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ESSAYS

Why Should I Defend my Country? Psychological, Moral and Cultural Factors in the 'Willingness to Fight'

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Abstract: *The psychological willingness to fight for one's country has become an increasingly important issue in light of Russia's invasion of Ukraine on 24 February 2022 and the ongoing war near the eastern flank of Europe. This article presents three new analyses of the seventh wave of the recently completed World Values Survey that are designed to shed light on the features and factors that play a role in citizens' attitudes toward defending their own country. Our goal was to find individual and societal characteristics that may help to explain variation in willingness to fight globally, as well as between and within two countries on the eastern flank that we use as case studies: the Czech Republic and Slovakia. In the conclusion, we explore some of the limitations of these studies, as well as some of their most important implications. Before reporting on and discussing our findings, we set the context for the rationale for our selection of material and methodology by briefly describing some of the relevant literature on the willingness to fight for one's country.*

Key words: ***willingness to fight, personality factors, moral foundations, World Values Survey***

Introduction

Earlier research has shown that the psychological willingness to fight to defend one's own country has been decreasing globally over the last few decades, a trend to which Eastern Europe is not an exception (Puranen 2014; Inglehart, Puranen & Welzel 2015). While attention to this waning willingness may not

have seemed urgent during peacetime, the military invasion of Ukraine by Russia on 24 February 2022 provided a jolt to wake Europe from its pre-war slumbers. Interest in the battle readiness of citizens and governments in the 'eastern flank' (and especially the Baltics and the Visegrad Group) has been suddenly renewed. The political, diplomatic and military need for knowledge about such readiness is obvious, but there has been relatively little academic research on the correlations, causes and consequences of the dwindling willingness to fight for one's own country in Eastern Europe (see literature review below). Understanding and facilitating the dynamics that could lead to an increase in social cohesion of a sort that could bolster a willingness to defend will require analyses that account for a wide range of psychological and sociological dimensions (Lane & Shults 2023).

A cautionary tale for all defence planners and analysts is the recent Defense Intelligence Agency's development of comprehensive 'will to fight' analytical methodologies. It gained unprecedented attention within the US intelligence community following the stark miscalculations regarding Ukraine's defensive capabilities in early 2022. Lieutenant General Jeffrey Kruse, director of the Defense Intelligence Agency, acknowledged this critical intelligence failure during a November 2024 address to the Intelligence and National Security Alliance: 'The Ukrainians exhibited a will to fight that was far beyond anything any of us had estimated'. This miscalculation, where US analysts predicted Kyiv would fall within three days, represented a fundamental failure to properly assess intangible human factors that ultimately proved decisive in military outcomes. It also demonstrates this concept's strategic importance (Ferran 2024).

It is in the interest of any country to inspire enough loyalty so there exists a group of its members willing to fight and die for it. Individuals with that level of commitment are also generally willing to perform lesser sacrifices for the country – e.g. spend their time, effort and resources for the good of their country. In contemporary Europe, army personnel and members of uniformed volunteer organisations are thus often used for different types of disaster response more often than for fighting itself. Across the eastern flank of Europe during the COVID-19 crisis, these groups helped coordinate the government responses to the pandemic. In Slovakia, for example, 95% of soldiers were busy managing the logistics of that crisis in 2021, leaving the country in a fragile position if another crisis (or war) had occurred (Vitko 2021). Only a country with high enough social cohesion and collective identity has enough individuals willing to sacrifice for it so it can manage large scale crises such as COVID, poly-crises or a war on a scale such that Ukraine is facing today. Such countries are safe not only because they have more people willing to fight for it, but more people generally willing to sacrifice their time and effort for the collective good.

In this context we follow the definition of social cohesion utilised by the Social Cohesion Radar (SCR) sociometric instrument, developed for the European

Commission by Bertelsmann Stiftung and Jacobs University (today rebranded as Constructor university) in Bremen (Dragolov 2013). This instrument is especially relevant for our study, since it was inspired by the World Value Survey and European Values Study design and is thus compatible methods-wise with the WVS datasets our study is based on. Social cohesion is understood as the quality of social cooperation and togetherness in a territorially delimited community. The SCR breaks down the concept of social cohesion into three domains – social relations, connectedness and focus on the common good. Each of these domains comprises three measurable dimensions: social networks, trust in people, acceptance of diversity, identification, trust in institutions, perception of fairness, solidarity and helpfulness, respect for social rules and civic participation. This bond with one's country and wider community, this willingness to follow the general idea of the common good translates not only into physical safety but also into other areas of solidarity with the wider community such as willingness to pay taxes and participation in the shadow (untaxed) economy, lower corruption, lower instability (susceptibility and hybrid threats) and the ability to muster a solid force for natural disaster response (COVID, floods, winter calamities).

This article presents three new analyses of the seventh wave of the World Values Survey that are designed to shed light on the features and factors that play a role in citizens' attitudes toward defending their own country. Our goal was to find individual and societal characteristics that may help to explain variation in 'willingness to fight' (WtF) globally, as well as between and within two countries on the eastern flank that we use as case studies: the Czech Republic and Slovakia. In the conclusion, we explore some of the limitations of these studies, as well as some of their most important implications. Before reporting on and discussing our findings, we set the context for the rationale for our selection of material and methodology by briefly describing some of the relevant literature on the willingness to fight for one's country.

Literature review

One of the earliest academic treatments of WtF was a 1986 article based on data derived from the 1981–82 International Values Study, sponsored by the European Values Systems Study Group, which informed what became the World Values Survey (WVS) and the European Values Study (EVS). Analysing the responses of participants in 14 nations to the question 'Of course, we all hope that there will not be another war, but if it were to come to that would you be willing to fight for your country?', Listhaug found a number of relevant individual and societal variations (Listhaug, 1986). For example, women were far more reluctant than men to risk their lives for their own country. Levels of WtF were quite high in Hungary, Norway and Sweden, but far lower in Italy and West Germany. Listhaug hypothesised that the low willingness in the latter countries was shaped in part

by their experience of defeat in World War II, a hypothesis that found further confirmation in later studies (Bobowik et al. 2014).

Post-communist societies such as the Czech Republic and Slovakia experienced unique identity transformations that fundamentally altered their relationship with defence and military service. The communist regime fabricated idealised images of the 'socialist man' while simultaneously demobilising genuine civic engagement, creating what scholars term the 'post-communist syndrome' characterised by political passivity and ambivalent democratic values (Klicperová, Feierabend & Hofstetter 1997). This legacy manifests in problematic patterns where pro-democratic citizens remain politically passive while those who are politically mobilised often lack strong democratic commitments – a reversal of patterns found in established democracies. The transition from mandatory military service under communist regimes to professional armies occurred without adequate public discourse about defence responsibilities, leaving citizens psychologically detached from NATO membership despite formal accession. Research demonstrates that post-communist citizens display significant 'participatory deficits' and weaker support for democratic values compared to other democratising societies, with the middle class being pro-democratic but passive, while mobilised segments of the population exhibit questionable democratic commitments. There is no reason to expect that this passivity would not extend to the WtF.

Recent advances in identity fusion theory provide crucial insights missing from traditional willingness to fight research. Identity fusion – characterised by porous boundaries between personal and group identity – represents a more powerful predictor of extreme pro-group behaviour than conventional social identification measures (Swann et al. 2012; Gómez et al. 2019). Strongly fused individuals experience 'identity synergy' where personal agency channels directly into group-protective behaviours, explaining why attacks on the group are perceived as personal attacks requiring defensive response (Swann Jr, Klein & Gómez 2024). This theoretical framework helps explain why Ukrainian resistance exceeded material predictions – high identity fusion with national values created willingness to fight that transcended economic calculations. Identity fusion emerges from shared transformative experiences and perceived group formidability, suggesting that post-communist countries' declining willingness to fight may reflect weak identity fusion with democratic institutions rather than purely economic factors (Whitehouse et al. 2014). For the Czech Republic and Slovakia, the absence of shared transformative experiences linking personal identity to democratic defence institutions may explain declining WtF trends even more effectively than economic prosperity.

Contemporary WtF research rarely addresses the impact of sophisticated disinformation campaigns targeting democratic institutions and NATO solidarity. Russian information warfare in the Czech Republic and Slovakia intensified

after 2014, utilising local collaborators and alternative media to spread anti-Western narratives and weaken defence commitments (Rechtik and Mareš 2021; Wenzel et al. 2024). These campaigns exploit existing democratic deficits in post-communist societies, where citizens already exhibit lower institutional trust and civic engagement than established democracies (Howard 2003), especially in Slovakia, which has the weakest Western identity of the whole NATO eastern flank. Pro-Russian messaging amplifies narratives portraying the United States as a greater threat than Russia, despite Russia's invasion of neighbouring Ukraine – a cognitive distortion that directly undermines defence willingness. The effectiveness of these campaigns reflects deeper cultural vulnerabilities rooted in post-communist political socialisation patterns, where critical media literacy and democratic civic education remain underdeveloped. Understanding declining WtF in eastern Europe requires analysing how information warfare exploits post-communist legacies to weaken democratic defence culture, since it strongly complements the natural attitude changes that are consequences of prosperity and peace, which is the current dominant explanation of declining WtF in Western Europe.

The 1990s and 2000s saw several studies that incorporated variables of different sorts that were more or less related to the WVS WtF question. In an article on the decline of nationalisms, which included special attention to Eastern Europe's relatively short post-communist experience, Dogan identified willingness (or reluctance) to fight for one's country in time of war as one of the main indicators of nationalist trends (Dogan 1994). Lagos explored the role of 'willingness to defend democracy' in Latin American countries which, like countries on what is now the eastern flank of Europe, were relatively new democracies (Lagos 1997). Torgler utilised the first three waves of the WVS to explore the relationship between 'willingness to go to war' and variables such as national pride and trust (as well as demographic variables). As with earlier studies, Scandinavian countries expressed far more WtF than countries such as Italy, Germany and Japan (Torgler 2003).

In 2006, Cronberg noted that 'an attack on the EU's borders is considered highly unlikely [and] Russia is seen as a strategic partner, not an enemy', as the context for understanding the 'Nordic divide' between the Scandinavian countries and Finland. Key factors influencing WtF included the role of conscription, a sense of threat and territorial defence (Cronberg 2006). In 2010, the first five waves of the WVS (1985–2005) were included in an analysis of the relationship between various cultural differences and WtF, which identified national pride as a major predictor. Here too, a country's socio-political context and relatively recent experiences of war also played an important role (Díez-Nicolás 2010). Also in 2010, Anderson and Hirsch-Hoefler used the WVS and other datasets to test WtF cross-culturally and found that 'while lower income individuals' willingness to fight is insensitive to the distribution of income in society, richer individuals

are less willing to fight as the distribution of incomes becomes more unequal' (Anderson & Hirsch-Hoefler 2010). A more recent study by Paez incorporated data from both the WVS and the World History Survey (WHS) in order to study the relationship between WtF and social representations of history and cultural values in 40 nations. WtF was found to be positively correlated with low human development and low levels of cultural individualism (Páez et al. 2016).

The World Values Survey (WVS) and European Values Study (EVS) are the only sources that provide consistent, long-term and cross-national data on willingness to fight (WtF) across Europe and much of the world, thanks to their standardised approach and four decades of data collection. However, relying solely on these surveys has drawbacks: Using the same questions everywhere can overlook differences in how people from various cultures interpret ideas like 'fighting for your country', which might skew results, and it's important for researchers to recognise these limits and, where possible, use local or qualitative studies to add depth and context to the big-picture findings (Rutkauskas 2018; Bērziņa & Zupa 2021). We recognise these limitations, but we don't really have much choice. There are no real alternatives to the WVS/EVS for broad and long-term trends. The unique longitudinal architecture of the WVS, spanning four decades across more than 100 countries with standardised questioning on defence attitudes, creates what Norris and others acknowledge as an irreplaceable comparative infrastructure for cross-national values research. For indeed, as the methodological literature confirms, no other survey programme matches the WVS/EVS's comprehensive temporal-spatial coverage for values research (Luijkx et al. 2021).

