second part considers the implications state capitalism may have for FDI.

### *Traditional determinants of FDI inflows*

Pull motivations of EMNEs are often different from those of developed countries. For example, Hanemann (2013) identifies commercial reasons underlying most Chinese investments: the acquisition of rich-world brands and technology to increase competitiveness. Other industry-driven motives include the circumvention of transportation costs, trade barriers or intangible asset-seeking (Dunning & Lundan 2008; Ramamurti & Singh 2009). There are also firm-specific characteristics, such as the access and usage of state-of-the-art technology (Ramamurti 2012).

While some EMNEs focus on neighbouring regions, others target the global market, including developed countries. Within Europe, EMNEs seek to (1) present themselves as a European Union company, (2) make use of special features of these countries to expand their businesses within them as well as to other countries, and (3) take advantage of the favourable tax treatment policies available to foreign investors (Gubbi & Sular 2015). The direction and

intensity of MNEs' FDI flows are determined by various factors, including size, performance or industry at the firm level (Terpstra & Yu 1988; Nachum & Zaheer 2005). For EMNEs, however, country-level characteristics may be more decisive (Schüler-Zhou et al. 2012), particularly in countries with autocratic regimes. As highlighted by Dunning (1998), at the country level, both home- and host-country characteristics determine the location decisions of MNEs. In this paper, we concentrate on exploring the host country-level driving forces.

Host-country determinants or pull factors are characteristics attracting FDI towards the host countries. These can be grouped into macroeconomic and institutional factors. Macroeconomic pull factors include access to markets, low factor costs and new opportunities for asset-seeking companies (such as acquiring brands, knowledge and distribution channels) and company-level relations. Institutional factors include international and regional investment and trade agreements, host-government policies, institutions such as government-related investment promotion agencies (IPAs), institutional stability (intellectual property rights protection, product safety standards), privatisation opportunities, the possibility of participating in public procurement processes and the role of local home-country diaspora (Makino et al. 2002; Buckley et al. 2007; Schüler-Zhou et al. 2012). We can further specify institutional factors by dividing them into two levels: the supranational and the national (McCaleb & Szunomár 2017).

With regard to the determinants of FDI inflows to the V4 countries, studies often mention the impact of institutional characteristics, such as forms of privatisation, capital market development, the rule of law and country risk. Although Bevan and Estrin (2004: 777) claim that institutional aspects were not a significant factor in investment decisions of foreign firms, Carstensen and Toubal (2004) argue that these aspects could explain uneven distribution of FDI across the V4 countries. Fabry and Zeghni (2010) posit that FDI agglomeration in transition countries may be due to institutional weaknesses like poor infrastructure, the lack of developed subcontractor networks, and unfavourable business environment, and less because of positive externalities resulting from spillovers, clusters and networks. Based on a study of 19 Latin American and 25 East European countries in the period 1989–2004, Campos and Kinoshita (2008) concluded that structural reforms, especially financial reforms and privatisation, had a strong positive impact on FDI inflows. Furthermore, Kawai (2006) found that by 2004 Japanese MNEs' investment in the V4 was motivated by relatively low labour and land costs, well-educated labour force necessary in manufacturing sectors, and access to rich EU markets.

### *Implications of state capitalism for FDI*

There is a growing need to expand international business theory to take greater account of the political factors that operate through a country's institutions

(Child & Rodrigues 2005). Since the mid-2000s, there has been a sharp rise in state intervention in the economy and a general strengthening of states around the world (Bremmer 2008; Kurlantzick 2016). Scholars have turned their attention to the growing role of the state by applying the comparative capitalism and Varieties of Capitalism (VoC) frameworks to emerging markets as well as countries in Central and Eastern Europe (Bohle & Greskovits 2007, 2012; Sauvant 2008; Witt & Redding 2013; Nölke 2014; Nölke et al. 2019; Alami & Dixon 2020). Despite these efforts, little is known about how the various types of state capitalism and their different growth models influence the internationalisation of firms and the flow of FDI across borders. According to the VoC literature, the V4 countries represent a special variety of capitalism, the so-called dependent market economy (DME) type (Nölke & Vliegenthart 2009). This means that these countries have comparative advantages in the assembly and production of relatively complex and durable consumer goods, based on institutional complementarities between skilled yet cheap labour, the transfer of technological innovations within transnational enterprises, and the provision of capital via FDI (ibid.: 672).

Since the popularity of these countries increased in the 1990s' transition to democratic regimes, researchers suspected a link between the ability to attract capital and the quality of democracy. In Jensen's (2003) analysis, there is a strong causal relationship between democracy and FDI inflows, suggesting that democracies are better able to attract FDI than their authoritarian counterparts. Along with Jensen (2003), Harms and Ursprung (2002: 653) find that 'political and civil repression' is negatively correlated with FDI, foreign investors are thus responsive to the state and quality of governance in the host country, and are deterred if repression is more severe. Alesina and Dollar (2000) challenge this logic and argue that capital flows are influenced by property rights and the stability and reliability of the investment environment, rather than democracy itself. Hankla and Kuthy (2013) find a similarly positive relationship between autocracies and open trade policies, stating that economic openness (be it trade or FDI) can be key for the survival of a non-democratic regime. Indeed, autocratic regimes responded positively to the waves of capital liberalisation in the 1980s and 1990s, embracing the trend towards more openness considering their need for economic growth (Pond 2018). This indicates that these countries are likely to be just as bound by international agreements on protection of investment and intellectual property as their more democratic counterparts.

Illiberalism may also be a determinant of FDI attractiveness, but the relationship is not necessarily negative. Csaba (2021) discusses four distinct models of illiberal economic practices: the East Asian tigers, Russia, China and Hungary. Though this typology is specific to particular countries and regions, he claims that state involvement in the economy has been the rule rather than the exception in economic history broadly conceived. When it comes to Hungary, Csaba emphasises the model's defining feature in terms of 'governmental decisions on

investments, regulations and details of conduct of economic activities' (ibid.: 684). The model is thus about a particular logic of making decisions – secret ones, often hastily, and considering the potentially non-economic interests of the government – that is definitive about Hungarian illiberalism in the economic sphere.

Exceptionally within the V4, the quality of liberal democracy in Hungary started declining in the 2010s, and the tendency seems to continue to this very day (Innes 2015; Buzogány 2017; Wilkin 2018). Interestingly, this has not negatively affected or undermined Hungary's integration into global production chains. Instead, there is a 'dual treatment' of foreign firms by the central dispensation of advantages and favours (Szanyi 2019: 122): some multinational companies have been forced out of the country or seen their businesses suffer, yet many others are encouraged to stay and to expand their activities. Chinese and Russian investors typically fall into the latter category.

Finally, there is an emerging rhetoric of threat in the West targeting EMNE investments originating from countries such as China and Russia. These investments are often deemed harmful in terms of acquisition intent (Das 2021), opportunistic because they target financially exposed companies during a crisis (Neely & Carmichael 2021), shady as their ownership chains are hidden and difficult to disentangle, or predatory in terms of conducting industrial espionage or realising illegal technology transfers (Hannas et al. 2013). Besides the investor's identity and the nature of the investment, recent shocks such as the COVID-19 pandemic and Russia's war in Ukraine have fuelled a concern with EMNEs and the possible political control their home governments may exercise over them. These developments further demonstrate the relevance and timeliness of our research, and though we pay attention to political factors driving EMNEs' interest, the paper is not focused on empirically investigating these allegations in the cases of Chinese and Russian FDI in the V4 countries. We likewise acknowledge that state and corporate actors are often intertwined, including in our source countries of China and Russia, and that this intertwinement exerts an important influence on FDI dynamics. However, we did not conduct our research with such a focus in mind, and thus we simply flag it as a possible research direction for future studies to take up.

## Methodology

Since FDI inflows from ENMEs into European peripheries is a relatively novel phenomenon, the literature addressing it is limited and based mostly on secondary sources. Our methodological approach comprises a mix of qualitative interpretative methods, such as ethnographic fieldwork, (elite) interviewing and qualitative document analysis, as well as secondary analysis of relevant statistics. Data were collected over five years between 2017 and 2021. Fieldwork

and interviews were conducted with representatives of various EMNEs' affiliates in the V4: the authors conducted personal interviews at four companies. Where official interviews were not applicable, the authors spoke to former employees, business professionals, experts and academics from the V4. The interviews were conducted anonymously, and all interviewees were guaranteed confidentiality. The interviews were semi-structured and analysed based on extensive notetaking during and after the interviews.

Relying on interviews has both pros and cons. One advantage is that detailed information is available of an analysed area and of its development over time. At the same time, a drawback of this methodology is the relatively small number of companies willing to be interviewed for this study. Since our sample is limited, the generalisability of our findings is questionable. To complement our argument, we relied on qualitative document analysis of governmental (policy) reports, news pieces, corporate publications (e.g. annual reports) and corporate databases (such as Bureau van Dijk's Orbis). This is meant to ensure a broader understanding of target companies' corporate identity, internationalisation strategy and the host countries' institutional and societal contexts.

These nuanced data are complemented by further input from secondary analysis of aggregate official FDI statistics. In assessing these data, we take into account that the geographical composition of Chinese and Russian OFDI is distorted due to Chinese and Russian companies' preference to invest through third countries, largely de jure or de facto tax havens and offshore centres (Panibratov 2017: 43; Clayton et al. 2023). These countries intermediate Chinese and Russian FDI either by trans-shipping it to the final foreign destination or round-tripping it back to the home country. Over time, this statistical distortion is becoming less of an issue thanks to statistical reporting not only on the immediate (first) partner country but also on the ultimate beneficiary. The national institutions responsible for collecting official OFDI data in China and Russia – China's Ministry of Commerce (MOFCOM) and the Central Bank of Russia (CBR) – do not report these statistics on an ultimate basis.[1] We obtain such data from the OECD, which gathers data from the V4 national central banks. Data according to the ultimate investor are available for Czechia, Hungary and Poland, but not for Slovakia, which publishes data only based on the immediate partner country.[2] These data can be compared with the MOFCOM and CBR statistics.[3]

1 The CBR publishes its OFDI data on the basis of both the asset/liability principle and the directional principle, the latter being the new standard, while the MOFCOM uses the directional principle.

2 Ultimate FDI data are given for the period 2013–2021, except for Hungary where data for 2013 and 2021 are missing (OECD 2023). The Hungarian central bank (MNB) provided us with data for 2021 via email (18 December 2023). In this paper, we present data with special purpose entities (SPEs) – resident firms of non-resident owners taking advantage of host-country regulations (Tables 1 and 3).

3 Even following the same principle of FDI presentation, the difference between home- and host-country statistics is obvious, as the methodologies for calculating inward FDI (IFDI) and OFDI are different, and the statistical offices also have varying success rates in collecting the necessary data.

Regarding the research design, we first collected information on Chinese and Russian MNEs' investments all over the V4 region. Then, we narrowed the focus to host-country determinants, with a special focus on Hungary to illustrate the role of political pull factors in more detail. We chose to zoom in on Hungary for two reasons. It is a major host of both Chinese and Russian FDI in the V4 by ultimate investor based on latest OECD statistics, and it has an interventionist and authoritarian regime in some way similar to that of Russia and China. The potential theoretical import of Hungary as a case is precisely to explain both the continued interest of particular FDI source countries like China and Russia, and Hungary's domestic institutional conditions that have changed for the worse in terms of stability and predictability since 2010. In the case of emerging-market multinationals, many of which matured and socialised in authoritarian contexts, democratic backsliding is the norm rather than the exception. Not only that, but the heavy-handed, interventionist practices they see in countries like Hungary are familiar and thus do not serve as deterrents against FDI. The focus on Hungary as an empirical case helps illustrate these theoretical connections more broadly.

## The characteristics of Chinese and Russian OFDI in the V4

### *Chinese OFDI*

Although China considers the broader CEE[4] as a bloc, some countries seem to be more popular investment destinations than others. Indeed, Chinese FDI is far from balanced across CEE countries: the V4 hosts more than 75% of the total Chinese OFDI to the CEE region. The majority of other CEE countries has not attracted significant amounts of Chinese FDI flows so far, despite slight increases in many cases.

Hungary, Czechia and Poland have received the bulk of Chinese investment since the early 2000s, with Slovakia lagging behind due to their small size and lack of efficient transport infrastructure. Within the CEE region, in per-capita terms, Hungary is the most important host country of Chinese FDI for stock and flow data. Chinese FDI stock in the V4 countries has steadily increased, particularly after their accession to the EU in 2004 and the economic and financial crisis of 2008.