One of the most theoretically rich, comprehensive and influential analyses of WtF appears in a 2015 article by Inglehart, Puranen and Welzel, who also analysed all five waves of the WVS (Inglehart, Puranen & Welzel 2015). These authors found that willingness to fight for one's own country in the event of war had fallen in 37 of the 41 countries examined. Why the decrease? One answer, which they called the 'Democratic Peace' thesis, attributed the absence of a major war since 1945 to the spread of democracy. What they call the 'Capitalist Peace' thesis, on the other hand, argues that peace is driven by the rise of trade and knowledge economies. Building on Welzel's earlier proposal (Welzel 2013) for an evolutionary theory of moral change driven by 'emancipation' of individuals into a context where they have more opportunities for self-realisation (associated with rising incomes, education and longevity), Inglehart et al. proposed a complementary 'Emancipatory Lifestyle' hypothesis: Rising existential security has rendered peace more desirable to individuals in most parts of the world such that 'readiness to sacrifice one's life gives way to an increasing insistence on living it, and living it the way one chooses' (Inglehart, Puranen & Welzel 2015: 418). In a single authored chapter, Puranen provided additional analyses that bolstered the claim that a main cause of dwindling WtF is people's experience

of better material conditions (including longer life expectancy and access to education and information) that provide them with a sense that threats to life are less relevant than opportunities to thrive (Puranen 2014).

The first six waves of the WVS were included in a cross-country analysis by Anderson et al. of the relationship between WtF, income and inequality. They found that country-level income inequality is negatively correlated with individual WtF, especially among the rich, who may find it more attractive under such conditions to 'buy themselves out' of military service (Anderson, Getmansky & Hirsch-Hoefler 2020). This latter study is one of the few to include analysis of the Czech Republic and Slovakia. WtF was low in all of the eastern flank countries, but Slovakia and the Czech Republic were the lowest. Using both multiple waves of the WVS and other datasets, Kim found that individuals in countries with more salient territorial threats involving intangible values were more likely to express WtF for their country (Kim 2020). Several more recent studies have focused on specific countries or regions such as Taiwan, in which national identity and collective action play a significant role (Wang & Eldemerdash 2023), and the Baltics, where factors such as conscription, societal resilience and attitudes toward NATO are important factors (Andžāns et al. 2021). The seventh wave of the WVS played a role in a 2023 article by Reznik that assessed the willingness of Ukrainians to fight for their country on the eve of the military invasion by Russia, and found that WtF was influenced by factors such as pro-Western orientation, regional affiliation and language behaviour (Reznik 2023).

This last paper brings us back more directly to the immediate concern of the current article, the status of the population's WtF on the eastern flank in response to the war in Ukraine and internal political and cultural shifts. As noted above, our special interest is in the Czech Republic and Slovakia. WtF has not been researched in depth in these two countries. However, as indicated in Table 1, such willingness has clearly decreased over the last decades.

Table 1: WtF in the Czech Republic and Slovakia over 4 waves of the WVS/EVS

	WVS 1990–94	WVS 1995–98	EVS 2017	WVS 2022
CZE	66.30%	43.90%	48.5%	34.4%
SK	65.50%	52.40%	38.1%	32.2%

Source: World Value Survey wave 2, World Value Survey wave 3, European Values Study 2017, and World Value Survey wave 7=Haerpfer et al. 2020

What has caused this dramatic decrease? No doubt the factors hypothesised in the research just surveyed contributed, including the change in values and living standard, and the 'democratic peace' that came to characterise Eastern Europe as a whole.

Moreover, like many other post-communist societies, citizens of the former Czechoslovakia had a suspicious attitude towards any security-related topics, since the security apparatus of the country – whether police, army, secret service or paramilitary units – was seen by many as an instrument of the oppression used by the government (Ntatzis 2023). Compulsory military service, which every citizen had an experience with directly or indirectly, had a bad reputation as well. It was seen by many as lost years of youth, spent in an environment that relatively openly supported bullying as a method of 'toughening up' young men (Tomek 2012: 30–4). These negative memories contributed to the lack of attention (or funds) given to the security apparatus in either country. Sociologically speaking, a career option in the police or in the army has been decreasing in prestige in the last 30 years in comparison with the communist era (pre-1989), which has hindered an influx of talent into these professions (Tuček 2016).

The reputation and public trust in the police and army has increased and stabilised over the years of professionalisation of the civil service over the 2000s and later, but it has never reached the height predating democratic transformation (Ntatzis 2023). Since the Czech Republic and Slovakia joined NATO, their military budgets have decreased and both societies have become more demilitarised, physically and mentally. All of this has damaged the historical military traditions of these countries, harming the natural patriotism and professional pride of the security forces. Without the latter, however, it is hard to maintain high morale and professionalism in the army. This is a significant challenge in times such as the Ukraine war, because it is professionals in the security forces that the population expects to be more willing to sacrifice themselves for society (Kosnáč & Gloss 2022). Our further analyses described and reported below are intended to shed further light on the decrease of WtF in Slovakia and the Czech Republic.

Material and methodology

Like several of those studies just described, the current research analyses data from the World Values Survey (WVS), in our case Wave 7 (Haerpfer *et al.* 2020). This is the largest wave so far and the first that cooperates with the European Values Survey (EVS), so that it covers more countries than ever. Since 1981, the WVS has explored people's values and beliefs and how they change over time. This is the longitudinal dataset that confirms that the willingness of Czech and Slovak populations to defend their homeland has declined since the 1990s (Inglehart, Puranen & Welzel 2015). However, we are focusing only on Wave 7. Fieldwork for this survey round occurred from early 2017 to mid-2022. The Slovak and Czech data are quite recent (early 2022).

Above we saw that a wide variety of variables have been hypothesised as influencing willingness to fight for or defend one's country. These include gender, age,

religiosity, ethnicity, education, employment, national pride, recent historical experience and prevalence of conscription. The WVS presents an opportunity to analyse this data at different levels of analysis – global, regional and local – to better understand trends between nations and unpack with similarities and differences there may be. As suggested above, we 'zoom in' on Slovakia and the Czech Republic because of their shared history and cultural traits, as well as their differences.

Given the data of the World Values Survey, the dependent variable we are most interested in – 'willingness to fight' (WtF) – is captured in the following question from the WVS, Q151: 'Of course, we all hope that there will not be another war, but if it were to come to that, would you be willing to fight for your country?' The question must be answered 'yes' or 'no'.

The WVS dataset encompasses a total of 350 questions, spanning a wide array of socio-cultural and individual psychological dimensions, collected over several decades from countries across the globe. We hone in on a subset of questions for further investigation via 1) AutoML (Automated Machine Learning) methods to highlight key factors, and 2) theoretically driven hypotheses related to personality theory and the theory of moral foundations to pinpoint the most predictive factors of the willingness to fight. The two main hypotheses we test below are that

H1: *A subset of Big Five personality factors are predictive of willingness to fight (WtF).*

H2: *Moral signatures are predictive of willingness to fight (WtF).*

We focus on these topics here because they provide insights into the attitudes and beliefs most relevant to our research question.

In the ensuing sections, we employ a variety of statistical methods to dissect and interpret the complex web of socio-cultural and psychological determinants associated with the willingness to fight (WtF). Each analytical technique has been chosen to complement the data structure and to unveil the nuanced relationships within. This multipronged approach ensures robustness in our findings and allows for a comprehensive understanding of the underlying factors. Our analyses aim to unravel the intricacies of WtF by leveraging the rich and diverse data provided by the seventh wave of the World Values Survey.

In Analysis 1, we utilise AutoML in order to create an optimal model for understanding what best predicts the answers of people on Q151 on their WtF. Here, we set up our analysis as a classification task, rather than hypothesis testing, because we are most interested in whether their answer to the question is 'yes' or 'no'. We begin by using all data in Wave 7 of the WVS. We then follow this by running specific models on subsets of the data from the Czech Republic and Slovakia separately.

In Analysis 2, we wanted to zoom in on the Czech Republic and Slovakia as specific countries, as both of them are unique in having included a measure of personality, using the IPIP-20 scale to capture a measure from the Big Five personality factors. This allows us to test H1 mentioned above: that *a subset of Big Five personality factors are predictive of willingness to fight (WtF)*. Here, since we have a predefined set of hypothesised variables, we analyse the data as a logistic regression, where their answer to the WtF question is the independent variable, and the dependent variables are their calculated measures of each of the Big Five personality traits: openness, conscientiousness, extraversion, agreeableness and neuroticism.

Lastly, in Analysis 3, we dive more deeply into the Slovakia data, as that data offers an additional opportunity for further analysis because that country was the only one in which the Wave 7 data for the WVS included the moral foundations questionnaire. This provides us the ability to test H2 mentioned above: that *moral signatures are predictive of willingness to fight (WtF)*. As in the previous analysis, we use participants' answers to Q151 as the independent variable in a logistic regression, while utilising the calculated measures of the moral foundations theory as independent variables in the analysis.

Results and discussion

In this section, we present the results of each of the three analyses followed by a brief discussion. In the conclusion, we will return to a broader discussion of the relation between the studies and the limitations and implications of this research.

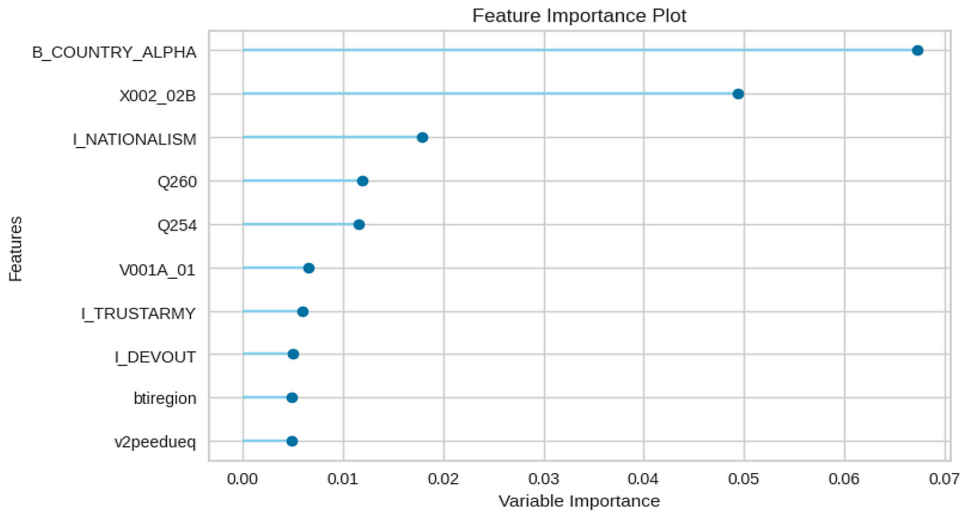
Analysis 1 – WVS features of 'Willingness to Fight' globally

AutoML of global data

The key results of the first analysis are displayed in Figure 1, which plots the importance of various features in the seventh wave of the WVS for all countries.

Our findings displayed in Figure 1 highlight the paramount importance of the country as a predictor of WtF, indicating a significant role of cultural context in shaping willingness to engage in national defence. This underscores the need for a deeper exploration of cultural factors, which we address in subsequent analyses. Another notable predictor is nationalism, along with trust in the military. Interestingly, trust in the military could influence willingness to enlist, whereas distrust might lead to involvement in paramilitary groups, as discussed in (Kosnáč et al. 2023).

Figure 1: Feature importance plot for WVS wave 7 (all countries)



Source: Compiled by authors based on Haerpfer et al 2022a

Codes for Figure 1:

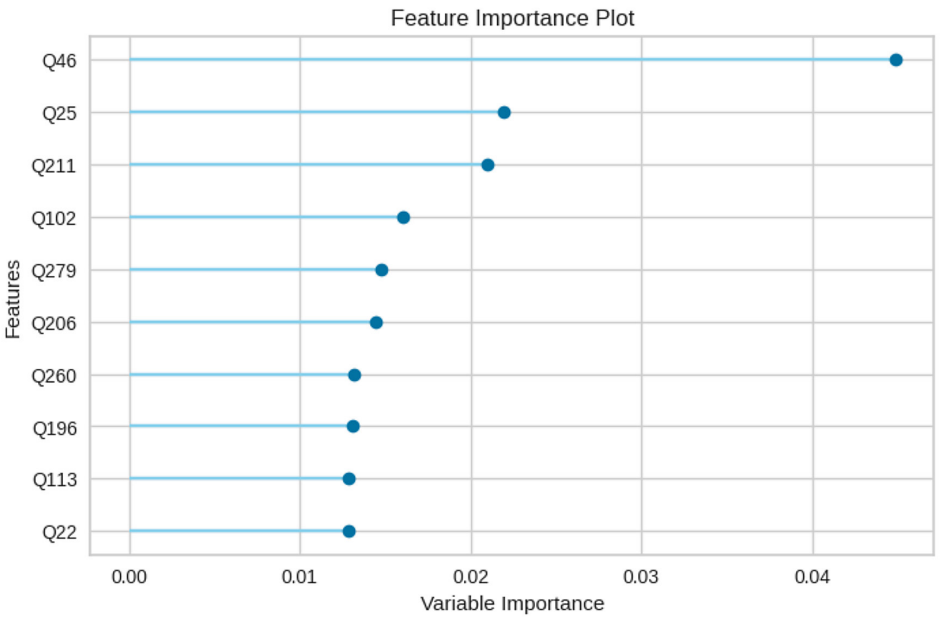
B_COUNTRY_ALPHA – The country from which the data was collected
X002_02B – Respondents Country of Birth
I_NATIONALISM – Welzel defiance – 2: Inverse national pride
Q260 – Sex
Q254 – National pride
V001A_01 – Father's country of birth
I_TRUSTARMY – Welzel scepticism – 1: Inverse trust in army
I_DEVOUT – Welzel defiance – 3: Inverse devoutness
Btiregion – BTI Region (7 categories) [Bertelsmann Stiftung, 2018]
V2peedueq – Educational Quality

Religious devotion also emerged as a key feature, alongside regional origins and country of birth (x002), which is expected to correlate with the test location. The respondent's paternal birthplace (V001) within the same country is also noted but does not present as particularly compelling, as it is highly likely that any one participant's birthplace is the same as their father's.

AutoML for feature selection in Slovakia and Czech Republic

We also utilised AutoML to create best fit classification models for the Czech Republic and Slovakia. Figure 2 shows feature importance (related to WtF) in the Czech Republic.

Figure 2: Feature importance plot for WVS wave 7 (Czech Republic)



Source: Compiled by authors based on Haerpfer et al. 2022b

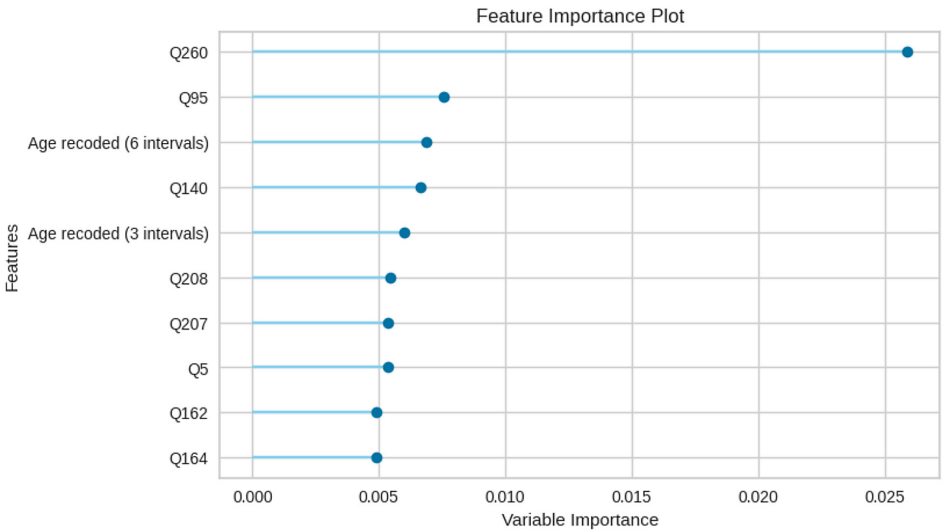
Codes for Figure 2:

Q46 – Feeling of happiness
Q25 – Neighbours: Unmarried couples living together
Q211 – Political action: Attending lawful/peaceful demonstrations
Q102 – Active/Inactive membership: consumer organisation
Q279 – Employment status
Q206 – Information source: Internet
Q260 – Sex
Q196 – Government has the right: Keep people under video surveillance in public areas
Q113 – Involved in corruption: State authorities
Q22 – Neighbours: Homosexuals

In examining the predictors of willingness to fight within the Czech Republic using data from the WVS Wave 7, the primary determinant appears to be happiness (Q46). This finding is particularly noteworthy given the stark contrast to the next most influential factors, which include preferences regarding living proximity to unmarried couples and consumer organisation membership. Employment status (Q279) also emerges as a significant predictor, alongside information sourcing, particularly from the internet (Q206), and the respondent's gender. Additional variables of import include attitudes towards government surveillance in public spaces, trust in state authorities and sentiments towards having homosexual neighbours. This array of factors underscores a multifaceted profile of influences, with happiness at the forefront.

The same method was used in Slovakia to discover the feature importance related to WtF in that country (see Figure 3).

Figure 3: Feature importance plot for WVS wave 7 (Slovakia)



Source: Compiled by authors based on Haerpfer et al. 2022b

Codes for Figure 3:

Q260 – Sex
Q95 – Active/Inactive membership: Sport or recreational organisation, football/baseball/rugby team
Age recoded (6 intervals) – 16–24yo, 25–34yo, 35–44yo, 45–54yo, 55–64yo, 65+yo
Q140 – Things done for reasons of security: Preferred not to go out at night
Age recoded (3 intervals) – up to 29yo, 30–49yo, 50+yo
Q208 – Information source: Talk with friends or colleagues
Q207 – Information source: Social media (Facebook, Twitter, etc.)
Q5 – Important in life: Work
Q162 – It is not important for me to know about science in my daily life
Q164 – Importance of God

Notably, in Slovakia gender emerges as a significant factor, along with engagement in recreational organisations and a subjective sense of safety at night. Information sources, such as friends, colleagues and social media, also play a substantial role. The data underscore the value placed on work and the relative indifference towards science, contrasting with a pronounced concern for religious beliefs.

It is also valuable to discuss the findings from both the Czech Republic and Slovakia in concert, as their similarities are as important as their differences, especially since they were the same country for the majority of the 20th century and separated only 30 years ago.

Our observations on feature importance suggest that variables such as occupation and gender (Q260) are significant. Given that a significant majority of wartime casualties are male, the gender disparity in willingness to fight is an expected but not particularly surprising finding. Across both the Czech Re-

public and Slovakia, one significant factor in both areas was where information is sourced, with a key focus being either from personal contacts in the Czech Republic or via social media in Slovakia. In addition, the avoidance of certain types of neighbours (e.g. homosexuals) may indicate underlying xenophobic attitudes, though this is not conclusively consistent across the data. It's noteworthy that the Czech Republic may have more diverse neighbour profiles compared to Slovakia, potentially influencing this observation.

The patterned findings regarding age, gender and information sources required additional analyses. While the AutoML method is a powerful method of analysis, particularly for exploratory analyses, knowing that a variable has an important relationship is not always theoretically rich, particularly when directionality and significance of the relationship should be taken into account. This is a common shortcoming of many ML models, but in our case can be easily overcome with additional statistical analyses.

Additional statistical tests

First, we begin by running statistical tests for age in the Czech Republic. We found a significant correlation between age and WtF ($r = 0.17$, $p < .001$), suggesting that the older the respondent, the less their WtF. In fact, when using a between groups analysis, a X^2 test revealed a significant association between age groups and willingness to fight in the Czech Republic ($X^2 = 11.306$, $p = .001$). This indicates that those born before the end of conscription were more willing to fight in the Czech Data. See Table 2.

Table 2: Importance of age for WtF in Czech Republic

	Mean	Median	Std	Count
Born after 1986	1.537500	2.0	0.500157	160
Born before 1986	1.678954	2.0	0.467156	841

Source: Compiled by authors based on Haerpfer et al. 2022b

Next, we ran a X^2 test to test for a relationship between sex and WtF in the Czech data. Here we found a significant relationship ($X^2 = 57.24$, $P < .001$, $Df = 1$). A crosstab table is shown below in Table 3.

Table 3: Importance of sex for WtF in Czech Republic

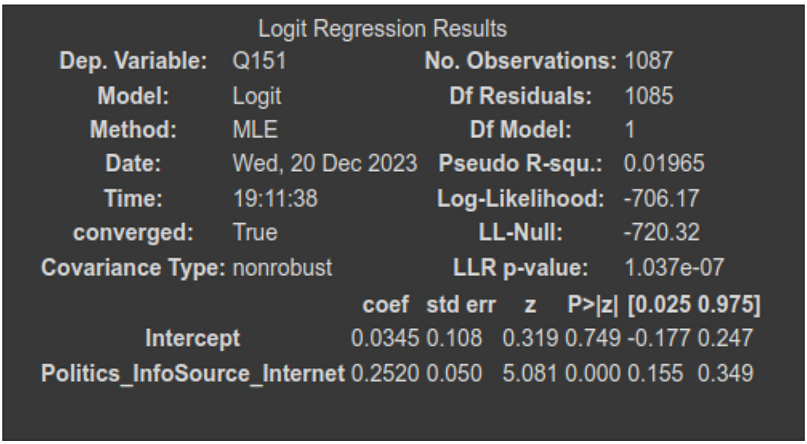
	WtF Yes	WtF No
Male	252	257
Female	158	425

Source: Compiled by authors based on Haerpfer et al. 2022b

This analysis suggests that while men are split almost 50/50 in their WtF, women are far more likely to respond 'no' in regards to WtF.

Lastly, we ran a logistic regression to see if there is a significant relationship between the information source and WtF and we do in fact find a significant relationship (Figure 4).

Figure 4: Information source and WtF for Czech Republic



Logit Regression Results

Dep. Variable:	Q151	No. Observations:	1087
Model:	Logit	Df Residuals:	1085
Method:	MLE	Df Model:	1
Date:	Wed, 20 Dec 2023	Pseudo R-squ.:	0.01965
Time:	19:11:38	Log-Likelihood:	-706.17
converged:	True	LL-Null:	-720.32
Covariance Type:	nonrobust	LLR p-value:	1.037e-07

	coef	std err	z	P>|z|	[0.025	0.975]
Intercept	0.0345	0.108	0.319	0.749	-0.177	0.247
Politics_InfoSource_Internet	0.2520	0.050	5.081	0.000	0.155	0.349

Source: Compiled by authors based on Haerpfer et al. 2022b

To check for the significance and directionality of age in our Slovakia sample, we ran a correlation to check for significance and directionality. We found a reasonably strong correlation ($r=0.21$, $p<.001$) between age and WtF, suggesting that the older one is, the less their WtF.

Similar to the analysis of the Czech Republic, we also wanted to see if conscription may be a driver in the relationships on age. A X^2 test revealed a significant association between age groups and willingness to fight in Slovakia ($X^2=7.76$, $p=.005$), indicating those born before the end of conscription were more willing to fight. See Table 4 below.

Table 4: Importance of age for WtF in Slovakia

	Mean	Median	Std	Count
Born after 1987	1.549618	2.0	0.498484	262
Born before 1987	1.647768	2.0	0.477954	829

Source: Compiled by authors based on Haerpfer et al. 2022b

In addition, we wanted to see if gender was significantly related to WtF in Slovakia as well, particularly when it comes to the general observation that men

tend to be the perpetrators and victims of wartime combat. In running a X2 analysis to test for a significant relationship between gender and WtF we do in fact find a significant relationship (X2 = 61.98, p <.001, Df = 1). A crosstab table is shown below (Table 5).

Table 5: Importance of sex for WtF in Slovakia

	WtF Yes	WtF No
Male	226	253
Female	125	409

Source: Compiled by authors based on Haerpfer et al. 2022b

This analysis, similar to that of the Czech Republic, suggests that while Slovak men are split almost 50/50 in their WtF, Slovak women are far more likely to respond 'no' in regards to WtF. It is well known that almost all violence is committed by young males 18–25 (Peterson & Wrangham 1997; Ormhaug, Meier & Hernes 2009). But does this apply to the state-sanctioned violence involved in war? Our research confirms the idea that it is indeed younger men who are more WtF for their countries.

Lastly, we wanted to check for their ratings of WtF and their response to the information source of social media in Slovakia. By running a logistic regression between their answers regarding WtF and the importance of social media as an information source, we did find a significant model.

Figure 5: Information source and WtF for Slovakia

Logit Regression Results

Dep. Variable:	Q151	**No. Observations:**	1009
Model:	Logit	**Df Residuals:**	1007
Method:	MLE	**Df Model:**	1
Date:	Wed, 20 Dec 2023	**Pseudo R-squ.:**	0.01785
Time:	19:11:59	**Log-Likelihood:**	-639.68
converged:	True	**LL-Null:**	-651.30
Covariance Type:	nonrobust	**LLR p-value:**	1.423e-06

	coef	std err	z	P>|z|	[0.025	0.975]
Intercept	0.1443	0.120	1.206	0.228	-0.090	0.379
Politics_InfoSource_SocialMedia	0.1848	0.039	4.746	0.000	0.108	0.261

Source: Compiled by authors based on Haerpfer et al. 2022b

The observed positive relationship suggests that the more frequently Slovaks use social media, the less willing to fight they are.

Analysis 2 – features and factors in 'Willingness to Fight' in Czech Republic and Slovakia

In the following analyses, we focused only on the Czech Republic and Slovakia with special attention on the features and factors (especially psychological) that are related to willingness to fight to defend one's country. The Big Five personality scale, also known as the OCEAN model, categorises personality traits into five broad dimensions: Openness (creativity and willingness to explore new experiences), Conscientiousness (diligence and reliability), Extraversion (sociability and assertiveness), Agreeableness (compassion and cooperativeness) and Neuroticism (tendency towards emotional instability and anxiety). This model is widely used in psychology to understand human behaviour and personality.