MOFCOM statistics do not capture the real level of Chinese investment in Central and Eastern Europe. For example, according to MOFCOM data, total Chinese FDI in 17 CEE countries amounted to USD 2.84 billion in 2019 (MOF-

4 The post-communist CEE region consists of 17 economies: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Czechia, Estonia, Hungary, Croatia, Kosovo, Latvia, Lithuania, Montenegro, North Macedonia, Poland, Romania, Serbia, Slovakia and Slovenia. China and Russia do not recognise Kosovo as an independent state.

COM 2020), while OECD's ultimate investor statistics show that Hungary alone accounted for roughly the same amount of Chinese capital stock in that year. By 2021, the amount of Chinese investments in Hungary reached USD 4.0 billion according to data from the MNB (email information from the MNB, 18 December 2023) (Table 1).[5] Based on OECD statistics, Chinese FDI flows to the CEE region are relatively hectic (OECD 2023). This has to do with the handful of big business deals that are closed in a year. Divestments are less characteristic for most of the analysed countries. One exception is CEFC China Energy, which chose to divest from Czechia in 2018.

China's economic impact on the V4 countries remains relatively small. Chinese investments are dwarfed by German MNEs' investments into these countries. When calculating percentage shares, we find that Chinese FDI stocks are below 1% of total IFDI stocks in the V4 countries (Table 1). As a result, China's share of total FDI in the V4 is still far from significant: in the past years it has been around or below 0.5% for Czechia, Slovakia and Poland, and around or a bit above 1% for Hungary. By contrast, West European investors are responsible for more than 60–70% of total FDI stocks. Even among non-

**Table 1: Chinese FDI stock in the V4 in absolute terms and as a percentage of total IFDI stock, 2013–2021 (million USD and per cent)***

| | | 2013 | | 2014 | | 2015 | | 2016 | |
|---|---|---|---|---|---|---|---|---|---|
| | | I | U | I | U | I | U | I | U |
| Czechia | M USD | –9 | 136 | –13 | 204 | 268 | 371 | 665 | 794 |
| | % | – | 0.1 | – | 0.2 | 0.2 | 0.3 | 0.5 | 0.7 |
| Hungary | M USD | 93 | .. | 86 | 1 268 | 99 | 1 952 | 176 | 1 934 |
| | % | 0.0 | – | 0.0 | 0.6 | 0.0 | 1.0 | 0.1 | 0.8 |
| Poland | M USD | 110 | 641 | 179 | 502 | 218 | 928 | 177 | 707 |
| | % | 0.0 | 0.3 | 0.1 | 0.2 | 0.1 | 0.5 | 0.1 | 0.4 |
| Slovakia | M USD | 35 | .. | 38 | .. | 15 | .. | 27 | .. |
| | % | 0.1 | – | 0.1 | – | 0.0 | – | 0.1 | – |

| | | 2017 | | 2018 | | 2019 | | 2020 | | 2021 | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | I | U | I | U | I | U | I | U | I | U |
| Czechia | M USD | 691 | 1 101 | 687 | 1 012 | 705 | 1 501 | 204 | 770 | 127 | 760 |
| | % | 0.4 | 0.7 | 0.4 | 0.6 | 0.4 | 0.9 | 0.1 | 0.4 | 0.1 | 0.4 |
| Hungary | M USD | 212 | 1 989 | 60 | 2 636 | –54 | 2 790 | 240 | 3 484 | 978 | 3 983[a] |
| | % | 0.1 | 0.8 | 0.0 | 1.5 | – | 1.2 | 0.1 | 1.0 | 0.3 | 1.0 |
| Poland | M USD | 230 | 848 | 318 | 935 | 205 | 1 223 | 310 | 1 418 | 847 | 1 556 |
| | % | 0.1 | 0.4 | 0.1 | 0.4 | 0.1 | 0.5 | 0.1 | 0.6 | 0.3 | 0.6 |
| Slovakia | M USD | 36 | .. | 25 | .. | 41 | .. | 16 | .. | 60 | .. |
| | % | 0.1 | – | 0.0 | – | 0.1 | – | 0.0 | – | 0.1 | – |

* With SPEs. [a] Email information from the MNB (18 December 2023).
I = immediate; U = ultimate; .. = not available; – = not applicable
Source: OECD (2023)

5 As mentioned above, this 2021 data is missing in the OECD database.

-European investors, companies from the United States, Japan and South Korea are typically more important players than those from China.

As presented in Table 2, Chinese investors tend to target secondary and tertiary sectors of the V4 countries. Initially, Chinese investment flowed mostly into manufacturing (assembly), but over time, services have attracted more and more investment. For example, Hungary and Poland have branches of the Bank of China and the Industrial and Commercial Bank of China. In addition, some of the largest law firms, such as Yingke Law Firm (established in Hungary in 2010 and in Poland in 2012) and Dacheng Law Offices (established in Poland in 2011 and in Hungary in 2012), also have offices in these countries. The main Chinese investors targeting the V4 countries are primarily interested in telecommunication (such as Huawei and ZTE), electronics (such as Lenovo, Joyson and Hikvision), chemicals (such as Wanhua, BBCA and Syngenta), and automotive/transportation (such as BYD, Yanfeng and recently also CATL).

**Table 2: Characteristics of major Chinese investment in the V4**

| | Hungary | Poland | Czechia | Slovakia |
|---|---|---|---|---|
| *Entry mode* | Greenfield/ brownfield, M & A, joint ventures | Greenfield and M & A | Greenfield and M & A | Greenfield and M & A |
| *Main sectors* | Chemical, IT/ ICT, electronics, wholesale and retail, automotive, banking, hotels and catering, logistics, real estate | IT/ICT, electronics, heavy machinery, publishing and printing, real estate, municipal waste processing | Electronics, IT/ICT, transport equipment, automotive, shipping, engineering, food, media, plate-making | automotive industry, IT/ICT |
| *Most important Chinese companies* | Wanhua, Huawei, ZTE, Lenovo, Sevenstar Electronics, BYD Electronics, ZMJ, Comlink, Yanfeng, China–CEE Fund | Liu Gong Machinery, Huawei, ZTE, Haoneng Packaging, Shanxi Yuncheng Plate-making Group, Sino Frontier Properties, China Everbright International | Shanxi Yuncheng, Changhong, SaarGummi, Noark, Huawei, ZTE, Shanghai Maling, COSCO, YAPP, CEFC, Buzuluk Komarov, China CNR | SaarGummi, ZVL Auto, Inalfa Roof Systems, Mesnac, Lenovo, Huawei |

Source: Own compilation based on interviews, data from Orbis, and corporate publications

The main entry modes of, and sectors targeted by, Chinese investment are similar in all V4 countries, though these are more diverse in Hungary and Poland. Both privately-owned and state-owned enterprises are present, but Chinese companies investing here tend to fall into the former category. Although the main entry mode used to be greenfield in the first wave of Chinese investors, mergers and acquisitions (M & A) became more frequent later on, especially after the 2008 global economic and financial crisis. However, the V4 countries are home to just a small number of successful, globally competitive companies

in the region, which explains the drop in M & As in recent years. Another reason is the motivation of Chinese companies to gain access to brands and new technologies and to discover market niches to fill on the European markets since 2008. Chinese greenfield projects have also targeted less developed regions of Europe with lower factor costs. The V4 region loses out in this competition. Not only does it offer few M & A deals, it is less attractive than the Balkans for hosting greenfield projects. Nevertheless, the V4 region remains a key location for Chinese multinationals, as it is valuable as a manufacturing or logistics base, and the rise of electric vehicle production could also boost greenfield investments into the region.

### *Russian OFDI*

The investment activity of Russian (Soviet) companies in the V4 region remained limited until the collapse of the communist regimes and the dissolution of the Soviet Union. In the mid-1980s, only a few joint enterprises operated in the non-Soviet states of the Council for Mutual Economic Assistance. Their number jumped, however, as foreign-trade rights expanded in the Soviet Union under Gorbachev's Perestroika and joint-venture legislation was improved in Eastern Europe (Liuhto 2001: 36).

Western sanctions have strongly impacted Russian OFDI activity since 2014, forcing asset sales in the US, the EU and Ukraine (Kuznetsov 2021). Although its share had decreased, Europe's leading role in Russian OFDI had remained unchallenged before the 2022 Russian invasion of Ukraine.

The CBR's directional statistics show that the CEE region accounted for 3.5% of the Russian OFDI stock at the end of 2021, while this share was only 0.8% for the V4 countries. Therefore, in contrast to the Chinese case, the share of the V4 in Russian FDI stock in CEE amounted to only 22.2% at the end of 2021. This is relatively low compared to non-EU CEE countries, which contributed 32.8% of the Russian FDI stock in CEE16 (i.e. CEE minus Kosovo) (CBR 2023). In addition, a significant part of the Russian FDI had already been present in CEE prior to these countries' accession to the EU in 2004, 2007 and 2013. This does not mean that the benefits of operating in the EU is unimportant to Russian investors, but in many cases the types of investment targets differ from those of the Chinese. Russian companies also began to expand abroad earlier and, in doing so, they took advantage of privatisation opportunities in CEE.

CBR data suggest that Czechia hosted the largest Russian FDI stock at the end of 2021, dwarfing that of the other three V4 countries combined (CBR 2023). Mirror statistics help obtain a more accurate picture of Russian presence in the V4, even if individual company data are still necessary to get the whole picture. Presented on an immediate investor basis, statistics from central banks in Czechia and Poland – using the OECD database – indicate lower figures for

2021 than the CBR data (in Czechia and Poland, roughly half the size of the CBR data). In contrast, the Hungarian national figure is much larger than that of the CBR, while the Slovak national data contain negative values. As indicated, data according to the ultimate investor are also available in Czechia, Hungary and Poland. While these data for 2021 suggest higher values in Hungary and Poland, the Czech ultimate investor figure is somewhat lower than that based on an immediate basis. These ultimate investor data put Hungary in the first place between 2018 and 2021. Not only is the share of the V4 in Russian OFDI stock small, but the role of Russian FDI in the V4 is also very limited. However, low shares do not automatically imply that these FDI relations are irrelevant. Just like in the Chinese case, there are Russian investments in the region that are important for both sides.

**Table 3: Russian FDI stock in the V4 in absolute terms and as a percentage of total IFDI stock, 2013–2021 (million USD and per cent)***

| | | 2013 | | 2014 | | 2015 | | 2016 | |
|---|---|---|---|---|---|---|---|---|---|
| | | I | U | I | U | I | U | I | U |
| Czechia | M USD | 570 | 634 | 690 | 716 | 715 | 657 | 752 | 800 |
| | % | 0.4 | 0.5 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.7 |
| Hungary | M USD | 181 | .. | 238 | 515 | 216 | 468 | 292 | 644 |
| | % | 0.1 | – | 0.1 | 0.2 | 0.1 | 0.2 | 0.1 | 0.3 |
| Poland | M USD | 358 | 1 713 | 434 | 1 417 | 403 | 1 048 | 323 | 841 |
| | % | 0.2 | 0.8 | 0.2 | 0.7 | 0.2 | 0.6 | 0.2 | 0.4 |
| Slovakia | M USD | –389 | .. | –375 | .. | –183 | .. | –225 | .. |
| | % | – | – | – | – | – | – | – | – |

| | | 2017 | | 2018 | | 2019 | | 2020 | | 2021 | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | I | U | I | U | I | U | I | U | I | U |
| Czechia | M USD | 742 | 956 | 799 | 793 | 1 016 | 862 | 1 163 | 1 086 | 1 165 | 1 071 |
| | % | 0.5 | 0.6 | 0.5 | 0.5 | 0.6 | 0.5 | 0.6 | 0.6 | 0.6 | 0.5 |
| Hungary | M USD | 542 | 859 | 750 | 1 025 | 961 | 1 204 | 835 | 1 113 | 978 | 1 206[a] |
| | % | 0.2 | 0.3 | 0.4 | 0.6 | 0.4 | 0.5 | 0.2 | 0.3 | 0.3 | 0.3 |
| Poland | M USD | 443 | 991 | 472 | 775 | 239 | 802 | 293 | 1 099 | 250 | 519 |
| | % | 0.2 | 0.4 | 0.2 | 0.3 | 0.1 | 0.3 | 0.1 | 0.5 | 0.1 | 0.2 |
| Slovakia | M USD | –244 | .. | –191 | .. | –226 | .. | –161 | .. | –177 | .. |
| | % | – | – | – | – | – | – | – | – | – | – |

* With SPEs. [a] Email information from the MNB (18 December 2023).
I = immediate; U = ultimate; .. = not available; – = not applicable
Source: OECD (2023)

By the end of 2009 and 2010, Hungary enjoyed a leading position in CEE in terms of attracting Russian FDI. This proved to be a temporary uptick because it was due to a single item, the acquisition of shares in the Hungarian oil and gas company Mol by Surgutneftegaz, Russia's third-largest oil producer. Because of local resistance to the takeover, Surgutneftegaz sold the stake to the Hungarian government in 2011 (Panibratov 2017: 43). This example demonstrates that

Russian FDI stock, much like the Chinese, is largely determined by a few transactions in the V4. Typically, because only companies above a certain threshold are screened, a small number of target companies are involved in the official national statistics.[6] Interestingly, several Russian-owned companies appear in official FDI statistics in Hungary that are owned by Russian individuals and not Russian companies. On the other hand, in contrast to the Chinese case, divestment is regular among Russian investors in the V4 due to failed businesses or other reasons. For example, Lukoil sold its petrol stations in the V4 in the mid-2010s, and Sberbank agreed in 2021 – thus before the sanctions-related insolvency of its European arm in 2022 – to sell its remaining units in CEE except for the Czech unit. In one case, a Russian owner even disposed of its troubled company in the V4 to another Russian investor. Russian heavy industry and manufacturing conglomerate OMZ sold the Czech Pilsen Steel to the Russian-owned United Group in 2010. The Czech company was subsequently acquired by the German Max Aicher in 2020. As a result of the 2022 war in Ukraine and the sanctions, Russia has started to divest from some of its V4 assets.