In the context of understanding one's willingness to fight for their country, these traits can offer significant insights. For example, high Extraversion might correlate with a greater propensity for social engagement and leadership roles, potentially influencing one's inclination to participate actively in national defence. High Agreeableness could indicate a stronger sense of empathy and community, possibly motivating individuals to protect their country. Conversely, high Neuroticism might relate to a higher sensitivity to threats, possibly either increasing or decreasing willingness to fight depending on individual coping mechanisms and trust in institutions. Conscientiousness may be associated with a sense of duty and responsibility, influencing commitment to national causes. Openness could impact one's perspective on global and national issues, thereby shaping their stance on defence and conflict. Thus, the Big Five traits provide a multifaceted framework to analyse the complex motivations behind one's willingness to engage in national defence.

Figure 6: IP IP Czech Republic

Logit Regression Results

Dep. Variable:	Q151	**No. Observations:**	1092
Model:	Logit	**Df Residuals:**	1086
Method:	MLE	**Df Model:**	5
Date:	Mon, 11 Dec 2023	**Pseudo R-squ.:**	0.02874
Time:	22:38:19	**Log-Likelihood:**	-701.92
converged:	True	**LL-Null:**	-722.68
Covariance Type:	nonrobust	**LLR p-value:**	7.323e-08

	coef	std err	z	P>|z|	[0.025	0.975]
Intercept	0.3203	0.660	0.485	0.627	-0.973	1.614
Big_5_Openness	-0.1837	0.101	-1.827	0.068	-0.381	0.013
Big_5_Conscientiousness	0.2681	0.100	2.677	0.007	0.072	0.464
Big_5_Extraversion	-0.2422	0.087	-2.788	0.005	-0.412	-0.072
Big_5_Agreeableness	-0.0518	0.097	-0.537	0.591	-0.241	0.137
Big_5_Neuroticism	0.3185	0.110	2.903	0.004	0.103	0.533

Source: Compiled by authors based on Haerpfer et al. 2022b and Moravec, Kosnac and Gloss 2022

To measure personality, as stated above, we relied on the IPIP-20 scale, a short but well validated measure of personality. Figure 6 shows the personality summary for the Czech Republic.

The results indicated that Agreeableness was not a significant predictor of WtF in the Czech Republic. Neuroticism showed a positive relationship, which makes sense because Czechs trust their institutions (more than Slovaks). Extraversion displayed a negative association with the willingness to fight. Conscientiousness demonstrated a positive correlation, suggesting a potential influence on the decision to engage in national defence. Openness, conversely, showed a negative correlation, though this was not statistically significant, with a p-value of 0.068, slightly above the conventional threshold for significance.

Figure 7: IP IP Slovakia

Logit Regression Results

Dep. Variable:	Q151	**No. Observations:**	1013
Model:	Logit	**Df Residuals:**	1007
Method:	MLE	**Df Model:**	5
Date:	Mon, 11 Dec 2023	**Pseudo R-squ.:**	0.04782
Time:	22:37:46	**Log-Likelihood:**	-622.38
converged:	True	**LL-Null:**	-653.64
Covariance Type:	nonrobust	**LLR p-value:**	3.666e-12

	coef	std err	z	P>|z|	[0.025	0.975]
Intercept	0.0177	0.678	0.026	0.979	-1.311	1.346
Big_5_Openness	-0.4201	0.106	-3.963	0.000	-0.628	-0.212
Big_5_Conscientiousness	0.4729	0.116	4.086	0.000	0.246	0.700
Big_5_Extraversion	-0.3653	0.096	-3.810	0.000	-0.553	-0.177
Big_5_Agreeableness	0.1502	0.119	1.259	0.208	-0.084	0.384
Big_5_Neuroticism	0.3490	0.122	2.865	0.004	0.110	0.588

Source: Compiled by authors based on Haerpfer et al. 2022b and Kosnáč, Gloss and Podolinska 2022

Figure 7 shows the results for the logit regression personality in Slovakia. The Big Five personality traits were examined as predictors. Openness showed a significant negative association (coef = –0.4201, $p < 0.001$), indicating that individuals scoring lower in Openness are more inclined to express WtF for their country. Conscientiousness presented a positive relationship (coef = 0.4729, $p < 0.001$), suggesting that higher levels of Conscientiousness may increase the propensity to engage in national defence.

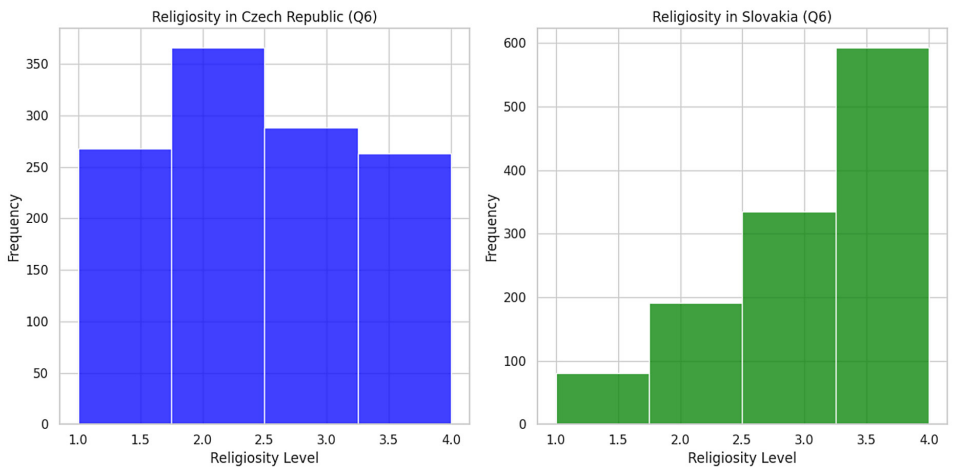
Extraversion was negatively correlated with the willingness to fight (coef = –0.3653, $p < 0.001$), suggesting that less extraverted individuals might be more likely to express a WtF for their country. Agreeableness showed a positive but non-significant association (coef = 0.1502, $p = 0.209$). Neuroticism also showed a positive correlation (coef = 0.3490, $p = 0.004$), indicating that higher levels

of Neuroticism might be related to a greater WtF. These results provide an intriguing insight into the personality profiles of individuals in Slovakia and their stated willingness to engage in national defence, with significant roles for Openness, Conscientiousness, Extraversion and Neuroticism, while Agreeableness did not prove to be a significant factor.

In some of our previous research, we found that individuals who endorse extremist groups tend to be less agreeable, less neurotic and more open than non-extremists. Our results regarding the responses to the personality scale revealed that, generally, respondents were high in Agreeableness, but low in Neuroticism. Interviews with a Slovakian paramilitary group found that in this population Neuroticism was significantly lower than all other personality traits and that Openness was significantly higher than Extraversion. We also found that the paramilitary profile uncovered had Agreeableness as the highest scoring personality trait, followed by Openness (Kosnáč et al. 2023).

It is well known that variables such as religiosity or the importance of God play an important role in many global trends today. This, along with the finding reported above that aspects of religious beliefs appear to be affecting WtF prompted us to engage in a further exploration of the significant differences in WtF between Slovakia and the Czech Republic (see Figure 8).

Figure 8: Religiosity in the Czech Republic and Slovakia



Source: Compiled by authors based on Haerpfer et al. 2022b

In a comparative study of religiosity between the Czech Republic and Slovakia, a Shapiro-Wilk test was administered to assess the normality of responses. The test indicated a significant deviation from normal distribution for both the Czech Republic ($W=0.869$, $p<.001$) and Slovakia ($W=0.783$, $p<.001$). Given the non-normal distribution of data, a Mann-Whitney U test was employed to compare

religiosity levels between the two countries. The results revealed a statistically significant difference ($U=337677.5$, $p<.001$), suggesting notable disparities in religious attitudes or practices between the Czech Republic (mean response on religiosity question = 2.46, std = 1.06) and Slovakia (mean = 3.2, std = 0.94).

These issues can potentially be elucidated by adding some additional perspectives. For example, the Czech Republic's higher trust in institutions than in politicians can be interpreted through the lens of their historical, political and social evolution. This dichotomy likely reflects a public perception that institutions – representing systemic, bureaucratic and legal frameworks – are more stable and trustworthy compared to individual politicians, who may be seen as more susceptible to corruption or personal agendas. Such a distinction could influence the WtF for the country, as citizens may differentiate between defending the nation's established systems and values versus aligning with transient political leaders.

Similarly, understanding patterns of conservativism in the two countries can help add context. WtF aligns with traditional conservative values, which often emphasise nationalism, loyalty to one's country and a propensity to uphold and protect cultural and national heritage, aligning with the moral foundations of ingroup loyalty and purity. Along similar reasoning, it could be posited that less conservative populations, like those in the Czech Republic, might prioritise individualistic values over collective nationalistic endeavours, potentially reducing their WtF. However, if this were the case, it could be expected that Czechs' levels of openness (measuring how much individuals might seek unique experiences and hold personal beliefs that diverge from traditional or collective norms) would be positively correlated with WtF, or agreeableness (measuring one's tendency to be part of a larger collective and align with others) would be negatively correlated with WtF. However, in the Czech Republic, neither of these variables were significantly correlated; so any relative values of Czech measurements on these variables relative to Slovakia do not – at least in this analysis – have any bearing on WtF.

Analysis 3 – moral foundations of 'Willingness to Fight' in Slovakia

In this analysis we drill down and focus on a specific country – Slovakia. We selected this country both because it is our area of expertise and because we have data about moral foundations in the country that are not in any of the other WVS data for other countries.

To understand this requires a brief explanation of moral foundation theory (MFT). In its classic formulation, MFT hypothesises five evolutionarily grounded intuitive 'foundations' for morality (Haidt 2007; Graham, Haidt & Nosek 2009). The three labelled ingroup/loyalty, authority/respect and purity/sanctity are commonly referred to as 'binding' foundations because they are theorised to fa-

cilitate the cohesion of social coalitions. The other two (fairness/reciprocity and harm/care) are commonly referred to as 'individualizing' foundations and appear connected to the emphasis within the liberal philosophical tradition on the welfare and rights of individuals. The moral foundations questionnaire (MFQ) has been extensively utilised to show that while liberals tend to rely primarily on individualising foundations, conservatives are more likely to rely on all five foundations. This reveals various combinations of preferred intuitive foundations or 'moral signatures' (Haidt, Graham & Joseph 2009). In *The Righteous Mind*, Haidt added liberty, which we include in our analysis here (Haidt 2013).

In our moral foundations analysis within the Slovak context, we investigated the predictive power of various moral foundations on WtF for one's country, as measured by responses to Q151 in the World Values Survey. The logistic regression analysis, based on 1013 observations, revealed that moral foundations such as Authority (MFQ_AUTHORITY), Harm (MFQ_HARM) and Fairness (MFQ_FAIRNESS) were not statistically significant predictors of WtF. This aligns with Slovakia's noted low trust in political authority, suggesting a complex relationship between institutional trust and combat readiness.

In contrast, Ingroup loyalty (MFQ_INGROUP) displayed a significant negative effect (coef = –0.5126, $p < 0.001$), which is contrary to expectations, as it indicates that a stronger emphasis on ingroup loyalty correlates with a reduced WtF. Purity (MFQ_PURITY) and Liberty (MFQ_LIBERTY) yielded positive but weak coefficients, suggesting that these moral dimensions, albeit significant (purity: coef = 0.3560, $p < 0.01$; liberty: coef = 0.2642, $p < 0.05$), play a modest role in influencing the decision to engage in national defence. Figure 9 displays our results for moral foundations in Slovakia as related to WtF.

Figure 9: Moral foundations in WVS wave 7 (Slovakia)

Logit Regression Results

Dep. Variable:	Q151	**No. Observations:**	1013
Model:	Logit	**Df Residuals:**	1006
Method:	MLE	**Df Model:**	6
Date:	Mon, 11 Dec 2023	**Pseudo R-squ.:**	0.01709
Time:	22:37:16	**Log-Likelihood:**	-642.47
converged:	True	**LL-Null:**	-653.64
Covariance Type:	nonrobust	**LLR p-value:**	0.001050

	coef	std err	z	P>|z|	[0.025	0.975]
Intercept	0.3694	0.493	0.750	0.453	-0.596	1.335
MFQ_AUTHORITY	0.2298	0.152	1.510	0.131	-0.068	0.528
MFQ_HARM	-0.0948	0.156	-0.608	0.543	-0.400	0.211
MFQ_FAIRNESS	-0.1602	0.170	-0.943	0.346	-0.493	0.173
MFQ_INGROUP	-0.5126	0.161	-3.188	0.001	-0.828	-0.197
MFQ_PURITY	0.3560	0.133	2.682	0.007	0.096	0.616
MFQ_LIBERTY	0.2642	0.107	2.478	0.013	0.055	0.473

Source: Compiled by authors based on Haerpfer et al. 2022b and Kosnáč, Gloss and Podolinska 2022

These findings suggest a nuanced moral landscape in Slovakia, where traditional conservative predictors such as Authority do not follow the expected pattern. This might be reflective of a unique Slovak identity that is not strongly tied to institutional authority, and a propensity for anti-systemic behaviour. It raises the possibility of a bimodal distribution, where individuals may be inclined to fight against or independent of traditional military structures, as exemplified by groups like Slovenski Branci. This complexity in moral underpinnings calls for further exploration to fully understand the motivational drivers behind the willingness to fight in Slovakia.

Individuals in society with 'binding' evolutionary moral foundations (measured by MFQ) typically are more willing to protect their communities and to make larger sacrifices for society. It is in the interest of the state to harness this positive communal energy and direct it in a prosocial manner, or individuals with such predispositions may start to seek alternatives that may eventually become problematic in the sense of social cohesion, or even national security. This is a situation documented in the emergence of paramilitary organisations in Slovakia (Kriglerová, Chudžíková & Kadlečíková 2017). This situation may be reinforced in an environment of low trust in state authorities, as is typical for Slovakia (Kosnáč & Gloss 2023, 13–15), which reinforces anti-establishment and anti-system sentiments and strengthens impulses for different groups in a society to create or seek alternatives to the state system, as we can see lately in the emergence of alternative currencies (the rise of cryptocurrency alternatives), alternative education, alternative lifestyles and in more problematic ways also alternative security (paramilitary organisations not affiliated with the state).

Conclusion

In this article, we have presented a comprehensive analysis of the factors influencing an individual's willingness to fight for their country, leveraging data from the World Values Survey with a particular focus on the Czech Republic and Slovakia. Utilising Automated Machine Learning (AutoML), we identified that within the Big Five personality traits, Conscientiousness and Neuroticism have a positive association, while Extraversion and Openness are negatively linked to the willingness to engage in national defence, with Openness's effect being statistically insignificant. Our moral foundations analysis, specific to Slovakia, highlighted that Authority, Harm and Fairness are not significant predictors, whereas Purity and Liberty are positively correlated and Ingroup loyalty surprisingly inversely so. These findings are situated in the context of Slovakia's low trust in traditional authority, suggesting a propensity for anti-systemic and non-traditional forms of defence engagement. The results from the Czech Republic underscore similar themes but also emphasise the role of cultural differences and the distinct sociopolitical landscape in shaping

these predispositions. The study elucidates the intricate relationship between personality, moral convictions and cultural context, challenging conventional paradigms and revealing a complex spectrum of motivations behind the willingness to fight for one's country.

A limitation shared by other survey analyses is vagueness of exactly what it means to 'fight for' or 'defend' one's country. Does it mean citizens' willingness to respond to an immediate threat from another country? Does fighting or defending include not just military or violent resistance but other forms of participation in defence (supporting military efforts indirectly, logistical support, hacking) or even acts of nonviolent critique? What level of intensity or involvement qualifies as fighting or defending? Another challenge is that defending or fighting will mean something different in various cultural contexts, both in terms of the emotional valence of words translated in the questions but also the value or meaning of defending or fighting. Finally, these findings would be strengthened if we compared additional countries and if other countries also gathered information about moral foundations in their versions of the WVS.

This analysis provides valuable insights into the psychological and moral underpinnings of national defence willingness, a subject of profound significance in understanding civic engagement and military participation across different cultures. By illuminating the nuanced interplay between individual personality traits, moral foundations and cultural contexts, our study offers a granular perspective on how citizens relate to the concept of fighting for their country. This is particularly relevant in an era where conventional warfare is augmented by cyber threats and ideological conflicts that transcend national boundaries. As we note below, our findings have practical implications for policy formulation, military recruitment strategies and the development of national unity campaigns, catering to the diverse motivational drivers of citizens. Moreover, these findings can inform cross-cultural communication strategies, contribute insights to the refinement of global conflict resolution approaches and aid in predicting societal responses to national crises. Ultimately, this research contributes to the broader discourse on how individual differences shape collective actions, which is pivotal for policymakers, defence organisations and social scientists aiming to foster cohesive and resilient societies in a rapidly evolving global landscape.

WVS offers a powerful analytical tool for the EU and NATO eastern flank countries and can aid their defence planners in understanding the basic attitudes of the population towards the defence of their countries. As the findings in this paper suggest, the main difference in WtF and defending one's country is mostly cultural. Understanding sacred values, collective identities and sources of self-identification with one's country is the key to understanding the reasons for this willingness and should be handled on the country-level. At the same time, the defence architecture of most European countries, and certainly of the

Czech Republic and Slovakia, similar to other smaller countries in the European eastern flank, such as the Baltics, is based on collective defence (known as Article 5 of the NATO Treaty). It is a key strategic need to understand not only one's WtF in one's own country, but also the willingness of one's allies, since the strategic doctrines of these countries rely on allies. The need may be especially important for the new eastern flank members joining collective defence, such as Finland and Sweden. That creates a need for a common survey on the EU/NATO level. It is not enough to build military interoperability – paying attention to willingness of populations of different countries sharing the same defence responsibilities should be a new norm as well – since the chain is only as strong as its weakest link.

Acknowledgements

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Political Regimes and Institutional Design as Factors in War: World, Regional and National Contexts

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Abstract: *The article investigates the political and institutional factors that shape the initiation, participation and outcomes of interstate wars. It highlights the importance of political regimes and systems of government, or institutional design. While democratic peace theory has long argued that democracies are less likely to fight and more likely to prevail, this study broadens the perspective by examining the impact of parliamentary, presidential and semi-presidential systems as forms of institutional design. The analysis relies on a dataset of 59 wars involving 153 states between 1919 and 2020, defined according to a threshold of 50 military deaths or 600 personnel per side, which distinguishes substantive conflicts from minor incidents, and assesses the correlations between political regimes, institutional designs and warfare through comparative and statistical methods. The findings indicate that the system of government has no statistically significant effect on the likelihood of initiating war. Yet, parliamentary and parliamentarised systems emerge as the most frequent participants and as the most frequent victors, particularly within democratic settings. The study therefore enhances both the empirical and theoretical understanding of war by showing that the combination of a parliamentary institutional design and a democratic regime is linked to greater military success, at both global and regional levels. While the analysis deliberately excludes other factors such as economic variables or alliance membership to focus specifically on domestic political and institutional effects, it identifies consistent correlations rather than causal mechanisms, thereby providing a basis for future research into the link between internal political/institutional structures and international conflict behaviour.*

Keywords: ***political regime, institutional design, system of government, presidentialism, semi-presidentialism, parliamentarism, democracy, autocracy, war, interstate armed conflict***

Introduction

Historically, interstate warfare has been a central instrument of foreign policy and international relations. Armed conflicts not only shape states' external positions but are also closely intertwined with domestic political and institutional relations. These conflicts simultaneously affect and depend on internal political dynamics. A substantial body of research has examined the causes, participation and outcomes of such wars. Realist scholars, for example, emphasise the anarchic nature of the international system, in which states prioritise the defence of their interests and borders, often through military force. However, liberal scholars argue that trade fosters peaceful relations among nations, whilst war represents an economically irrational gamble with high risks and uncertain benefits.

A large body of research has examined state behaviour, particularly the propensity for war or peace, by analysing the characteristics of political regimes. Democratic peace theory, in particular, highlights the link between international conduct and domestic regime attributes. Yet most studies stop at this level, typically treating political regimes as democratic, autocratic or hybrid. Less attention has been paid to how inter-institutional relations and institutional designs – reflected in presidential, parliamentary and semi-presidential systems – affect the initiation, participation and outcomes of wars. This question is especially relevant in light of the ongoing Russo-Ukrainian war and other contemporary conflicts. The present study addresses it through comparative, statistical and correlational analysis of cases at the global, regional and national levels. In doing so, it shows how different combinations of political regimes and institutional designs can shape domestic political processes and influence the causes and outcomes of wars.

The objective of this article is to examine the political and institutional factors that shape the initiation, participation and outcomes of wars and interstate armed conflicts. Particular attention is given to institutional design (systems of government) and the influence of political regimes, considered globally as well as in regional and national contexts. The article is organised into five main sections. The first sets out the conceptual framework, including definitions and classifications of key concepts such as 'war' and 'interstate armed conflict'. The second reviews the main theoretical approaches and the existing state of research on the political and institutional factors of wars, with a focus on political regimes, institutional design and systems of government. The third explains the research design, outlining the definitions, methodology and analytical framework, as well as the data selection and classification approaches. The fourth presents the empirical findings of the comparative and statistical analysis, covering both global patterns and regional context or national cases. The fifth synthesises the results, discusses observed patterns and correlations, and considers their implications for understanding the interaction between

political regimes, institutional designs and warfare. The article concludes by summarising the main contributions. It also suggests directions for future research.

Conceptual framework for analysing wars and interstate armed conflicts

The central aim of this study is to provide a comparative analysis of different political regimes and institutional designs (systems of government) as factors influencing wars before, during and after conflicts between states. The analysis examines the distinctive features, processes of initiation, levels of participation and outcomes of wars under various political and institutional conditions at the global, regional and national levels. As a first step in the theoretical framework, the study defines and categorises the key concepts employed throughout, including 'interstate armed conflict', 'war', 'political regime', 'institutional design' and 'system of government'.

Despite extensive scholarly efforts, no broad consensus exists on how to conceptualise armed conflict. A commonly accepted approach links armed conflict between states to the provisions of the 1949 Geneva Conventions (Diplomatic Conference 1949; Evangelista & Tannenwald 2017; van Dijk 2022). These Conventions identify key criteria, including a declaration of armed conflict, territorial occupation and the capture of opposing combatants. Accordingly, an armed conflict may be defined as a confrontation between two or more states (high contracting parties) resulting in territorial occupation and/or the capture of enemy combatants (Balendra 2008: 2461).

However, the Geneva Conventions do not provide clear guidance on distinguishing interstate from intrastate conflicts. Article 2 of the Geneva Convention Relative to the Treatment of Prisoners of War (Diplomatic Conference 1949) states that any dispute between states involving armed forces constitutes an international armed conflict, irrespective of its duration and intensity. The Conventions take immediate effect once armed forces are deployed to the territory of another state and casualties, victims or prisoners appear (Vité 2009). Consequently, the onset of an international or interstate armed conflict (i.e. the initiation of hostilities) is marked by the moment that the pertinent provisions of the Conventions take effect. This ambiguity allows states to classify minor confrontations as full-scale armed conflicts or wars, even when actual hostilities are limited (O'Connell 2008: 397).

Relying solely on the principles and provisions of international law when defining the concept of (interstate) armed conflict is therefore insufficient. Numerous scholars (Balendra 2008; Eriksson & Wallensteen 2004; Eriksson, Wallensteen & Sollenberg 2003; Farer 1971; Harbom & Wallensteen 2005, 2009; O'Connell 2008; Pettersson & Wallensteen 2015; Stewart 2003; Them-

nér & Wallensteen 2011, 2013, 2014) have employed various methodologies to address this challenge, reflecting the absence of a universally accepted definition of armed conflict and war. Likewise, classifications of armed conflicts in the literature (Akande 2012; Bartels 2020; Sarkees 2010: 7–10; Stojar 2017; Vasquez & Valeriano 2010; Vité 2009) vary considerably and are somewhat arbitrary, though they typically distinguish between interstate (international) and non-interstate (non-international) conflicts.

Given this study's focus on interstate armed conflicts in the context of domestic political regimes, inter-institutional relations and institutional design, it is essential to clarify the concept of war. War represents the most consequential form of armed conflict at global, regional and national levels. Yet, despite long scholarly debate, there is still no consensus on a single, unambiguous definition. It is generally accepted, however, that war is narrower than armed conflict. It is marked by high-intensity violence, often involving large-scale military operations and produces significant consequences for both the states involved and the wider international community. Scholars have defined war as organised violence between two political groups (Vasquez 1993: 23) or as a major armed conflict between the military forces of independent political entities (Levy 1983: 51). Despite the ambiguity and differences in wording, researchers broadly agree that war is distinct from other forms of armed conflict because of its scale and intensity (Eagleton 1932: 237; Greenwood 1987; Holsti 1996; Levy 1983: 51–52; O'Connell 2005: 535; Vasquez 1993: 23).