Except for some investments in the primary sector, Russian FDI has been channelled into the manufacturing and services sectors (Table 4). A known example of an (unsuccessful) operation in the primary sector was the activity of Gazprom Neft. The state-controlled gas giant Gazprom's oil arm and Russia's fourth-largest crude producer was in Hungary via Serbia's NIS oil company, the majority of which is owned by Gazprom Neft. Overall, Russian natural-resourced-based giants face poor prospects for access to raw materials in the V4. Russian FDI has been made in a wide variety of industries in the V4. In addition to hydrocarbons, iron/steel and machinery, these include banking, software and information technology, engineering, electronic production, real estate, logistics/transportation, agriculture, the light industry and others. Besides, Russians have established a palpable presence in real estate in the famous Karlovy Vary spa resort in Czechia and the spa city of Hévíz in Hungary.

Among the large projects, acquisition is the main entry mode, though greenfield investments have also taken place (Table 4). An early example for the latter is the construction of the Polish section of the Yamal–Europe gas pipeline commissioned in 1999, which runs from Russia to Germany across Belarus and Poland. Russian participation in acquisitions through privatisation was uncommon in the V4 in the 1990s but was still possible in the 2000s during the golden age of the Russian MNEs. However, the Russians, like the Chinese, had fewer opportunities for acquisitions even before Russia's 2022 invasion of Ukraine and the subsequent imposition of sanctions, but this is less relevant because both acquisitions and greenfield projects have become extremely difficult to manage in the new situation.

6 However, this does not cause much distortion in statistical terms.

**Table 4: Characteristics of major Russian investment in the V4***

| | Hungary | Poland | Czechia | Slovakia |
|---|---|---|---|---|
| *Entry mode* | M & A, joint ventures, greenfield | Joint venture, greenfield, M & A | M & A, joint ventures, greenfield | M & A, joint venture, greenfield |
| *Main industry/ activity* | Natural gas sales, banking, metallurgy, energetics machinery, nuclear power plant construction, logistics and transportation, railway machine-building, commercial television broadcasting services, fertilizer production and sales | Natural gas transmission, liquefied petroleum gas and liquefied natural gas sales, coal sales, fertilizer sales, electricity trading, pipe production, steel distribution, sales of roofing, waterproofing, and thermal insulation materials as well as mineral wool production, software, IT, engineering | Gas and electricity sales, natural gas storage, ferrovanadium production, nuclear power industry (technology supply, engineering, and equipment modernisation), valves manufacturing, aircraft manufacturing, software and electronic production, workwear manufacturing, banking, processing of secondary materials containing precious metals, accommodation and catering, real estate operations, production of flexible packaging, accounting services, sales of roofing, waterproofing, and thermal insulation materials, plastic casing production, industrial seal manufacturing, metallurgical products sales, water turbine production, frozen fish wholesales | Gas and electricity sales, helicopter services, power plant construction, production of transformers, paint, coating, and adhesive manufacturing |
| *Most important Russian companies* | Gazprom, Sberbank, Vnesheconombank, Atomenergomash (Rosatom), Atomstroyexport (Rosatom), Russian Railways RZD, Transmashholding, NTV, EuroChem | Gazprom, Novatek, Kuzbasskaya Toplivnaya Company – KTK, Siberian Coal Energy Company – SUEK, PhosAgro, Inter RAO UES, Severstal, Technonicol, Kaspersky, Ekoton | Gazprom, Evraz, OMZ (Gazprombank), Atomenergomash (Rosatom), Komplektenergo, ChelPipe (TMK), Ural Mining and Metallurgical Company – UMMC, NVision (Sistema), Vostok-Service, Sberbank, Globalnoe Razvitie (Best Kompani), Svyazinvestneftekhim, Ekspotsentr, Intourist (Sistema), Avtovaz, Danaflex, Lukoil, Technonicol, Agrokom, Temac, Mechel, Tyazhmash, Nakhodka Active Marine Base | Gazprom, UTair, OMZ (Gazprombank), Rosenergotrans, Ekopol |

* The table reflects the situation in 2021. Since then, several Russian companies have decided to divest from companies in the four countries surveyed.
Source: Own compilation based on interviews, data from Orbis, and corporate publication

## Host-country (pull) determinants of Russian and Chinese MNEs in the V4

### *Chinese MNEs*

The labour market is a key macroeconomic pull factor making the V4 countries a favourable investment destination for Chinese investors. A skilled labour force is available in sectors for which Chinese interest is growing, with labour costs being lower than the EU average. Similarly, corporate taxes can also play a role in the decision of Chinese companies to invest in the region. Nevertheless, a skilled labour force and corporate taxes are pull determinants in theory, but the practice of Chinese investment shows a messier picture. After all, there is more investment from China in the V4 countries (especially in Czechia, Hungary and Poland) than in Romania or Bulgaria where labour costs and taxes are lower. This can be explained by the theory of agglomeration (Venables 1996) as total IFDI in the V4 is the highest in the broader Central and East European region.

Although the above-mentioned efficiency-seeking motives play a role, the main type of Chinese FDI in the V4 countries seems to be market-seeking investment. By entering these markets, Chinese companies have access to the whole EU market. Moreover, they might also be attracted by Free Trade Agreements between the EU and third countries and by the EU policies related to neighbouring countries. This is a reasonable driver as their V4 subsidiaries are meant to sell products in the V4 host countries, other EU member states and outside Europe, such as Northern America (Wiśniewski 2012: 121). Based on the interview results, Chinese companies wanted to operate in the V4 due to their already existing businesses in Western Europe and to strengthen their presence in the wider European market. Moreover, through their V4 subsidiaries, Chinese firms can participate in public procurements and access EU funds or, by investing in the V4 food industry, they can export EU-certified agricultural products to China and, by doing so, to improve food safety in the country. In addition, there are also cases of Chinese companies following their customers to the V4 region.

As for supranational institutional factors (Table 5), the change in the V4 countries' institutional setting due to their economic integration into the EU has been an important driver of Chinese OFDI in the region, especially in the manufacturing sector. The 2004 EU membership of the V4 allowed Chinese investors to avoid trade barriers, and the V4 could serve as an assembly base for Chinese companies. The second wave of Chinese FDI in the V4 dates back to the global economic and financial crisis, when financially distressed companies all over Europe, including the V4, were often acquired by Chinese companies.

Another aspect of EU membership that has induced Chinese investment in the V4 countries was institutional stability (including, e.g. the protection

**Table 5: Major characteristics of analysed Chinese companies in the V4**

| Macroeconomic pull factors | Institutional pull factors | |
|---|---|---|
| | Supranational | National |
| Market access | International and regional investment and trade agreements, free trade agreements | Host-government policies (including strategic partnership agreements between the government and certain companies) |
| Low factor costs (resources, materials, labour) | Advanced institutional setting, institutional stability (such as intellectual property rights protection) | Tax incentives, special economic zones |
| Qualification of labour force | European production and services standards (such as product safety standards) | 'Golden visa' programmes (residence visa for a certain amount of investment) |
| Various opportunities for asset-seeking companies: brands, know-how, knowledge, networks, distribution channels, access to global value chains, etc. | Chance for participation at EU-level public procurement processes | Institutions such as banks, government-related investment promotion agencies (IPAs) |
| Company-level relations | – | Possibility for more acquisitions through privatisation opportunities |
| The high level of technology | – | Home-country diaspora in the host country |

Source: Own compilation based on the reviewed literature and company interviews

of property rights). The importance of this aspect is clear given the unstable institutional, economic and political environment in their home country. These findings are in line with those of Clegg and Voss (2012: 101) who argue that Chinese FDI in the EU shows 'an institutional arbitrage strategy' as 'Chinese firms invest in localities that offer clearer, more transparent and stable institutional environments'. Such environments, like the EU, offer greater planning and property rights security, as well as dedicated professional services that can support business development.

National-level institutional factors include, for example, strategic agreements, tax incentives and privatisation opportunities. Based on responses from interviewees, Chinese companies indeed appreciate business agreements supported by the respective host-country government. Thus, the high-level strategic agreements signed by the Hungarian government with foreign companies investing in Hungary, or the special economic zones created by the Polish state could have also spurred Chinese investment in the region. Moreover, personal

(political) contacts between representatives of the respective host-country government and Chinese companies have also proved to be important when choosing a host country in the V4 region.

Based on interviews, we also found other factors, such as the size and feedback of the Chinese ethnic minority in the host country, or possibilities of acquiring visa and permanent residence permits. This is in line with numerous studies (e.g. Hijzen et al. 2008; Blonigen & Piger 2014) showing that companies interested in acquiring foreign assets are motivated by a common culture and language as well as trade costs. This correlation is evident in the Hungarian case, a country with both the highest stock of Chinese FDI and the largest Chinese diaspora in the region. Between 2013 and 2017, Hungary even offered a special 'golden visa' programme, which enabled foreign investors to acquire a residence visa in exchange for investing a certain amount of money.

In addition to the above-mentioned supranational- and national-level institutional pull factors, political relations are also consequential for the intensity of FDI interest from China. Hungary, for example, is strongly committed to China. Regardless of political orientation, Hungarian governments have been developing relations with China for over two decades. Hungary launched the 'Eastern opening' policy in 2012 meant to diversify foreign economic relations. Although Prime Minister Orbán's government, which has been in power since 2010, has emphasised that it would like to maintain Hungary's strong and important economic relations with its traditional Western partners, the main objective of this policy has been to reduce Hungary's economic dependence on trade and investment with the West by improving economic relations with the East, particularly China.

Besides promoting economic relations with China, Hungarian governments have been rhetorically supporting China over many sensitive issues. Hungary was the first European country to sign a memorandum of understanding with China on promoting the Belt and Road Initiative (BRI) during the visit of China's foreign minister Wang Yi to Budapest in 2015. The Hungarian government was also very keen on promoting the Budapest–Belgrade railway, a construction project under the BRI umbrella. When signing the construction agreement in 2014, Prime Minister Orbán called it the most important moment for the cooperation between the EU and China (Keszthelyi 2014).

In addition to supporting China's infrastructural endeavours, Hungary (and Greece) prevented the EU from backing a court ruling in 2016 against China's expansive territorial claims in the South China Sea (The Economist 2018). In 2018, Hungary's ambassador to the EU was alone in not signing a report criticising the BRI for benefitting Chinese companies and Chinese interests, and for undermining principles of free trade through its lack of transparency in procurement (Sweet 2018). Hungary is also the only EU country so far to have officially chosen Huawei to build its 5G network (Reuters 2019). The gesture has worked

out well and a long-awaited wish of the Hungarian government has come true since Huawei has recently established an R & D centre in Hungary (Horváth 2020). After the COVID outbreak, Hungary not only praised Chinese support in supplying medical equipment but was the first in Europe in approving the Chinese Sinopharm vaccine to speed up vaccination in the country.

In contrast, Czechia has a rather critical relationship towards China, and has criticised China over many issues, such as human rights or Tibet. Starting from this cold stance, in the mid-2010s, Czechia's relationship with China began to warm for a few years as the Chinese leadership found common ground with Czech President Miloš Zeman. As our expert interviews confirmed, after Czech 'political sympathy' emerged, inflows of Chinese FDI to Czechia started to increase, too. As a case in point, President Zeman, the only high-level European politician visiting the 2015 Chinese celebrations of the end of World War II, declared that he wanted his country to be China's 'unsinkable aircraft-carrier' in Europe (The Economist 2018). Zeman also had a Chinese adviser on China coming directly from a Chinese company with a controversial background. However, as soon as the biggest Chinese investor to Czechia, CEFC, came under investigation by Chinese authorities for 'suspicion of violation of laws' (Lopatka & Aizhu 2018), critical voices intensified in Czechia. As a result, Czech–Chinese relations have been cooling again. Since then, new Chinese FDI flows have not arrived, and divestment has taken place.