Efforts to define war have long focused on identifying clear criteria that distinguish it from other forms of armed conflict and that clarify its empirical content. Scholars have proposed a variety of thresholds and criteria. Richardson suggested that conflict must exceed 2.5 points on his scale, equivalent to at least 317 casualties (Rapoport 1957). Bodart and Kellogg (1916) required over 2,000 total casualties on both sides. Wright and Wright (1983) set the bar at the involvement of at least 50,000 military personnel. Singer (1970), founder of the Correlates of War project, defined war as producing at least 1,000 military and civilian deaths. Levy (1983: 52), by contrast, suggested a lower threshold of 100 deaths or 1,000 personnel involved. Among these approaches, Singer's (1970) definition and criteria within the Correlates of War project have gained the widest acceptance, largely due to their strong empirical foundation and extensive case coverage (Sarkees 2010: 7–10).

Despite these contributions, there is still no consolidated or universally accepted quantitative threshold and criteria for identifying the onset (initiation) of war. This lack of clarity has forced researchers to combine existing and new indicators to conduct their analyses. The criteria cited above are relatively demanding – focusing on large-scale conflicts – and thus more consistent with definitions of war than with those of armed conflict more generally. Given this context, the present study adopts its own threshold of 50 fatalities or the involve-

ment of at least 600 personnel per side as a way of distinguishing substantive conflicts (wars) from minor incidents.[1] This approach is explained in greater detail in the research design and methodology section.

Political and institutional factors of wars: Theory and state of research

Researchers often focus on identifying the factors that cause wars when defining them and categorising armed conflicts within specific criteria. This is not surprising, as scholars regularly examine how different political regimes engage in wars – from initiation through to participation and eventual conclusion. These analyses typically use the 'maximum democracy–maximum autocracy' continuum as their theoretical framework.

Extensive research in political science and international law has examined these factors and their relations. The literature provides compelling evidence that political regimes play a statistically significant role in war initiation, peace maintenance and conflict outcomes. This is most evident in democratic peace theory, which developed from detailed studies comparing political regimes and their war-related behaviour. The theory argues that democratic regimes are generally more peaceful internationally than autocratic regimes, which are more frequently responsible for initiating wars worldwide. Nevertheless, democratic peace theory does not fully explain this phenomenon, nor does it comprehensively analyse when and why democracies choose to use military force against other states, whether autocratic or democratic. Addressing this requires a multifaceted approach incorporating different perspectives: the normative perspective (Kant 2015; Dixon 1994), the economic perspective (Lake 1992) and the institutional perspective (Bueno de Mesquita et al. 1999).

The normative approach emphasises the importance of norms, practices and customs characteristic of democratic nations. This perspective draws on Kant's (2015) concept of perpetual peace, which argues that warfare occurs primarily when force prevails over law in international relations. Kant hypothesised that increasing the number of democratic states (which he considered predominantly republics) would substantially reduce global wars. Contemporary scholars, notably Dixon (1994: 15–16), have developed this framework further, arguing that democracies apply domestic competition rules and market principles when pursuing international interests. This suggests that democracies can

1 This study's exclusion of minor incidents reflects an analytical necessity rather than a definitional limitation. Including all cases meeting only the Geneva Conventions' minimal criteria would encompass many situations lacking political significance or escalatory potential characteristic of interstate wars. The thresholds therefore serve as analytical filters rather than definitional boundaries to capture interstate wars, not isolated skirmishes.

transfer their domestic political processes – particularly competitive elections and decision-making – to international relations.

However, democratic competition operates within legal constraints, including protections for minority rights, especially when electoral minorities face majority rule. From this normative perspective, democratic pacifism rests on the assumption that fair competition principles have become deeply institutionalised as legal norms in democracies. The non-violent principle underlying democracy requires avoiding military measures and adopting alternative influence strategies. This principle extends to international/interstate relations, particularly in conflicts between democracies, where all parties recognise their obligation to follow international norms rather than resort to violence (Dixon 1994: 17–18). However, democracies show less restraint when confronting autocratic or hybrid regimes.

The economic approach to explaining democratic pacifism draws on microeconomic theory developed by Lake (1992: 25–27). This theory treats the state as a commercial entity that provides services and seeks to maximise profits. National security represents a primary state business, where the state functions as a monopolist due to its unique capacity to guarantee security. Typically, a monopolistic state would maximise revenue by setting prices to yield the highest rental income, potentially leading to expansionist policies as it seeks greater rent extraction.

However, Lake argues that democracies cannot rely on monopoly rents like autocracies do. Democratic regimes differ from non-democratic ones in two crucial ways. First, democratic populations participate in decision-making, which incentivises economic growth over rent extraction. Second, open borders and freedom of movement allow citizens to migrate in response to unfavourable economic conditions. These factors make democracies more economically resilient than non-democratic states, providing substantial advantages in warfare through greater national wealth and resource allocation capacity. Consequently, democracies rarely fight each other because they cannot benefit from monopoly rents in the same way autocracies can. However, democratic societies may still engage in warfare with autocratic regimes, despite the latter's potential resource advantages.

From the institutional perspective, these issues are also of considerable relevance. A substantial body of literature has examined the relations between the initiation and outcomes of wars and the characteristics of political regimes, with particular emphasis on the functionality of domestic political institutions. In democratic regimes, political leaders who assume office through elections are obliged to balance the allocation of resources between national security and the provision of benefits for their majority or coalition. This consideration becomes especially pertinent in the context of an impending war, as the outcome – victory, defeat or draw – directly influences the political leader's tenure.

Institutional analyses show that leaders of democratic states are more likely to wage war against autocratic regimes when success appears attainable. Historical data also suggest that democracies achieve more favourable outcomes than autocracies. This pattern reflects the incentives of democratic leaders to commit substantial resources to achieving victory, since their authority depends on success in a democratic system. The same logic explains why democracies rarely fight one another, instead directing military interventions against autocratic states. Democratic leaders anticipate that counterparts in other democracies will likewise mobilise all available resources to prevail (Bueno de Mesquita et al. 1999: 793–794). Such mutual recognition constrains conflict initiation and war escalation between democracies, whereas such constraints are less pronounced for autocratic leaders.

In summary, democratic peace theory – in its normative, economic and institutional perspectives – suggests that wars between democratic states, if they occur, are likely to be protracted, complex and unprofitable. Consequently, democratic leaders and nations tend to prioritise peace over military action. Autocratic regimes, by contrast, face fewer economic, institutional and normative constraints and have greater freedom to engage in wars. However, they remain more likely to fail because of their limited capacity to sustain prolonged military campaigns and achieve decisive outcomes.

In contrast to the well-established dichotomy between democracies and autocracies in warfare, political science and international relations still lack a coherent framework for explaining how institutional designs and systems of government shape the initiation, participation and outcomes of interstate wars. Several scholars argue that presidential systems (presidentialism) are particularly prone to initiating wars and provide empirical support for this claim. Kroenig and Schramm (2021) contend that presidential democracies are more likely to engage in warfare than other forms of democratic governance, owing to weaker constraints on executive power from other political institutions. Similarly, Albalate, Bel and Elias (2012: 287–288) identify a correlation between presidential systems and the high costs of developing and sustaining a military-industrial complex, since these systems require substantial resources to maintain armed forces and conduct campaigns.

These demands can generate instability within the political system and inter-institutional relations. As national production of military goods expands, the need for effective marketing strategies also grows. In such circumstances, presidential systems – or systems with influential presidents emulating presidentialism – may initiate wars as a means of managing potential overproduction crises (Albalate, Bel & Elias 2012). Furthermore, Amorim Neto and Accorsi (2022: 150–159) show that non-partisan military officers serving as ministers of defence are most prevalent in presidential republics, a pattern that may additionally contribute to the heightened frequency of wars associated with this

institutional design. Collectively, these findings suggest that presidential systems tend to display more assertive behaviour in international relations than other institutional designs.

Alternatively, Reiter and Tillman (2002: 820–824) argue that the likelihood of warfare is statistically negligible when comparing presidential, parliamentary and semi-presidential systems. They further suggest that premier-presidential systems (a subtype of semi-presidentialism) are the most 'pacifist' statistically, though this does not apply to president-parliamentary systems (another subtype). Likewise, Leblang and Chan (2003: 391–398) challenge the notion that presidential republics are inherently aggressive, finding no significant differences in international behaviour between parliamentary and presidential systems, including in war initiation and participation. Furthermore, they identify no significant correlation between the propensity for warfare and the type of government, whether single-party or coalition, holding a majority or minority.

Overall, these findings indicate that war dynamics – including initiation, participation, course and outcomes – may not be primarily determined by institutional design or inter-institutional relations. Instead, the influence of political leaders and ruling parties frequently outweighs that of formal institutions (Palmer, London & Regan 2004: 16–19). Nevertheless, these conclusions remain tentative, highlighting the continued need for research to develop and empirically test new hypotheses about the links between institutional designs and the initiation and outcomes of wars.

Research on the political factors in warfare generally indicates that democratic regimes are more peaceful than autocratic ones. Democracies are less likely to engage in armed conflict and, when involved, tend to pursue peaceful resolutions. Empirical evidence further suggests that democracies achieve more favourable outcomes in wars compared with non-democratic regimes. Scholars attribute this to several mechanisms linking different political regimes with the initiation, participation and outcomes of wars: Democracies uphold international law (Dixon 1994), their economic systems and national security expenditures shape superior military capacity (Lake 1992), and democratic leaders exercise prudence in decision-making due to the risk of losing office (Bueno de Mesquita et al. 1999).

By contrast, research on institutional factors in war – particularly institutional designs and inter-institutional relations – has been insufficiently developed. Studies have primarily examined governments, party systems and the ideological orientation of ruling parties, assessing their behaviour and influence on war initiation and outcomes. Consideration has also been given to electoral systems (Leblang & Chan 2003), citizen political engagement (Reiter & Tillman 2002) and governing ideologies (Palmer, London & Regan 2004). While the effects of political regimes on war dynamics are well-established, the role of institutional designs and systems of government remains comparatively underexplored.

This study addresses this gap by providing systematic analysis of how political regimes and institutional designs influence war dynamics.

This focused approach requires clarification regarding scope. The study deliberately concentrates on macro-political institutions – specifically, systems of government and political regimes – rather than attempting comprehensive institutional analysis. While economic institutions, military structures, bureaucratic arrangements and alliance systems undoubtedly shape war dynamics, including them would fundamentally alter the research design and analytical focus. The analysis therefore isolates how institutional configurations and political regime types facilitate or constrain decisions on military engagement. This narrower focus enables systematic examination of previously underexplored relations between institutional design and conflict behaviour, while providing a foundation for future research that integrates broader institutional and structural factors.

Research design and methodology in studying political regimes and institutional designs as factors of wars

Most existing studies on political and institutional factors of war rely on mathematical modelling and focus primarily on the democracy-autocracy dichotomy, treating political regime type as the decisive factor in explaining the initiation, participation and outcomes of wars. Yet research on institutional factors remains scarce, especially in statistical analyses. To address this gap, the present study develops a research framework, methodology and dataset centred specifically on wars, political regimes and institutional designs (systems of government). This framework allows us to test hypotheses about how different institutional and political arrangements shape the likelihood of war onset, participation and outcomes. In this design, systems of government and political regime types are treated as both independent and dependent variables.

The rationale for searching and utilisation of relevant data and constructing bespoke dataset was the need to analyse and compare wars – their initiation, course and outcomes – across states with different political and institutional arrangements. These comparisons are based on contemporary classifications of states' political regimes and systems of governments, applied to a century-long time frame (1919–2020). Examining such a long period makes it possible to capture the full spectrum of institutional designs (systems of government) under varying political regime types. Variation in systems of government, combined with contrasting political regimes, has historically shaped how wars have begun and unfolded.

To operationalise this, a proprietary dataset was assembled for comparative and statistical analysis. It combines existing databases, adapted where necessary, with new data verified empirically. The sources include datasets on wars and armed conflicts (modified versions of established projects), political regimes

(used largely without modification) and institutional designs or systems of government (created through a synthesis of existing analytical typologies and original coding based on constitutional texts and state practice).

For the purposes of this study, interstate wars and other armed conflicts are defined using clear quantitative thresholds to distinguish them from minor armed incidents. Drawing on both conceptual debates and existing criteria, we adopt two primary but alternative indicators. First, each state must suffer at least 50 fatalities among regular troops. Second, each state must deploy at least 600 military personnel. A war is thus subject to analysis and correlation when at least one alternative threshold is reached by each of the principal parties. By contrast, clashes that meet the Geneva Conventions' minimum definition of armed conflict but fall below both thresholds are excluded as skirmishes or disputes. This ensures that the analysis covers only full-scale wars, thereby avoiding statistical distortion from minor incidents.