Poland used to be more enthusiastic about China but has taken a more cautious, even critical, stance since the mid-2010s. For Poland, high trade deficits represent one of the biggest problems with regard to the country's bilateral ties with China. Polish imports from China are about 12 times higher than Poland's exports to China, with the deficit reaching EUR 20 billion according to Eurostat 2021 data (Eurostat 2023). Potential security risks of Chinese investments prompted the Polish government to reconsider its rather positive approach toward China and to use harsh rhetoric about trade deficits as a serious political problem. This reconsideration was signalled, for example, by the cancellation of public tenders and by several political statements (Szczudlik 2017). As a probable result of this, Poland has not received sizeable amounts of new investment from China.

Slovakia was generally indifferent towards China over the past years. While it supported the '16+1' format and the BRI, it did so with less enthusiasm and tended to take a 'wait and see' approach. As a result, Chinese FDI is relatively negligeable compared to the other three countries.

### *Russian MNEs*

As in the Chinese case, Russian investment in the V4 is dominated by market-seeking, complemented by efficiency-seeking and strategic asset-seeking mo-

tives. The V4 countries rely heavily on Russian energy sources, though to varying degrees,[7] and Russian energy MNEs headed towards the vertical integration of supply chains. However, this direction was challenged well before Russia's 2022 invasion of Ukraine, and some of these assets were sold off in the pre-war period. The desire to access new technologies, know-how and knowledge points to strategic asset-seeking. To give an example, technology and easier access to East European markets were reportedly the reasons behind the takeover of three Skoda Holding subsidiaries in Czechia by Russian heavy machine-building OMZ (Power Machines 2004). There were similar considerations in another case. Unique know-how, a well-developed technological background, and a highly qualified staff were the motives of Urals Mining and Metals Company (UMMC) to acquire a controlling stake in the Czech aircraft manufacturer Aircraft Industries, formerly LET Kunovice (OS KOVO 2016). Thus, these two examples show that strategic asset-seeking behaviour was pursued in conjunction with market-seeing (the case of OMZ) or efficiency-seeking (the case of UMMC) motives. In addition to market-seeking, efficiency-seeking motives were obvious in the case of Luxoft, a Russian-founded provider of software development services and IT solutions. Its expansion in Poland was driven by easy access to highly qualified IT staff in the country.

As with China, supranational institutional factors matter for Russia, but their specific importance depends on the case (Table 6). Regarding trade barriers, Russian steel exporters constitute a prime example as they are subject to import regulation and market protection on the EU market. For example, the aim of entering the 'closed' European market was said to be behind the acquisition of the Czech Vítkovice Steel by metallurgical and mining company Evraz (though Evraz sold this company later) (Krainová 2005). With Russia's accession to the WTO in 2011, EU quotas for Russian steel products ceased, though Russia had not fully utilised the quotas even before that.

The EU's institutional stability was an attraction also for Russian investors, though due to a bad Russian business environment, Russian firms possess such firm-specific ownership advantages which can be used abroad (Kalotay 2015: 245). However, this institutional stability was relative even before the sanctions introduced in 2014. Among factors negatively affecting Russian investors operating within the EU internal market, one is the EU's Third Energy Package on the creation of single gas and electricity markets in the EU, and its unbundling requirement regarding different activities. The latter, for example, hit Gazprom's Yamal–Europe gas pipeline in Poland. Currently, however, the most important of these negative factors is the EU's sanctions policy towards Russia.

For Russian investors, the role of institutional cooperation between the governments of host countries and Russia was not as decisive as for China before

7 By 2023, however, Poland had almost eliminated its energy imports from Russia.

**Table 6: Major characteristics of analysed Russian companies in the V4**

| Macroeconomic pull factors | Institutional pull factors | |
|---|---|---|
| | Supranational | National |
| Market access | The EU's internal market integration strategy | Activities related to bilateral intergovernmental commissions, central and local government support through activities of investment, trade and development agencies, investment support grants |
| Labour costs | – | Lower taxes |
| Qualified labour force | – | Residence permits, knowledge of Russian language and culture, home country's diaspora, quality of living |
| Brands, know-how, knowledge, technology | Protection of intellectual property rights | Political stability, rule of law, public procurement |

Source: Own compilation based on the reviewed literature and company interviews

the 2022 war, i.e. in the period under examination. This does not mean that there is no such high-level framework bringing in Russian investors. Institutional mechanisms such as intergovernmental commissions exist to promote bilateral economic relations between Russia and the V4 countries.

In the V4, Czechia hosts the largest Russian diaspora, though its number depends on the definition used for the measurement. The Russian Rakhimkulov family living in Hungary plays a noted role in Russian investments in Hungary (among other projects, in constructing an intermodal terminal near the Hungarian–Ukrainian border, which was inaugurated in 2022), even if investment by a Hungarian resident individual (here a Hungarian citizen of Russian origin) cannot be considered Russian OFDI in statistical terms. Russian clients played a role, albeit to varying degrees, in attracting Russian FDI into the V4's banking sector, such as in investments by the First Czech–Russian Bank in Czechia and Sberbank in various CEE countries (Global Trade Review 2009; Hovorka 2013).

Czechia is among the top destinations for real-estate purchases by Russians. According to a 2021 survey, Russian-speaking investors consider real-estate investment in Czechia as a means to preserve capital. In Hungary, the objective is to increase capital. Diversification of the investment portfolio is also an important motive for investors in Czechia (Tranio 2021). In Hungary, Russian citizens were first among non-EU foreigners buying residential real estate for

many years until 2014. Since 2015, Chinese buyers have largely overtaken the Russians. Many Russians also got Hungarian residence permits through the golden visa programme, though the Chinese were by far the greatest buyers of Hungarian residence permit bonds.

High-level institutional and friendly relations correlated with the growth of Russian FDI in Hungary since the mid-2010s. In Hungary, Russia found an unlikely business partner when former Hungarian ambassador to the UK Kristóf Szalay-Bobrovniczky had two joint ventures with Russia's largest railway machine-building company Transmashholding. Since then, however, both the Hungarian and Russian owners have pulled out of the companies, the former following his appointment to defence minister in 2022, the latter as a consequence of the 2022 war and the sanctions. In another case, the relocation of the headquarters of the Russian-led International Investment Bank to Budapest demonstrated the significance of close ties between the two countries, though after the 2022 Russian invasion of Ukraine, CEE owners withdrew their ownership interests in the entity one by one, ultimately followed by the Hungarians in 2023 under US pressure. On the other hand, troublesome investments, such as in the ISD Dunaferr steel plant or formerly in Malév Hungarian Airlines in Hungary, could long be kept on the high-level bilateral political agenda.

Common features the V4 states share in their relations with Russia include troublesome historical legacies, relatively minor and narrowing economic relations (except for energy), and sharp party divisions regarding the Russian nexus. The latter means that a government change could have considerable effects on bilateral ties.

Hungary and Poland are positioned as two extremes in the V4 in terms of the respective warmth and coldness of political relations with Russia. Viktor Orbán's shifting attitude toward Russia makes the Hungarian case special. After 2010, he made a full turnaround as part of his 'Eastern opening' and transformed from a staunch critic into one of the fiercest proponents of cooperation with Russia. However, this does not mean that Hungary fully attends to Russia's interests. For instance, the hostile takeover attempt of Mol by Surgutneftegaz was reversed with the support of both governing and opposition parties in 2009–2011. Over the past decade, however, a full commitment to the relationship has become the defining feature. Viktor Orbán often acts as a consensus buster in symbolic issues in the EU, independent of whether it is about Russia or China. Hungary has, for instance, repeatedly criticised EU sanctions against Russia over its invasion of Ukraine, and sometimes even delayed measures to wrestle concessions.

Russia is a surprisingly small investor in Poland. This is puzzling not simply because of the two countries' common economic heritage and geographic proximity, but because Poland was the second main destination of Russian OFDI behind the United States in 1995–1999 (Kalotay 2003: 11–13). Negative

political and public perception of Russia is definitely a factor in keeping Russian OFDI low in Poland. Poland has been the target of a couple of unsuccessful takeover attempts made by Russian firms. One example is the case of Polimex, a leading construction company in Poland, which was approached by Russia's VIS Construction Group in 2012. Another was Russian mineral fertilizer producer Akron's failure to acquire Poland's top chemicals group Azoty Tarnów in 2013–2014. These deals were prevented with the active participation of the Polish government. The 2022 war has further worsened Polish–Russian relations, while leaving Hungarian–Russian relations virtually untouched.

Czechia, too, often takes a very critical position towards Russia (Rácz 2014). Although former Czech presidents Miloš Zeman and Václav Klaus have been amongst the country's most pro-Kremlin politicians, their influence is becoming less relevant. Russia's 2022 invasion of Ukraine marked a turning point even for Zeman, who called Putin a 'madman'. For the Czech people and the government, the turnaround happened even before the 2022 war as a consequence of Prime Minister Andrej Babiš's April 2021 public announcement on the involvement of Russian secret agents in the 2014 explosions at the Vrbětice ammunition warehouses. Bilateral relations reached an all-time low with Czechia's inclusion (alongside the US) on Russia's official list of 'unfriendly countries' in May 2021. Still in April 2021, Russia's Rosatom was excluded from the tender to expand the Czech nuclear plant at Dukovany (Kratochvíl & Sychra 2022). An earlier example of the location disadvantage of negative approaches towards Russian capital is that of Evraz. The company complained that the acquisition of Vítkovice Steel in Czechia in 2005 (the first international acquisition of Evraz) was more difficult because of the common communist past of the two countries, in particular, due to fears on the Czech side (Economist Intelligence Unit 2007).

Slovak–Russian relations completely froze over with Russia's annexation of Crimea in 2014, which concluded an already tense period of the relationship. Cyberattacks and disinformation campaigns identified by the Slovak authorities led to the expulsion of Russian diplomats from Slovakia in 2020. This issue was followed by the failure to use the Russian Sputnik V coronavirus vaccine in Slovakia in 2021 amid a coalition crisis due to disagreements on the vaccine deal leading to the replacement of Prime Minister Igor Matovič (Mokrá 2022). By contrast, in Hungary, Sputnik V played an important role in the vaccination campaign. More recently, however, Slovakia's ties to Russia have begun to warm up with the election of Robert Fico to prime minister at the end of September 2023. The change is visible in the Slovak government estranging its Western allies and adopting a friendlier stance towards Moscow, a change of sympathies that has not gone unnoticed by the Kremlin itself (Hornak & Whitelaw 2024).

## Conclusions

This paper offered an encompassing view of Chinese and Russian EMNEs' involvement and interest in the V4 countries. It demonstrated that the reasons for FDI in any particular case need to be understood contextually, with due attention to the factors specific to the EMNE and the host country in question. Chinese and Russian MNEs are responsive, in particular, to macroeconomic, institutional and political conditions. These factors can be found behind market-, efficiency- and strategic asset-seeking business decisions. While Russian companies have been present in the V4 for some time, this is a newly emerging destination for Chinese investors. Because of this, investment flows are hectic and highly volatile, depending on the size and frequency of transactions closed. The ownership structure of Russian and Chinese companies is mixed. Some are state-owned like Wanhua, Gazprom or Rosatom, while others like Huawei, BYD or Lukoil are privately owned, even if only nominally. Some of these companies are often referred to as 'national champions' that grew up with robust state support even if they are not directly state-owned.

The aim of the paper was to scrutinise these conditions and show that they correlate with the inevitable ups and downs of FDI interest emanating from Russia and China. There is no denying that low labour costs, access to West European markets, tax incentives and other endowments play a key role in sustaining this interest. But whether these factors do stick in an investor's mind may depend on the broader political receptivity of the host environment. As such, it seems that politics remain very often both the matchmaker and the destroyer of business ties between emerging companies and foreign markets.

In so arguing, the paper demonstrated empirically that the quality of political relations between foreign countries and the V4 region goes a long way to explain both upticks and downturns of FDI interest. This is certainly the case for China. When relations with the Beijing government are properly tended to, there is a discernible increase in inflows of Chinese FDI. Neutral positions are inconsequential, if not slightly discouraging, whereas critical statements and foreign policies towards China are counterproductive. These logics are evident as Hungary hosts the biggest stock of Chinese FDI in the broader CEE region, all the while it continues to shower the Beijing government with political statements antithetical to the Western consensus. Another example is the positive shift registered in Czech–Chinese relations and orchestrated by Miloš Zeman, but also the deterioration of these ties once the biggest Chinese investor in the country was exposed for its shady and illegal activities. In Poland, the Chinese FDI stock remains stagnant due to the country's overt criticism towards China. As for Slovakia, there is, once more, a noticeable correlation between the lack of political effort to host Chinese MNEs and the low levels of Chinese FDI in these countries. It remains to be seen whether changes in government in Slovakia

and their political sympathies towards Russia generate any uptick in Russian EMNE activity in the country. The same question applies to the future of Chinese investment in Slovakia, given the potential to follow the Hungarian path.

In fact, the dynamic and rapidly changing relationship between EMNEs and the V4 countries is the very reason why theorising has proved to be difficult. While the literature reviewed in Section 2 is not oblivious to the influence of institutional and political factors attracting FDI to particular countries, this correlation deserves more study, and EMNEs' interest towards the V4 region is still a gift that keeps giving. EMNEs continue to pivot towards foreign investment markets against the backdrop of state support. Yet, because they have matured with such assistance in their domestic environment, they seem to have an interest in countries whose markets are strongly regulated by the state's 'visible' hand. Since many of the V4 countries are undergoing such an interventionist turn in their internal policies, this may make them more attractive for Chinese and Russian companies. Further, if these countries are clear about their support for China's and Russia's role in international politics today, this can generate even more interest from Chinese and Russian EMNEs.

Though it exceeds the limits of this paper, further research is needed to study the link between Hungary's illiberal turn and the growing Russian and Chinese footprint in the country (Rogers 2019, 2020; Turcsányi et al. 2019). That this link exists is fairly certain, but if there is any causality underlying it, its direction is much less clear. Hungary's illiberalism is hardly a monocausal phenomenon, yet its steady interest in deepening ties with China is also not independent of it. Three decades after its democratic transition, Hungary thus serves as an ideal springboard for authoritarian powers because it is not afraid 'to go against the spirit of the age and build an illiberal political and state system' (Orbán 2014). In order to investigate the root causes of this behaviour of Hungary, future research may investigate why countries like Hungary in Europe's periphery turn to Russia and China, while others like Czechia and Poland do not.

Finally, the 2022 Russian invasion of Ukraine is upending FDI flows and business deals between Russian companies and the V4 countries. Prior to the war, the following ranking of the V4 countries could be discerned between the two ends of the spectrum of warmth and coldness of political relations with Russia: Hungary, Slovakia, Czechia and Poland. Although this ranking is not directly reflected in Russian FDI, the countries on the two extremes are revealing. Historical disagreements between Russia and Poland and the general hostility to Russian investors have resulted in low Russian FDI stock in Poland, while a new, decade-long interest-based friendly relationship between Hungary and Russia has begun to show up in Russian FDI numbers in Hungary.

At the same time, there is much variation between these two extremes, which reflects the validity of the very argument this paper had made. Despite Russia's invasion of Ukraine in 2022 and the convergence it precipitated amongst

the V4 against Moscow, the regional consensus is being undone and relations with Russia and China come to reflect, once more, the changing political preferences of incumbent governments in the V4 countries. Though Hungary used to be the odd one out, it no longer is with Slovakia's turn to Russia. As we have stressed in this study, attention to these political factors are key for understanding Russian and Chinese EMNEs' interest in the V4 region.

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# National Pride or Economic Utility? Attitudes towards Science in the Light of Political Polarisation[1]

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sciendo

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**Abstract:** *The paper deals with the political aspects of the perception of science. The relevance of the topic is underpinned, among other things, by the public policy significance of trust in science and the links between national science and national identity. The literature relates the perception of science to ideological positions on the one hand, and to partisan bias on the other. The research underlying the study investigated the relationship between respondents' attitudes towards science and their political preferences using a representative questionnaire sample of 1000 Hungarian respondents. In Hungary, characterised by a high degree of partisan polarisation, we expected the influence of party preference rather than ideological position on the perception of science. A detailed exploration of attitudes yielded more nuanced results than assumed: those who identified themselves as right-wing were less pro-science in general, but the utilitarian perception of science was influenced by party preference in addition to education, i.e. voters of the current government expected more utility and economic returns from science. The perception of science was also influenced by the level of political information. The study also relates the impact of partisan bias to the reception of science policy measures of the Orbán governments.*

**Keywords:** ***science scepticism, partisan bias, polarisation, science policy discourse***

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## Introduction

There are many ways of looking at the perception of science. One of the basic questions in a social science approach is the degree of trust in science by the lay members of society. From another point of view, science and scientific results can be seen as part of national culture, and can therefore be seen in the context of national identity. A problem often raised in political science is the question of public policy preferences based on scientific findings. Closely related to this is the question of utility: how does policy make use of scientific results? For example, while Hungarians are all proud of Katalin Karikó, inventor of the mRNA vaccine, there is no unanimity on how much public money the state should spend on science, including the question of what scientific goals and what types of research should be supported. Furthermore, the relationship between science and politics is also a matter of neverending debate: in return for state funding, can politics interfere (and if so, to what extent) in the functioning of science?

While trust in science is relatively high in Hungary in general, there are a number of issues that are more specific but also complex and difficult to understand, such as climate change or the COVID pandemic, which involve a number of political decisions. Therefore, it is highly likely that the narratives presented by political actors play a role in shaping opinions on these issues. In addition, in the highly polarised Hungarian political arena, in recent years a number of highly controversial government measures related to science could be observed that have provoked protests. It is therefore worth examining the links between political preferences and attitudes towards science.

This paper aims to contribute to the understanding of this relationship, based on data from a national survey. It is structured as follows: first, it presents the literature on the impact of ideological and partisan polarisation on perceptions of science, and then provides an overview of the context of the research in Hungary. Then the hypothesis and analytical strategy are presented, followed by the results. After presenting descriptive statistics of political preferences and science-related opinions, the latent dimensions of attitudes are explored and explained using regression models. In the conclusion, we summarise the results of hypothesis testing and explanations of science-related attitudes.

## Political bias and opinions on science

The spheres of science and politics interact at several points. In his work on the scientific field, Pierre Bourdieu argues that, although the most important characteristic of the field is that it operates according to its own internal norms, it is not independent of its social environment. Its relationship with the field of power is one of the most important determinants of the autonomy of the scientific field (Bourdieu 1975: 197, 1983). Political interference in the function-

ing of science can influence the achievement of structural positions and thus easily erode the internal norms of the field, leading to a deterioration in the quality of scientific work. From a public policy perspective on the relationship between science and politics, the notion of (hyper)instrumentalisation often arises, where science policies are used as a means to achieve political goals not directly related to science, in addition to or even instead of science policy-related goals (Hadley & Gray 2017).

Given the close and multifaceted relationship between science and policy, it is not surprising that a large body of research has addressed the relationship between policy preferences and attitudes on science.

These studies often try to offer explanations within the conceptual framework of political (ideological) polarisation or partisan bias. Ideological polarisation (i.e. for example, the extremity of left-right self-definition) can result in a society where there is little agreement on issues among different political actors (and their followers) (Fiorina et al. 2010; Patkós 2022). In this case, issues that are not subject to political contestation in less polarised societies can also become politicised position issues (Stokes 1992). The presence of partisan bias has a similar effect, but in this case it is not the ideological distance but (too) strong partisan identity that makes the range of politicised opinions broad and voters' policy preferences divided along party identity lines (Iyengar et al. 2012, Patkós 2023).[2] Attitudes to science are more influenced by religious, moral and political beliefs than by socio-demographic data such as age and social status (Rutjens et al. 2018).

According to the literature, each political ideology has its own 'favourite' scientific topic on which it takes anti-science views. Political conservatism is a predictor for scepticism in climate change (Rutjens et al. 2018). However, liberals are more accepting of anti-technology pseudo-scientific views such as homeopathy, anti-GMO or that using mobile phones causes cancer. Also, left-wingers tend to be anti-vaccine or anti-pharmaceutical because of their distrust of big corporations (Szabados 2019). In essence, science scepticism cannot be reduced to a single political cluster or camp, it prevails everywhere, just on different issues.

In the United States, science scepticism among Republican voters is a well-researched topic (Gauchat 2012; Lewandowsky et al. 2013). Longer-term data series show that, while a few decades ago conservative voters had the most trust in science, recently they have the least (Gauchat 2012). The correlation

2 In addition to partisan bias, another explanatory factor that often emerges in the political perception of science is populism, which is often associated with a general scepticism towards science as being anti-elitist and anti-institutional (Kennedy 2019). Research in Europe has shown a correlation between some aspects of populist politics and science scepticism, at least at the macro level: those countries with more popular populist parties also had higher levels of anti-(childhood) vaccination attitudes (Kennedy 2019).

holds even when controlling for education, and the authors explain it by the increasingly political nature of the issue. In addition to lower levels of trust in science, Republican voters are especially opposed to the public funding of scientific research and basing social policy on science. While scientific topics with policy implications are unpopular among free marketers in the US, science scepticism is not associated with, for example, opposition to vaccination (Lewandowsky et al. 2013).

Research on Europe, and Eastern Europe in particular, is much rarer in this topic. A comparative study of 24 countries on science scepticism found that the strongest relationship between political conservatism and science scepticism is clearly found in North America. The more culturally distant the society was from the United States, the less the perception of science depended on ideological positions, for example in Arab countries. Two East European countries were also included in this comparative study: in the case of the more 'Westernised' Poland, there was a correlation between conservatism and science scepticism, whereas in the case of Romania, no such correlation was found (Rutjens et al. 2022).

There are, of course, differences not only geographically, but also between different subjects within science in terms of the role of political bias. It is partly because of the immeasurably large regulatory implications that climate change has become one of the most politically divisive scientific topics of our time. Several studies have explored the relationship between partisan polarisation and climate change perceptions: in the US (Dunlap & McCright 2008) and in Europe, according to Eurobarometer data (McCright et al. 2016), the gap between right and left attitudes on climate change is widening, and a link between populism and climate scepticism has been demonstrated (Yan et al. 2022).

The other topic that has been much studied in terms of political bias is of course the COVID pandemic (Clinton et al. 2021; Conway et al. 2021; Farkas et al. 2022). The pandemic was a special time because of the global focus on science and the role of scientists. Heavy governmental action linked to scientific findings was compounded by uncertainties within the scientific community and the plethora of fake news and misinformation surrounding the pandemic – it is no wonder that most of the scientific facts about the pandemic were politically judged. The difference in attitudes and behaviour of Republican and Democratic voters in the United States towards the pandemic is well known. Clinton and his co-authors have even called the epidemic a 'Partisan Pandemic', and rightly so, as the partisan bias among Americans was even reflected in regional mortality rates (Clinton et al. 2021).

Studies suggest that politically biased science scepticism also exists on the 'supply side' of political actors' communication (Mede & Schäfer 2020). Populist leaders tend to be hostile to science and scientists because of their general anti-establishment and anti-elite rhetoric. Examples such as Donald Trump's 'gut instinct' (versus scientific evidence) or Jair Bolsonaro's similar

comments show that in science populism (Eberl et al. 2023), common sense triumphs over the 'ivory tower' of the academic elite.

However, a comparative study examined the impact of four populist leaders (Putin, Erdogan, Trump and Orbán) on the success of science-related populism, and found no systematic populist anti-science policies. In fact, all of the above leaders either left science funding unchanged or outright increased it. Moreover, scientific results also benefit nationalist rhetoric. Consequently, Putin and Erdogan engage in almost no anti-science rhetoric. However, the research shows that Donald Trump and (to a slightly lesser extent) Viktor Orbán do have a populist specificity in spreading misinformation on several ideologically important scientific issues. Donald Trump spreads misinformation on climate change, while Orbán spreads misinformation on some parts of Hungarian history.

However, the attack on academic freedom and autonomy, which clearly characterises authoritarian regimes, is not specifically anti-science, but the manifestation of a general authoritarian policy that also extends to culture and education. In this case, the aim of the authoritarian leader is to not have autonomous, potentially critical groups, but to have political control over science. This aim is achieved by reallocating resources and replacing academic leaders (Szabados 2019). In other words, authoritarian politicians often have more of a problem with scientists than with science, as we will see in Hungary below.

In sum, there are multiple, intersecting and complementary explanations for politically based science scepticism. Sympathies with anti-elitist and/or anti-institutional political trends, ideologically based opposition to regulation, and strong partisan identity may all influence attitudes towards science. Of all these factors, the present study focuses specifically on the role of ideological position and partisanship.