While the Geneva Conventions provide the legal and functional baseline for identifying armed conflicts, they do not prescribe precise quantitative thresholds for analytical purposes and empirical research. The 50-fatality and 600-personnel criteria adopted here represent a deliberate methodological choice aimed at capturing conflicts with genuine escalatory potential. This approach builds on established scholarly practice, though at significantly lower thresholds than those used in major datasets and research such as the Correlates of War project (1,000 battle deaths; Singer 1970), Richardson's study (317 casualties; Rapoport 1957), Bodart and Kellogg's (1916) study (2,000 casualties), Wright and Wright's (1983) study (50,000 personnel) or Levy's (1983) study (100 deaths or 1,000 personnel). By contrast, our thresholds are designed to include a broader range of analytically significant cases while excluding minor incidents unlikely to represent interstate wars.

The selection of these thresholds is guided by considerations of analytical sensitivity rather than restrictiveness. While higher thresholds – such as Levy's (1983) 100-fatality / 1,000-personnel benchmark or the Correlates of War criterion of 1,000 battle deaths – are well established in the literature, they systematically exclude a range of conflicts that nonetheless involve sustained political mobilisation under different political regimes and institutional designs. At the same time, the thresholds adopted here are sufficiently restrictive to exclude isolated, accidental or purely provocative military incidents lacking independent political significance. The lower thresholds are therefore intended to capture interstate wars at earlier stages of escalation, rather than only their most destructive phases, without altering the relative distribution of political regime types, institutional designs or systems of government across the sample.

The theoretical rationale rests on the concepts of political investment, war-fighting intent and escalatory potential. The 50-fatality threshold indicates meaningful combat engagement, while the 600-personnel threshold captures

substantial deployments even in the absence of immediate casualties. Together, these alternative criteria ensure that the analysis focuses on conflicts reflecting deliberate state decisions to wage war, rather than short-lived skirmishes, diplomatic confrontations or border clashes that briefly involve military forces.

Within this framework, the 'analytical beginning' of an interstate war is defined as the point at which all main participants cross either the 50-fatality threshold or the 600-personnel threshold. The 'analytical finish' occurs once the outcome of war is clear – victory, defeat or draw. Any state that declares war, or initiates undeclared hostilities, and surpasses one of these thresholds is classified as a participant. For each analytical case of war, the number of countries is limited to seven – those most directly and significantly involved. This rule ensures broad empirical coverage while maintaining analytical clarity.

The limitation of war participants to a maximum of seven states per conflict reflects the same concern for analytical clarity that underlies the definition of thresholds. In practice, this upper bound corresponds to the largest number of active decision-making participants observed in the cases under study. Its purpose is to capture the principal decision-making actors directly involved in war initiation, conduct and outcome, while avoiding the mechanical over--representation of large coalition wars, where secondary or symbolic participants – often included through alliance membership – exert limited independent influence over strategic decisions. Including all formal participants in such armed conflicts would disproportionately weight alliance dynamics and blur the link between domestic political and institutional arrangements and war-related behaviour, given the limited independent decision-making relevance of many such participants. Alternative participant-selection rules – such as including all participants, varying the numerical cap and/or excluding large coalition wars altogether – were considered conceptually. Each of these alternatives introduces distinct sources of distortion, either by amplifying alliance membership dependence or by excluding analytically central cases. Cross-checks using alternative specifications indicate that while such adjustments affect the size of the sample, they do not alter the core patterns identified in the analysis.

The next stage involved aggregating and analysing the data, followed by further examination, correlation and interpretation to gain deeper insights. Information on wars was drawn from three existing datasets and projects: 1) the Correlates of War project (n.d.), covering 1816–2007; 2) the Major Episodes of Political Violence project, 1946–2019, by the Center for Systemic Peace (2020); and 3) the International Crisis Behavior project, 1918–2019, by Duke University (2020). The synthesis of these sources was guided by the authors' refined definition of interstate war, developed in line with the Geneva Conventions and the specified participation thresholds. Using this approach, 59 wars between 1919 and 2020 were systematically identified and analysed. In total, 153 countries from all world regions were included as participants, representing diverse po-

litical regimes and systems of government. Among them, 68 initiated wars, 61 achieved victories, 55 were defeated and 37 ended in a draw (including repeated outcomes in some cases).

Data on political regimes, classified along the democracy-autocracy continuum, were collected without modification from two comparative projects. The primary source was the Polity IV/V project (Marshall & Gurr 2020), which assesses political regimes on a scale from –10 (most autocratic) to +10 (most democratic), with anocratic regimes in between. This dataset covers the entire period 1919–2020 and allows for consistent global comparison. To supplement it, data from the Freedom in the World project (Freedom House, n.d.) were used for the period 1973–2020. This project rates countries on a 1–7 scale, with 1 denoting the most democratic (free) and 7 the most autocratic (not-free). In addition, it provides a 0–100 'reverse' scale, enabling more nuanced cross-country comparisons of political regimes.

Following the identification of the states involved in wars between 1919 and 2020, a dataset on their institutional designs and systems of government was compiled from a wide range of sources. This step was necessary to capture the broader political and institutional context in which wars occurred. The final analysis drew on several projects: the Constitute Project (n.d.), the Comparative Constitutions Project (n.d.; Elkins & Ginsburg 2022) and the International IDEA Project (n.d.). In addition, supplementary information was taken from the research blogs Semi-Presidential One (n.d.) and Presidential Power (n.d.). These materials provided both current and historical versions of constitutions, other relevant laws and evidence of political practice. Notably, the projects and blogs did not always include such features in a systematic way, which made additional coding necessary. To ensure consistency, a unified theoretical and classification framework was applied. Two distinct approaches to the classification of institutional design and systems of government were used, allowing the study to identify typical forms as well as atypical cases. The results enable comparative and correlational analysis of how institutional design relates to the initiation, participation, course and outcomes of wars worldwide between 1919 and 2020.

The first approach distinguishes six 'pure' types of systems of government: absolute monarchies, dualistic monarchies, presidential republics, semi-presidential republics, parliamentary monarchies and parliamentary republics. The ordering of these types is based on the extent of power exercised by the head of state (monarch or president) in forming and dismissing governments – ranging from greater to lesser influence – or, conversely, on the relative strength of parliament. This is treated as a hierarchy: Processes controlled by the head of state take precedence over those controlled by parliament, and vice versa. The classification also incorporates a scale of institutional complexity, from the most to the least complex, reflecting electoral procedures (e.g. popular versus

parliamentary election of presidents) and mechanisms for removing heads of state from office (e.g. particularly intricate in monarchies). For instance, electing a president by popular vote is considered more complex than election by parliament, while the removal of a monarch in an absolute monarchy is more complex than in a parliamentary monarchy.[2]

In addition to the six 'pure' types of systems of government, it is important to identify atypical institutional designs that do not fit neatly into any of these categories. A system of government is considered atypical if it meets at least two criteria: a) it operates with an atypical or unconventional scheme of inter--institutional relations that cannot be attributed to a 'pure' type – for example, a president and government elected by parliament, but without any mechanism for (parliamentary) dismissal; and b) it employs such an atypical institutional arrangement to achieve specific political goals, such as supporting single-party or non-party rule (as most of these cases and regimes are atypical), sustaining military juntas, or implementing transitional governance, etc. In practice, atypical institutional designs often approximate one of the 'pure' types, most commonly quasi-presidentialism or quasi-parliamentarism. To account for this, the present study applies three different strategies for organising data in relation to wars – their initiation, participation and outcomes. The first treats atypical institutional designs as a distinct category alongside the six 'pure' types. The second excludes them altogether, producing a classification of only six 'pure' types. The third reclassifies atypical cases by aligning them with the closest 'pure' type based on political practice, thereby situating atypical and 'pure' systems of government within a shared comparative framework.

The second classification approach divides all states into three 'pure' types, based on institutional design and inter-institutional relations. The categories

2 The classification of systems of government builds on the definitions and logic developed by Elgie (2011) and Shugart and Carey (1992). Their criteria have been adapted to cover different types of republics and monarchies. On this basis, six 'pure' types of systems of government were identified, along with clear criteria for distinguishing between typical and atypical systems (Osadchuk & Lytvyn 2023). For purposes of operationalisation in the bespoke dataset, the 'pure' types were defined as follows: presidential republic – a republic with a popularly elected president, where parliament cannot dismiss the government, as appointment and dismissal powers rest exclusively with the president; semi-presidential republic – a republic with a popularly elected president, where parliament must possess the power to dismiss the government (a power that may also be shared with the president); parliamentary republic – a republic with a president elected by the legislature, where only parliament can dismiss the government; absolute monarchy – a monarchy where the head of state exercises full control over government and the entire political process, including parliament (if it exists); dualistic monarchy – a monarchy where the head of state exclusively controls the government and the executive, while parliament exercises authority over legislation; parliamentary monarchy – a monarchy where parliament must control the government and has the exclusive power to dismiss it, while the monarch performs primarily ceremonial functions. Their ranking for correlation analyses, as explained above, follows the sequence: absolute monarchies, dualistic monarchies, presidential republics, semi-presidential republics, parliamentary monarchies and parliamentary republics. All other systems of government that do not conform to these definitions or to typical patterns of inter-institutional relations constitute the residual category of atypical systems of government.

are: systems in which the head of state holds dominant authority; systems with a mixed or balanced distribution of power; and systems in which parliament exercises predominant control, as assessed formally or in practice. The logic of this sequence rests on the extent of institutional influence over government formation and, above all, dissolution – descending in the case of the head of state and ascending in the case of parliament. At the same time, this approach cannot fully capture the complexities of electing and removing heads of state, processes that often vary significantly across institutional designs.

Within this framework, absolute monarchies, dualistic monarchies and presidential republics are classified as systems where the head of state dominates. Semi-presidential republics are placed in the balanced category, while parliamentary monarchies and parliamentary republics are classified as systems in which legislatures exercise the greatest influence. Atypical systems are added as a supplementary category, defined by the absence of a clear predominance of any one institution over the government. The same algorithms are used to link these institutional designs with war indicators. Correlations are examined under three scenarios: a) three types plus atypical systems; b) three types excluding atypical systems; and c) three types with atypical systems recategorised between the former.

The present study employed a comparative analytical approach to examine correlations between the initiation, participation and outcomes of wars and several variables. These included: political regime types (democracies, autocracies and anocracies/hybrid regimes); systems of government (six 'pure' types plus atypical systems); and institutional designs (three 'pure' types plus atypical systems). Correlation testing was conducted for both systems of government and institutional designs.[3]

3 The research design deliberately excludes conventional control variables such as GDP, military expenditure or alliance membership. This choice reflects the explicitly descriptive and exploratory nature of the analysis and its focus on identifying empirical regularities and correlations between political regime types, institutional designs and war-related behaviour, rather than on establishing causal relationships or testing specific causal mechanisms. Incorporating economic or alliance variables would shift the analysis toward different causal pathways and modelling strategies, thereby obscuring the independent descriptive role of political and institutional factors that constitute the core analytical focus of this study. Alliance membership, in particular, raises distinct analytical challenges. While alliances may shape resource availability, burden-sharing and military outcomes, the sovereign decision to initiate or join wars remains primarily structured by domestic political and institutional arrangements. At the same time, alliance structures may operate as confounding factors, jointly influencing both political and institutional characteristics and conflict-related outcomes. For this reason, political regime type and institutional design are treated as the core analytical variables, while classification schemes and alternative specifications are used to assess the stability of observed patterns rather than supplemented by conventional control variables. More broadly, several well-known threats to causal inference are acknowledged. These include potential confounding by economic capacity, military capabilities, geopolitical context or regional security environments; coalition dependence in multilateral wars, where outcomes are shaped by collective action rather than by the attributes of individual states; and the possible endogeneity of political regimes and institutional designs to broader historical and strategic dynamics associated with armed conflict. These limitations define the scope of the present contribution.

The evaluation proceeded in two stages. First, systems were assessed within the framework of political regime typology. Second, an independent assessment was made to disentangle the effects of regime type from those of institutional design. The statistical analysis covered the propensity – or lack thereof – of different regimes, systems of government and institutional designs to initiate or participate in wars in 1919–2020. The primary aim was to assess the interdependencies between institutional design and war outcomes, and to determine whether statistically significant relations exist. For this purpose, only cases meeting the previously defined thresholds were included. The identification of war initiators followed the methodology of Sarkees (2010: 29) and Wayman (Sarkees & Wayman 2010). In this framework, the state that first launches an armed attack on the territory or forces of its adversary is considered the initiator of the war.