## The Hungarian context

It is a well-known fact from the political science literature that the level of political polarisation in Hungarian society is particularly high (Körösényi 2013; Patkós 2022). Accordingly, there are few issues that are judged in the same way by different political camps. It is important to clarify, however, that the high level of polarisation is not understood in terms of ideological positions (the right-left or even the conservative-liberal axis). One possible definition of ideological polarisation is to look at how far apart the median voter on the right and the median voter on the left are. Partisan polarisation, on the other hand, measures how differently government parties and opposition parties evaluate political events, such as the performance of the government (Patkós 2023). The two indicators are significantly positively related. However, while *ideological* polarisation increased in Hungary in the 2000s (Körösényi 2013), the trend reversed in the 2010s (Kmetty 2015). On the other hand, the level

of *partisan* polarisation remained extremely high throughout the last decade (Patkós 2022).

In spite of the high level of polarisation, there has not been much research in Hungary on the political bias of the perception of science. Eszter Farkas and her co-authors investigated the perception of COVID vaccines and science in general in the context of the COVID pandemic (Farkas et al. 2022). Their results showed that a respondent's position on the conservative-liberal scale influenced their perceptions of vaccines as well as science in general: the more conservative the respondents were, the more sceptical they were of vaccines and the less they trusted in science. In contrast, a respondent's party preference (measured in a pro-government/opposition dichotomy), despite the high level of partisan bias in Hungary, only affected general science scepticism, not attitudes towards vaccines. The authors explained this by the fact that the propagation of COVID vaccines was one of the few issues on which the Hungarian government and the opposition had similar positions (Farkas et al. 2022). However, it is reasonable to assume that if the research had distinguished between Eastern (Chinese, Russian) and Western (German/US, British) vaccines, on which political actors were far from unanimous, the effect of partisan bias would probably have been reflected in the COVID vaccine issue. [3]

The COVID pandemic thus created a special situation in Hungary, but the politicisation of the perception of science in a more general context was only partially addressed in the study referred to. What we would like to address in this paper is a more general impact of the political discourse on science. To clarify this question, we recall the other issues (outside the COVID pandemic) that have made science issues part of the political discourse in recent years in Hungary.

Hungary's Fundamental Law, adopted in 2011, protects the freedom of science, as did the previous Constitution. However, the Orbán governments, which have been in power continuously since 2010, have changed the previous structure of the scientific field on several points. Controversial science policy measures include, for example, the subordination of the previously independent National Fund for Scientific Research (OTKA) to the National Research Development and Innovation Office (NKFIH), the creation of new institutes for historical sciences, parallel to the existing network of academic institutions. However, although they were covered by the press, these measures did not really reach the attention of the wider public. The first case that caused a great political storm both in Hungary and abroad was the Lex CEU. This series of events, which ended with the departure of the Central European University to Vienna, is well documented (Bárd 2020; Enyedi 2018, 2022; Láncos 2021).

3 On the association between vaccine choice and sources of information, another study found that people who self-reported listening to politicians' advice on vaccination were more likely to accept Eastern (and British) vaccines (Kutasi et al. 2022).

The conclusion of legal analyses is that in this case the government restricted the freedom of science by a regulatory change. The so-called Lex HAS, i.e. the detachment of the Academic Research Institutes Network from the Hungarian Academy of Sciences, was assessed in a similar way (Láncos 2021; Pap 2021). In my previous analysis, I identified the Lex CEU as a textbook example of hyper--instrumentalisation (Kristóf 2021). The government's communication on science in these cases was not clear. Ideological arguments played a somewhat less important role in the debate over the separation of the HAS's research institutes than in the CEU case, with the greatest emphasis on instrumental arguments. Arguments about the economic utility of scientific results were often made in public by those supporting the government's position.[4]

These actions in relation to the academic institutional system fit well with the government's general attempts at elite exchange and the dismantling of autonomy in the cultural sphere (Kristóf 2017, 2021). Similar results were obtained by Szilvia Horváth (Horváth 2022: 20), who provided the most detailed analysis to date of the interference between the Orbán regime and the academic sphere. On the one hand, she identified the anti-elitist and anti-scientific elements that characterise the populist style in general. On the other hand, she explicitly assessed the abolition of academic autonomy as part of the Orbán regime's attempts at ideological and institutional hegemony, as part of the authoritarian exercise of power in other public policy areas. All of these governmental efforts are carried out in an expansive manner, with increasing intensity, creating planned and intended conflicts (Horváth 2022).

## Research question and analytical strategy

Taking into account the degree of partisan polarisation and the instrumental science policy measures described above, we wanted to know how the perception of science in Hungary is related to political attitudes. On the basis of the literature presented above, we put forward the following hypothesis:

H1: The effect of partisan bias. The political orientation of respondents plays a role in the perception of science. However, political differences in attitudes towards science in Hungary are not mapped along ideological differences but along party preference.

The hypotheses were tested by a nationally representative survey of 1000 respondents. The data was collected as part of the Median Institute Omnibus in June 2021, using a telephone (CATI) survey method. In the survey, we sought to map attitudes towards science in a sophisticated way. The respondents' agreement (on a Likert scale) with 12 statements about science was assessed, and the

4 For example, 'Hungary's economy is only a tiny fraction of the world economy. Hungarian taxpayers cannot be expected to fund basic research that will be utilised elsewhere' (Gábor Náray Szabó: Aunt Mary and science https://www.magyaridok.hu/velemeny/mari-neni-es-a-tudomany-3228115/).

latent structure behind the responses was explored using factor analysis. The two emerging factors were explained using linear regression models.

The respondents' ideological position (self-positioning on a 5-point left-right scale) and party preference (want/do not want a change of government) were considered as explanatory variables. Our reason for using the left-right scale rather than the conservative-liberal scale is that it is the most commonly used scale to measure ideological polarisation (Bafumi & Shapiro 2009; Lesschaeve 2017; Patkós 2023). In Hungary, it is also the most commonly used scale for the assessment of political preferences (Kmetty 2014). It can also be used for comparative purposes and correlates with a number of non-political attitudes and behaviours (Patkós 2022). While it does correlate with partisan divisions, it is distinct from mere party preferences (Tóka 2005).

Basic socio-demographic variables (gender, year of birth, place of residence, and education) and information about science policy were used as control variables. The latter was measured by familiarity with some science policy measures (Lex CEU, Lex HAS and the development of the Budapest campus of the Chinese Fudan University that was currently debated at the time of the survey).

## Results

### *Descriptive statistics*

The distribution of respondents' ideological positions is shown in Table 1.

**Table 1: Many people use the terms left and right to describe their political positions. How would you describe yourself in terms of your political position? (%)**

| | |
|---|---|
| Definitely left-wing | 5.9 |
| More left-wing | 10.4 |
| Neither left nor right | 45.4 |
| More right-wing | 15.7 |
| Definitely right-wing | 17.4 |
| Don't know, don't answer | 5.2 |
| Total | 100 |

Source: Author

It can be seen that the ideological polarisation, at least measured on the right--left scale, is not strong, as the distribution is unimodal, with almost half of the respondents classifying themselves in the middle. Thus, we do not see the U-shaped or strongly flat distribution typical of ideological polarisation (Pat-

kós 2023). It should be noted, however, that the scale is not symmetric. Only a minority of the 16.3 percent of left-wingers identify themselves as definitely left-wing, while more than half of the right-wingers, who are twice as many (33.1%), identify themselves as definitely right-wing (17.4%).

We measured the partisan divide by asking about government change (Table 2).

**Table 2: Overall, what do you think would be better, if after the next election... (%)**[5]

| | |
|---|---|
| there is a change of government | 43.1 |
| or the current government stays | 46.1 |
| Don't know, don't answer | 10.9 |
| Total | 100 |

Source: Author

Almost half of the respondents (46%) would prefer the current government to stay, 43 percent would prefer a change of government and 10.6% do not know or do not want to answer this question.

Information about government science policy measures was measured by the following questions (Table 3).

**Table 3: Familiarity with science policy measures (%)**

| | Yes |
|---|---|
| Have you heard that in 2019 the government separated the Research Institutes of the Hungarian Academy of Sciences from the HAS and placed them under a new research network? | 50.6 |
| Have you heard that the Central European University (CEU) has moved from Budapest to Vienna? | 63.9 |
| Have you heard that the Chinese Fudan University will open a campus in Budapest? | 80.7 |

Source: Author

At the time of the survey, the debate about Fudan University was currently taking place in the media, so a significant majority of respondents (80.7%) had heard about it. Fewer, but still the majority of respondents, remembered previous science policy measures, such as the Lex CEU (63.9%) and the Lex HAS (50.6%). Those who had heard about these measures were asked what they thought of them (Table 4).

5 There is a significant (Cramer's V= 0.582) correlation between ideological position and preference for change of government.

**Table 4: Agreement with science policy measures (%)**

| To what extent do you consider the measure to be beneficial or detrimental to Hungary? | Very or rather detrimental | Ambivalent | Very or rather beneficial | Don't know/ Don't answer |
|---|---|---|---|---|
| Lex MTA | 54.8 | 19.4 | 19.6 | 6.1 |
| Lex CEU | 55.7 | 21.2 | 17.7 | 5.5 |
| Fudan University | 48.5 | 22.6 | 22.9 | 5.9 |

Source: Author

Among those who had heard about these government measures, far more people considered them detrimental than beneficial. The percentage of those agreeing was slightly higher than 20 percent (22.9%) for Fudan University alone.

Attitudes towards science were assessed by agreeing with the following 12 statements (Table 5). Respondents were given the statements in random order. Table 5 presents the statements in order of percentage of agreement.

**Table 5: Attitudes towards science. How much do you agree with the following statements? (%)**

| | Strongly or somewhat disagree | Ambivalent | Strongly or somewhat agree | N/A |
|---|---|---|---|---|
| Having excellent Hungarian scientists is an important part of our national pride. | 2.4 | 5.0 | 91.1 | 1.5 |
| Scientific researchers should be better endowed financially. | 1.8 | 7.2 | 87.4 | 3.5 |
| It is important that Hungarian scientists do not go abroad, but stay and work in Hungary. | 4.0 | 8.5 | 86.5 | 1.1 |
| Politicians should listen more to scientists when making decisions. | 3.9 | 11.6 | 82.9 | 1.6 |
| The results of scientific research should have some material benefit. | 5.8 | 14.7 | 77.2 | 2.2 |
| Politics should not interfere in scientific matters. | 8.0 | 14.3 | 75.9 | 1.8 |
| Different disciplines are equally useful. | 8.0 | 14.4 | 74.8 | 2.8 |
| You can trust what scientists say. | 6.1 | 26.9 | 65.0 | 2.0 |
| It should be up to scientists themselves to decide what scientific research should be funded by the state. | 12.3 | 29.5 | 54.9 | 3.4 |
| The state should only fund scientific research that is economically viable. | 30.1 | 24.3 | 43.7 | 1.9 |

| | Strongly or somewhat disagree | Ambivalent | Strongly or somewhat agree | N/A |
|---|---|---|---|---|
| Natural science is more useful than social science or humanities. | 28.3 | 29.0 | 37.4 | 2.8 |
| Hungary is too small a country to try to achieve great scientific results on its own. | 57.6 | 16.7 | 24.0 | 1.7 |

Source: Author

The first seven items were not proved to be divisive. These could be called 'pro-science' statements, with which the majority of respondents agreed. They are proud of our excellent scientists who should be better endowed and kept in Hungary, politicians should listen to them but not interfere in scientific matters, and different disciplines are equally useful but they should have material utility. There were two statements – scientists can be trusted and scientists themselves should be able to decide how science is funded – for which a larger proportion of respondents chose the middle of the scale. The last three statements – that the state should only fund research that is economically viable, that natural science is more useful than others, that Hungary is too small to achieve great scientific results – were much less pro-science and were agreed with by a minority of respondents.

## *The latent structure of attitudes towards science*

In order to identify the factors that influence respondents' attitudes towards science, we first searched for a latent structure behind the attitude variables using factor analysis (maximum likelihood method). Our final 2-factor model included 10 statements (Table 6).

Our first factor is a general pro/anti science attitude consisting of seven variables. A respondent scoring high on this factor trusts scientists, is proud of them, would make them stay in Hungary, endowed them more and considers all sciences equally important. In addition, according to this factor, science is clearly superior to politics: politicians should not interfere in scientific matters, but should listen more to scientists when making decisions.

The second factor consists of three variables and shows how much the respondent agrees with the utilitarian conception of science, and is therefore called utilitarian attitude. A respondent scoring high on this factor agrees that natural science is more useful than other disciplines, that the state should only fund research that is economically viable and that Hungary is too small a country to try to achieve great scientific results on its own.

**Table 6: Rotated factor matrix of attitudes towards science, KMO = .745**

| | Factors | |
|---|---|---|
| | General pro-science attitude | Utilitarian attitude |
| Politics should not interfere in scientific matters. | **.528** | -.108 |
| Politicians should listen more to scientists when making decisions. | **.652** | .008 |
| Different disciplines are equally useful. | **.510** | -.025 |
| You can trust what scientists say. | **.431** | .075 |
| It is important that Hungarian scientists do not go abroad, but stay and work in Hungary. | **.482** | .167 |
| Having excellent Hungarian scientists is an important part of our national pride. | **.485** | .107 |
| Scientific researchers should be better endowed financially. | **.416** | .050 |
| The state should only fund scientific research that is economically viable. | .120 | **.610** |
| Hungary is too small a country to try to achieve great scientific results on its own. | -.028 | **.455** |
| Natural science is more useful than social science or humanities. | .049 | **.542** |

Source: Author

## *Regression models*

Once these two factors were identified, regression models were built to explain the factors. In the first model, we explained general pro-science attitude factor using political preferences and socio-demographic control variables (Table 7).[6]

The factor of general pro-science attitude was only correlated with year of birth among the socio-demographic control variables (gender, year of birth, place of residence, education). The older the respondent, the more likely they were to hold a pro-science attitude, although the effect was very weak. Of our political explanatory variables, party preference, measured by the desire for a change of government did not prove to be a significant explanatory variable. Ideological position, however, mattered: those who identified themselves as right-wing were less pro-science compared to those who identified themselves in the centrum. Among the information variables, familiarity with the Fudan University issue also showed a positive correlation with pro-science attitude.

6 The regression models did not include agreement of science policy measures, only the familiarity with them. This allowed us to measure how well informed respondents were about science policy issues. It would also have been interesting to examine agreement of measures in the context of ideological position and partisan divisions, but including these variables would have severely reduced the number of respondents we could include in the regression analysis. Therefore in the end these variables were not used in the multivariate analysis.

**Table 7: Linear regression model,[7] dependent variable: General pro-science attitude**

| | B | Std. Error | Beta | t | sig |
|---|---|---|---|---|---|
| *Constant* | 15.786 | 4.067 | | 3.882 | .000 |
| Gender | .124 | .063 | .073 | 1.964 | .050 |
| Year of birth | -.008*** | .002 | -.169 | -4.083 | **.000** |
| Place of residence (reference category: village) | | | | | |
| Budapest | .021 | .096 | .010 | .225 | .822 |
| City | .126 | .091 | .058 | 1.379 | .168 |
| Town | .129 | .079 | .071 | 1.643 | .101 |
| Education level (reference category: elementary school) | | | | | |
| Vocational school | .187 | .106 | .095 | 1.766 | .078 |
| High school | .192 | .104 | .110 | 1.842 | .066 |
| Tertiary education | .041 | .116 | .020 | .351 | .726 |
| Pro-government voter | .043 | .078 | .025 | .549 | .583 |
| Left-right scale (reference category: centrum) | | | | | |
| Left-wing | -.005 | .089 | -.002 | -.055 | .957 |
| Right-wing | -.278** | .082 | -.156 | -3.404 | **.001** |
| Heard about: HAS | .060 | .073 | .035 | .815 | .416 |
| Heard about: CEU | .036 | .077 | .020 | .467 | .641 |
| Heard about: Fudan University | .270** | .093 | .123 | 2.902 | **.004** |

Source: Author. ****p>0.001, **p>0.01, *p>0.05*

However, the explanatory power of the model as a whole was weak (Nagelkerke $R^3$=.089). This is not really surprising, given that most of the statements included in the general pro/anti science attitude factor were not particularly divisive, so the variance of the factor was low.

As a next step, we build a linear regression model to explain the other utilitarian perception of science factor (Table 8)

The explanatory power of this second regression model explaining the utilitarian attitude factor is much more acceptable (Nagelkerke $R^3$=.262). Several of both the control and explanatory variables show significant correlations with the dependent variable. The effect of age (year of birth) is similar in strength and direction as in the previous model: the older the respondent, the more likely they are to agree with the utilitarian conception of science. Education, on the other hand, shows a negative correlation: the utilitarian attitude is mainly held by less educated respondents.

7 There is no confounding multicollinearity between the independent variables. The multicollinearity VIF test values are given in the Appendix.

**Table 8: Linear regression model,[8] independent variable: Utilitarian attitude**

| | B | Std. Error | Beta | t | sig |
|---|---|---|---|---|---|
| *Constant* | 23.314 | 3.254 | | 7.164 | .000 |
| Gender | -.074 | .051 | -.049 | -1.466 | .143 |
| Year of birth | -.012*** | .002 | -.267 | -7.168 | **.000** |
| Place of residence (reference category: village) | | | | | |
| Budapest | -.110 | .076 | -.056 | -1.436 | .151 |
| City | .036 | .073 | .019 | .491 | .623 |
| Town | .012 | .063 | .007 | .184 | .854 |
| Education level (reference category: elementary school) | | | | | |
| Vocational school | -.225** | .085 | -.128 | -2.655 | **.008** |
| High school | -.308*** | .084 | -.198 | -3.685 | **.000** |
| Tertiary education | -.604*** | .093 | -.328 | -6.510 | **.000** |
| Pro-government voter | .184** | .062 | .121 | 2.955 | **.003** |
| Left-right scale (reference category: centrum) | | | | | |
| Left-wing | -.001 | .071 | -.001 | -.021 | .983 |
| Right-wing | .102 | .065 | .064 | 1.562 | .119 |
| Heard about: HAS | -.204*** | .059 | -.134 | -3.475 | **.001** |
| Heard about: CEU | -.110 | .061 | -.068 | -1.793 | .073 |
| Heard about: Fudan University | .038 | .075 | .020 | .513 | .608 |

Source: Author. ****p>0.001, **p>0.01, *p>0.05*

The political explanatory variables paint a significantly different picture than in the previous model. The effect of the ideological position (right-left scale) is replaced by the effect of the party preference: those who would not change government are more in agreement with the utilitarian conception of science. Among the variables measuring familiarity of science policy measures, in this model it is not the familiarity with the Fudan University issue but the familiarity with the HAS research network issue that shows a significant negative correlation with the utilitarianism factor as dependent variable.

## Conclusion

We consider the most important result of our research that we have been able to investigate the relationship between attitudes towards science and political bias in Hungary in a more detailed way than before. The factor analysis revealed two dimensions of attitudes: the dimension measuring the utilitarian/

8 There is no confounding multicollinearity between the independent variables. The multicollinearity VIF test values are given in the Appendix.

non-utilitarian perception of science was clearly distinguished from the more general pro-science/anti-science axis.

In terms of testing our hypothesis about political bias, when we disaggregated attitudes towards science into several dimensions, we found significant differences. Our hypothesis was thus partially confirmed.

Regarding the general pro-science attitude, our results were partially similar to those of Farkas and co-authors (Farkas et al. 2022), although their examination was carried along the conservative-liberal axis, whereas in the present study we used the left-right axis. The difference between the two studies, however, is that in our data only ideological position, and not party preference, determined the attitudes towards science. This is probably due to our more detailed attitude questions, which included many statements on which voters of different political parties do not take different positions. In the present study, general pro-science attitude was not a divisive issue (Stokes 1992).

In contrast, utilitarian attitude on science has proved to be more of a position issue. Accordingly, our regression model, including political variables, was found to have much higher explanatory power compared to the low-variance general pro-science attitude. Indeed, in contrast to pro-science attitude, in the case of utilitarianism, it was not ideological position but the pro-government/opposition dichotomy that had significant effect, as originally hypothesised. However, it should be noted that, in addition to partisan bias, the higher explanatory power of the model was also due to the fact that more educated and less educated people seem to think differently about science along this attitude dimension. While trust in science, pride and appreciation of Hungarian scientists were typical of respondents at all levels of education, less educated respondents also had a more utilitarian approach to science.

Returning to the core question of partisan bias, pro-government respondents had a more utilitarian view of the role of science than those in opposition. While we cannot, of course, conclude from the analysis presented in this paper whether we can indeed see the effect of political discourse on these results, our hypothesis is strengthened by the fact that familiarity with the case of the Hungarian Academy of Sciences also had a significant effect in the model explaining utilitarianism. The majority of respondents who had heard about the annexation of research institutes from the HAS, disagreed with this measure and rejected the utilitarian argument in their attitudes towards science that otherwise echoed the government position.

The partisan bias thus concerns those elements of perceptions of science that have been foregrounded in government action and discourse. While in other dimensions of attitudes towards science, the science scepticism of right-wing respondents, often observed worldwide, prevails in Hungary as well.

According to our results, partisan bias can be dangerous for the reputation of science. Strategies to bridge politically motivated differences in attitudes

towards science might include several measures. A set of proposals developed in the context of the COVID epidemic[9] suggests that it is better to communicate science-related information by well-known experts rather than politicians. However, they could also be supported by celebrities, as they are more relatable to the general public than scientists.

It is also important to fight against fake news and conspiracy theories, but certainly not by treating the representatives of pseudoscience as equal debating partners for scientists in the mainstream media (Szabados 2019). Scientific communication should be accessible and science communicators themselves should avoid ideologically distorted arguments that make it difficult to cross partisan lines. For the same reason, the anti-science label should be used with caution in the context of any political action, emphasising instead the existence of a scientific consensus on a specific scientific issue.

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## Appendix

### Multicollinearity statistics of linear regression models

| | General pro/anti science attitude | | Utilitarian attitude | |
|---|---|---|---|---|
| | Tolerance | VIF | Tolerance | VIF |
| *Constant* | | | | |
| Gender | .935 | 1.070 | .935 | 1.070 |
| Year of birth | .749 | 1.336 | .749 | 1.336 |
| Place of residence (reference category: village) | | | | |
| Budapest | .693 | 1.443 | .693 | 1.443 |
| City | .724 | 1.381 | .724 | 1.381 |
| Town | .681 | 1.469 | .681 | 1.469 |
| Education level (reference category: elementary school) | | | | |
| Vocational school | .445 | 2.250 | .445 | 2.250 |
| High school | .357 | 2.797 | .357 | 2.797 |
| Tertiary education | .408 | 2.452 | .408 | 2.452 |
| Pro-government voter | .618 | 1.619 | .618 | 1.619 |
| Left-right scale (reference category: centrum) | | | | |
| Left-wing | .779 | 1.283 | .779 | 1.283 |
| Right-wing | .610 | 1.640 | .610 | 1.640 |
| Heard about: HAS | .698 | 1.433 | .698 | 1.433 |
| Heard about: CEU | .724 | 1.381 | .724 | 1.381 |
| Heard about: Fudan University | .707 | 1.414 | .707 | 1.414 |

Source: Author

# BOOK REVIEW

# The Future of Geography: How Power and Politics in Space Will Change Our World

REZA JAMALI

sciendo

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In 'The Future of Geography: How Power and Politics in Space Will Change Our World' Tim Marshall offers a futuristic perspective on the geopolitics of space for the coming five decades.

This perspective explores the competition between nations and private companies for control over power and access to the collective future of humanity. Renowned for his comprehensive style in earlier publications such as 'Prisoners of Geography' and 'The Power of Geography', Marshall provides valuable perspectives and commentary on the potential risks of astropolitics, skilfully guiding readers through the unknown territory of space.

The book is structured with a high level of effectiveness, starting by acknowledging the contributions of scientists and thinkers who have propelled humanity in space exploration. Marshall then evaluates the progress and ambitions of the three major superpowers – the USA, Russia and China. Finally, he explores the potential landscape of tomorrow's world, highlighting the race among private companies and entrepreneurs to leave their mark on history.

The book begins with a brief introduction (Marshall 2023, 12) that sets up a journey that exceeds the limits of earthly boundaries. Chapter one, titled 'Looking Up' (ibid.: 18) invites people to think about the deep ideas behind going into space. Recognising that 'space has shaped human life from our very beginning' (ibid.: 12), Marshall traces humanity's fascination with the stars, spanning from hunter-gatherer tribes to civilisations such as the Babylonians, Sumerians, Greeks, Romans and the Golden Age of Islam. He carefully follows the evolution of scientific exploration through the milestones set by figures like Copernicus, Giordano Bruno, Galileo Galilei, Newton and Einstein. Marshall emphasises the surprising accuracy of past knowledge in measuring the Earth and its celestial position.

Eratosthenes of Cyrene becomes a main point, with Marshall noting that over 2,000 years ago, Eratosthenes concluded, without today's advanced equipment, that 'Earth's circumference was between 40,250 and 45,900 kilometres. The actual circumference is now usually accepted as 40,096 kilometres' (ibid.: 24). Marshall discusses how the human drive to explore the cosmos has been a significant force, stating, 'Much of human endeavour has been driven by our desire to reach for the stars' (ibid.: 20). He emphasises that recent decades have brought humanity to the brink of exciting new discoveries, noting, 'and the desire to find out, to know more – and even to go there ourselves – has proved irresistible' (ibid.: 34).

Marshall cautions against carrying current political conflicts into space, urging that the mistakes of the past should not be repeated. He stresses that venturing into space is a venture for all of humanity and should not be monopolised by a single entity or a shaky coalition of organisations. Marshall warns of the potential for competition and conflict in the new arena of space if a unified approach is not adopted: 'If we cannot find a way to move forward as one unified planet, there is an inevitable outcome; competition and possibly conflict played out in the new arena of space' (ibid.: 16).

In chapter two, 'The Road to the Heavens' (ibid.: 35), this book tells us about Yuri Gagarin's amazing journey into space. It shows how beautiful our planet looks from far away and captures all of these eager adventures we take into outer space. Quoting the Russian scientist Tsiolkovsky, Marshall echoes the sentiment that 'Earth is the cradle of humanity, but one cannot stay in the cradle forever' (ibid.: 40). Marshall precisely explores the post–World War II decades when humanity took its initial steps into space, highlighting the role of conflict on Earth, particularly the Cold War arms race, in propelling space exploration. He acknowledges the historical 'firsts' achieved by the Russians, causing consternation among the Americans. Marshall notes Russia's precedence in reaching the Moon, even if it involved a 'hard landing'. He points out, 'Then, later in 1959, the Soviets had a hit, literally, when Luna 2 became the first spacecraft to reach the surface of the Moon' (ibid.: 45).

Reflecting on the Space Race of the 1960s, the author observes that the fervour waned after the successful Apollo 11 mission. He emphasises the global collaboration that enabled Neil Armstrong's iconic step on the Moon, acknowledging the contributions of notable figures throughout history: 'Armstrong is a colossal figure, but he knew he stood on the shoulders of giants such as Gagarin and Tsiolkovsky, Goddard, Oberth, Korolev, von Braun and, before them, the great scientists down the ages' (ibid.: 52).

In this chapter, Marshall expresses a somewhat nostalgic sentiment, suggesting that the late 1960s might have been a key moment that could have significantly fueled space exploration worldwide. While he acknowledges the reasons for the conclusion of the Space Race, attributing it to budget constraints and

political pressures, he also recognises the enduring fascination humanity has with the Moon. He states, 'It's estimated that about 110 billion humans have walked on the surface of Earth. Almost all of them will have gazed at the Moon in wonder' (ibid.: 57). With over 50 years having passed since humans last walked on the Moon, Marshall poses the question of whether it is now the opportune time to return. He notes, 'Apollo 17 was the last, leaving on 14 December 1972, and since then no one has been back' (ibid.: 56).

In the main part called 'Right Here, Right Now' (ibid.: 58–189), the author takes readers on a trip through astropolitics time. In chapter three, 'The Era of Astropolitics' (ibid.: 59), he changes perspectives from single countries to whole continents finally looking at all of Earth united together. Marshall intriguingly explores the motivations for countries and 'space superpowers' to revisit the Moon and sustain space activities. Drawing parallels between space geography and Earth geography, he emphasises that controlling access allows one to wield power. He states, 'If a space superpower could dominate the exit points from Earth and the routes out from the atmosphere, it could prevent other nations from engaging in space travel. And if it dominates low Earth orbit, it could command the satellite belt and use it to control the world' (ibid.: 76).

Low Earth Orbit, ranging from 160 km to 2000 km, holds significance due to satellite engagement, establishing it as a crucial location. Referring to it as a potential 'choke point', Marshall notes, 'Strategically, low Earth orbit is a potential 'choke point'" (ibid.: 67). The attractiveness of this orbital space is underscored by the fact that it accommodates the majority of satellites, as Marshall states, 'Low Earth orbit is an attractive piece of real estate because that's where most satellites operate' (ibid.: 65). Additionally, Marshall identifies the five Lagrange points in our system as another tactically important area, describing them as 'advantageous positions to place satellites' (ibid.: 70). He observes that the expansion of space activities has led to a crowded low Earth orbit, with more than eighty countries placing satellites in space.

Regarding lunar exploration, the author suggests that future visits may focus on polar exploration, driven by the motivation to mine resources, particularly helium-3. He points out, 'Many countries have the incentive to go after them [metal oxides], especially those that don't want to rely on China, which currently holds a third of the world's known reserves' (ibid.: 72). Marshall's book underscores the necessity of understanding geopolitics and 'astropolitics' in space as human expansion continues. He challenges the perception that space is merely a future endeavour, stating, 'Many of us still think of space as "out there" and "in the future". But it's here and now – the border into the great beyond is well within our reach' (ibid.: 61). However, Marshall raises concerns about a crucial gap in the enforcement of space activities, noting that existing 'laws' were written for a different time and are insufficient for the current technological and geopolitical landscape. He emphasises, 'The "laws" we currently have

for activity in space are little better than guidelines. Technology and changing geopolitical realities have overtaken them. With an increasing number of space-based platforms for military and civilian uses-space is becoming a congested twenty-first-century environment requiring twenty-first-century laws and agreements' (ibid.: 77).

It's essential to highlight that Marshall's portrayal is not pessimistic. He consistently advocates for global cooperation as the crucial method and means to ensure positive progress in space exploration. As he emphasises, 'The ISS is a symbol of what can be achieved in space through cooperation' (ibid.: 64). Marshall expresses concern that without global cooperation, there is a risk of 'fighting over the geography of space, just as we have done over the geography of Earth' (ibid.: 78).

In chapter four, 'Outlaws' (ibid.: 79), it is shown how unimportant Earth politics can seem when seen from the Moon. The idea comes from what Apollo 14 astronaut Edgar Mitchell said about this topic. Chapters five, six and seven talk about China's goals to explore space. They also discuss the return of America and Russia looking back at past events with special quotes that make you think. Marshall underscores the outdated nature of current 'space laws', asserting that they belong to a different era. He specifically mentions the 'Outer Space Treaty (1967)', 'The Moon Agreement (1979)' and 'The Artemis Accords (2020)', concluding that 'Existing space laws are horribly out of date and too vague for current conditions' (ibid.: 81). The legal frameworks and agreements currently in place rely on countries signing up to them, and some definitions are too loose and unclear to be effective.

The possibility of non-countries, represented by private enterprises like Musk's SpaceX, competing for 'space rights' wasn't envisaged when these laws were formulated. Marshall raises questions about the regulation of Musk's space activities, emphasising the challenges of enforcing laws and agreements in the vastness of space. He notes, 'Laws and agreements are difficult enough on Earth, where there are clear boundaries and borders, and established precedents. What's more, in space, it's not in the interests of the big powers to give up their advantage' (ibid.: 81). To underscore this point, Marshall delves into hypothetical scenarios that require pre-emptive addressing rather than a reactionary response after they occur. He raises questions about the applicability and enforcement of Earth's laws on corporate and private enterprises in space, emphasising the serious and significant nature of the issue. Marshall asserts, 'Technology has outpaced the law. Without laws, geopolitics—and now astropolitics—is a jungle' (ibid.: 89).

There are also urgent matters necessitating international cooperation, such as the potential risks posed by solar flares, asteroids and space debris. The author notes, 'There are other, more immediately pressing issues that also require international collaboration. A big one is space debris' (ibid.: 92). Sangeetha

Abdu Jyothi's statement from the University of California is quoted in the book, asserting, 'To the best of my knowledge, there are no global agreements or plans to deal with a large-scale solar storm' (ibid.: 99). The recent DART (Double Asteroid Redirection Test) development, which spent $ 325 million to alter the orbit of another planetary object, is seen as a momentous success and a cost--effective measure for the 8 billion inhabitants of planet Earth.

Marshall dedicates individual chapters to each of the Big 3 space superpowers – China, the USA and Russia – highlighting their notable achievements and aspirations in space activity. He mentions, 'In 2019, the uncrewed Chang'e 4 became the first spacecraft to land on the far side of the moon' (ibid.: 112). In what has become an expected symbolic tradition, he notes that it 'planted the Chinese flag on the surface and began digging for rocks in a region it is considering using as a base' (ibid.: 119). The USA, in contrast, has plans to construct a 'Lunar Gateway Space Station' near the Moon. Russia is working on a new system called 'Kalina', which could deploy laser beams to dazzle or 'blind' other orbiting satellites, actions reminiscent of those seen in a James Bond movie.

Chapter eight, 'Fellow Travelers' (ibid.: 162), summarises Marshall McLuhan's thoughts very touchingly. It emphasises the role we all play as crew members on Earth-spaceship together. An increasing number of countries and companies are striving to establish themselves in the burgeoning realm of space exploration. According to the author, 'While China, the USA, and Russia are the three main players in space, many others are looking to increase their presence' (ibid.: 164). Notable figures like Jeff Bezos with 'Blue Origin', Richard Branson with 'Virgin Galactic' and Elon Musk with 'SpaceX', along with various countries including France, Germany, Japan, Australia, India, the UK, Israel, Iran and the UAE, are all competing for projects, partnerships and recognition in a crowded market. Unfortunately, this shift in perspective portrays space not as a hopeful frontier for the expansion of the species but as an opportunity for resource exploitation and abuse, suggesting that lessons from the past remain unlearned.

The last part, 'Future Past' (ibid.: 190–229), talks about space wars in chapter nine named 'Space Wars' (ibid.: 191). It uses Albert Einstein's ideas to remind us how big our universe is and the possible results of what people do. In chapter ten, 'Tomorrow's World' (ibid.: 210), the story takes us to the future. It gets its ideas from Lord Alfred Tennyson's view of our world. The author draws attention to the historical pattern of conflict accompanying human ventures into new domains, asserting, 'Each time humanity has ventured into a new domain it has brought war with it. Space is no different, and the potential battlefield is beginning to take shape' (ibid.: 193). Despite recognising the historical inclination toward conflict, the author expresses doubt that humanity will overcome its differences and collaborate in space for the equitable distribution of its riches, stating, 'Given all recorded human history, it is unlikely that we will recognize our common humanity and work together in space to harvest its riches and then

distribute them equally' (ibid.: 228). Simultaneously, the author acknowledges the inevitability of humanity's continued exploration of space, asserting, 'Humanity has not gone so far only to stand still now' (ibid.: 212).

Looking ahead to the mid-2030s, a mere 15 years from the present, the author envisions the possibility of the first human landing on Mars, prompting contemplation about the global viewership of such a unifying event. Reflecting on the historic Moon landing in 1969, the author questions the message humanity will leave in the stars, wondering about the language it will be in and whether it will acknowledge and reflect our shared humanity and vision or mirror our conflicting natures. The author emphasises the significance of the ongoing efforts in space, stating, 'We are now writing what will be history in space. We already have magnificent pioneers and amazing achievements. Where they went, and what they did, was incredibly hard' (ibid.: 212). The book concludes with a really insightful epilogue, featuring a quote from H. G. Wells: 'The past is the beginning of a beginning, and all that is and has been is but the twilight of the dawn' (ibid.: 229). This quote captures the idea that everything we've experienced and achieved is just the start of something new, emphasising the cyclical nature of time and the ongoing progress of humanity. It's a kind of reminder that each chapter in our history is a stepping stone to what comes next, like the dawn of a new day.

While contemplating humanity's exploration of new frontiers, the author observes, that whenever humankind entered a new area, it brought along inevitable conflict. This pattern continues in space, where the potential warfare is emerging (ibid.: 193). Drawing from our historical experiences, he holds the belief, 'it is unlikely that we will recognize our common humanity and work together in space to harvest its riches and then distribute them equally' (ibid.: 228). Simultaneously, he accepts the inexorable progression of our explorations into space (ibid.: 212).

Marshall's skilful storytelling, rooted in historical context and enriched with insightful commentary, provides readers with a clear understanding of humanity's past, present and potential future in space. The book's relevance lies in its ability to navigate complex geopolitical landscapes, uncovering the changing dynamics as nations and private companies compete for dominance beyond Earth. From acknowledging historical contributors to space exploration to painting a picture of a crowded space race, the book navigates the complexities of astropolitics.

Marshall consistently emphasises the need for global cooperation as the key to ensuring a positive trajectory for space exploration. He expresses a genuine concern, stating that 'without this we may end up fighting over the geography of space, just as we have done over the geography of Earth' (ibid.: 77). Marshall's call for global cooperation resonates through his warnings about potential conflicts, offering a compelling perspective on humanity's cosmic journey.

This book is especially recommended for those seeking a holistic view of astropolitics, blending historical insights with futuristic visions. Whether you're a space enthusiast, geopolitice follower, or just curious about what lies beyond our planet, Marshall's clear and engaging writing style makes this book an insightful journey for a diverse range of readers.

**Marshall, T. (2023): *The Future of Geography: How Power and Politics in Space Will Change Our World*. London: Elliott and Thompson Limited.**