In creating the bespoke dataset, particular attention was devoted to ensuring transparency of procedures and consistency of coding rules, so that the correlational analysis would not be undermined by discrepancies across sources. First, conflicting entries across used datasets were reconciled according to the principle of prioritising the most comprehensive and empirically verified source. For instance, the Correlates of War (n.d.) project was used for dates and core factual information about wars, while the Major Episodes of Political Violence (Center for Systemic Peace 2020) and International Crisis Behavior (Duke University 2020) projects were employed additionally to refine specific parameters. For political regime classification, the Polity IV/V dataset (Marshall & Gurr 2020) served as the primary source, given its broad temporal and geographical coverage, while the Freedom in the World dataset (Freedom House, n.d.) was used as supplementary evidence or in cases where Polity data were missing.

Second, different projects and datasets exhibited predominant overlap, and when discrepancies did arise, additional verification was undertaken using historical accounts and specialised scholarly studies. Where data were unavailable, the closest preceding or subsequent observations for the same country were used, or in rare cases, functionally comparable cases from similar contexts. However, this applied mainly to systems of government or institutional designs rather than political regime scores. For political regime data (such as democracy and autocracy scores) and war data (including initiators, participants and outcomes), priority was generally given to those datasets that provided the longest temporal coverage or the broadest geographical scope. Accordingly, all other parallel sources were used as supplementary rather than primary data. Political regimes were always coded strictly on the basis of established datasets, whereas

Rather than offering causal explanations, the study provides a systematic mapping of underexplored patterns across a large historical sample, establishing a descriptive baseline that can inform and guide future, more causally oriented research.

institutional designs and systems of government were coded entirely through the authors' methodology (as outlined above).

Third, for institutional designs and systems of government, all 'pure' types were always coded as distinct categories across all calculation scenarios. However, atypical systems were treated using a consistent three-scenario procedure: a) in the first scenario (three types plus atypical systems), they were coded as a separate category alongside the 'pure' types; b) in the second scenario (three types excluding atypical systems), they were not coded but alternatively removed from the analysis; and c) in the third scenario (three types with atypical systems recategorised between the former), they were reclassified into the nearest 'pure' type according to actual political practice, based on empirical evidence. The same algorithm was consistently applied to all cases, both under the six-type and three-type classification schemes for institutional designs and systems of government.

Data and results: Comparative and statistical analysis of wars under different political regimes and institutional designs

The analysis was conducted in three sequential phases, covering both global and regional contexts. The first phase examined the political and institutional factors associated with the outbreak of wars. The second analysed the level of participation in wars, while the third assessed their outcomes. Global patterns were considered first, followed by regional and national contexts.

The findings show no statistically significant relations between the propensity to initiate wars and the type of system of government or institutional design across any of the samples or classification approaches. This result is supported by correlation calculations (see Tables 1 and 5). At the same time, parliamentary and parliamentarised political systems – parliamentary republics and parliamentary monarchies – emerge as the most frequent non-initiators of wars. Their strong parliamentary oversight and control over the executive appear to reduce incentives for governments to start wars. A notable gap nevertheless exists between initiators and non-initiators within parliamentary systems, especially when compared with other institutional types. Furthermore, parliamentary and parliamentarised systems display a higher likelihood of becoming sites of warfare than other systems of government.

However, the study's findings should be interpreted with caution given their inherent limitations. Theoretically, the results remain partial and conditional, shaped by limitations of the analytical methodology applied. They focus specifically on armed conflicts or wars, whereas such phenomena do not characterise states that consistently abstain from warfare. Accordingly, the observations and conclusions are contingent upon the chosen empirical perspective and methodological design. Furthermore, it is important to emphasise that a parlia-

mentary or parliamentarised system of government does not necessarily equate to parliamentary democracy. Many autocratic and hybrid political regimes also operate within parliamentary or parliamentarised frameworks.

Table 1: Initiation and non-initiation of wars by different systems of government and institutional designs, global overview (1919–2020)

System of government / Institutional desig$_n$	Initiator, #	Non-initiator, #	Initiator, #	Non-initiator, #
Classification of systems of government into 6 types				
Type of system of government	6 'pure' types of systems of government + atypical systems		6 types of systems of government with reclassification of atypical systems	
Parliamentary republic	19	27	33	40
Presidential republic	10	13	11	15
Semi-presidential republic	5	7	8	10
Dualistic monarchy	9	6	10	7
Absolute monarchy	0	4	1	4
Parliamentary monarchy	5	9	5	9
Atypical system	20	19	–	–
In total	68	85	68	85
	153		153	
Classification of institutional designs into 3 types				
Type of institutional design	3 'pure' types of institutional design + atypical systems		3 types of institutional design with reclassification of atypical systems	
Predominance of the parliament	24	35	38	47
Predominance of the head of state	19	23	23	27
Mixed/balanced	5	7	7	11
Atypical system	20	20	–	–
In total	68	85	68	85
	153		153	

Source: Authors, partly based on the Center for Systemic Peace (2020), the Comparative Constitutions Project (n.d.), the Constitute Project (n.d.), the Correlates of War project (n.d.), Duke University (2020), Elgie (2011), Elkins & Ginsburg (2022), the International IDEA Project (n.d.), Osadchuk & Lytvyn (2023), Presidential Power (n.d.), Semi-Presidential One (n.d.), Shugart and Carey (1992)

A more detailed examination of the aggregate number of participants in wars worldwide between 1919 and 2020 reveals additional statistical significance

Table 2: Participation in wars by different systems of government and institutional designs, global overview (1919–2020)

System of government / Institutional design	Number of participants, #	Number of participants, #
Classification of systems of government into 6 types		
Type of system of government	6 'pure' types of systems of government + atypical systems	6 types of systems of government with reclassification of atypical systems
Parliamentary republic	46	73
Presidential republic	23	26
Semi-presidential republic	12	18
Dualistic monarchy	15	17
Absolute monarchy	4	5
Parliamentary monarchy	14	14
Atypical system	39	–
In total	153	153
Classification of institutional designs into 3 types		
Type of institutional design	3 'pure' types of institutional design + atypical systems	3 types of institutional design with reclassification of atypical systems
Predominance of the parliament	59	85
Predominance of the head of state	42	50
Mixed/balanced	12	18
Atypical system	40	–
In total	153	153

Source: Authors, partly based on the Center for Systemic Peace (2020), the Comparative Constitutions Project (n.d.), the Constitute Project (n.d.), the Correlates of War project (n.d.), Duke University (2020), Elgie (2011), Elkins & Ginsburg (2022), the International IDEA Project (n.d.), Osadchuk & Lytvyn (2023), Presidential Power (n.d.), Semi-Presidential One (n.d.), Shugart and Carey (1992)

(see Table 2). Parliamentary and parliamentarised systems – specifically parliamentary republics and parliamentary monarchies – stand out as the dominant participants across all other types of institutional design. This pattern holds regardless of the classification logic employed, whether based on six or three categories. By contrast, all other institutional designs and systems of government display considerably lower levels of participation in warfare. These findings suggest that the form of institutional design, as a reflection of the type of political system, does not substantially affect the likelihood of initiating wars.

Table 3: Outcomes of wars by different systems of government and institutional designs, global overview (1919–2020)

System of government / Institutional design	Victory, #	Draw, #	Defeat, #	Victory, #	Draw, #	Defeat, #
Classification of systems of government into 6 types						
Type of system of government	6 'pure' types of systems of government + atypical systems			6 types of systems of government with reclassification of atypical systems		
Parliamentary republic	20	14	12	29	20	24
Presidential republic	8	5	10	8	6	12
Semi-presidential republic	5	3	4	5	6	7
Dualistic monarchy	4	4	7	5	4	8
Absolute monarchy	3	0	1	3	0	2
Parliamentary monarchy	11	1	2	11	1	2
Atypical system	10	10	19	–	–	–
In total	61	37	55	61	37	55
	153			153		
Classification of institutional designs into 3 types						
Type of institutional design form	3 'pure' types of institutional design + atypical systems			3 types of institutional design with reclassification of atypical systems		
Predominance of the parliament	31	14	14	39	21	25
Predominance of the head of state	15	9	18	17	10	23
Mixed/balanced	5	3	4	5	6	7
Atypical system	10	11	19	–	–	–
In total	61	37	55	61	37	55
	153			153		

Source: Authors, partly based on the Center for Systemic Peace (2020), the Comparative Constitutions Project (n.d.), the Constitute Project (n.d.), the Correlates of War project (n.d.), Duke University (2020), Elgie (2011), Elkins & Ginsburg (2022), the International IDEA Project (n.d.), Osadchuk & Lytvyn (2023), Presidential Power (n.d.), Semi-Presidential One (n.d.), Shugart and Carey (1992)

Instead, states with strong parliaments – and therefore relatively weak heads of state – show a marked propensity to become involved in wars, compared to other political systems. As a result, parliamentary and parliamentarised systems are statistically more likely both to initiate and engage in wars and to sustain involvement in ongoing hostilities.

Table 4: Initiation and outcomes of wars by political regime types (Polity IV/V data), global overview (1919–2020)

Initiation / Outcomes	Democratic states	Anocratic/hybrid states	Autocratic states
Initiation of wars			
Initiator, #	18	15	29
Non-initiator, #	22	21	33
In total	40	36	62
	138		
Outcomes of wars			
Victory, #	27	8	20
Draw, #	7	9	17
Defeat, #	6	19	25
In total	40	36	62
	138		

The Polity IV/V project does not provide a clear assessment of several countries in the war sample (e.g., Kingdom of Greece 1919, Turkey 1919, Peru 1932, Republic of China 1937, France/Vichy Republic 1941, Thailand 1941, Pakistan 1947, 1965, 1971, India 1947, Singapore 1963, South Vietnam 1965, Chad 1986, Republic of Bosnia and Herzegovina 1992). The aggregate figures in Table 4 therefore exclude these cases. Source: Authors, partly based on the Center for Systemic Peace (2020), the Correlates of War project (n.d.), Duke University (2020), Freedom House (n.d.), Marshall & Gurr (2020)

A comparative analysis of interstate war outcomes across different institutional designs and systems of government reveals several noteworthy patterns. The results show partial but consistent statistical significance, remaining robust and valid regardless of whether the classification distinguishes six or three types of institutional design. A comprehensive review of interstate wars from 1919 to 2020 demonstrates a clear correlation between parliamentary systems of government, or cases of parliamentary predominance (formal or de facto), and a greater likelihood of achieving victory in military conflicts compared to defeats or draws. This finding, supported by the detailed statistical analyses in Table 3, contrasts with the outcomes observed in states operating under alternative institutional arrangements. It also reinforces the prevailing consensus in political science and international relations that democracies tend to be more successful in war than autocracies. Remarkably, this tendency is particularly evident in states with parliamentary or parliamentarised institutional designs. Taken together, the evidence indicates that statistically significant relations are concentrated in parliamentary and parliamentarised systems.

Moreover, the results of this study reinforce the theoretical conclusions outlined above, supported by a substantial body of indirect and recurrent evidence. Specifically, the findings indicate no statistically significant relations between the initiation of interstate wars and the type of political regime – whether democratic, anocratic/hybrid or autocratic – with the partial exception of au-

tocracies, which display a comparatively higher number of participants. By contrast, a statistically significant correlation emerges between war outcomes and political regime types. Between 1919 and 2020, democracies were more likely to secure victory and less likely to suffer defeat than autocracies (see Table 4). These results align with scholarly arguments within the framework of democratic peace theory, which holds that democracies are more prone to achieving favourable outcomes in warfare. This tendency is particularly pronounced in states with parliamentary or parliamentarised institutional designs, which are predominantly characteristic of democratic regimes rather than autocratic ones.

To validate our findings, we conducted Spearman's rank correlation analysis on all variables. This comprehensive statistical assessment examined the relations between dependent and independent variables, confirming our earlier conclusions whilst revealing additional patterns and aspects. The correlation analysis found no statistically significant associations between systems of government, institutional designs or political regimes and the propensity to initiate wars in 1919–2020 (see Table 5).

Table 5 confirms the absence of statistically significant correlations between the 'Initiator' variable and other analytical variables. However, three important trends emerged from the analysis. First, consistent with established research in political science and international relations, democratic regimes show higher probabilities of achieving victory in wars compared to non-democratic regimes. Second, this study reveals a novel correlation between institutional design or system of government and war outcomes: Countries with parliamentary or parliamentarised systems – particularly parliamentary republics and monarchies – demonstrate higher success rates in wars than those with alternative governance structures. Third, combining these findings, the data indicate that parliamentary democracies (democratic parliamentary or parliamentarised systems) are most likely to prevail in wars (see Table 5).

The robustness of these findings was assessed in relation to the main research design and methodological choices discussed above. Adjusting selection parameters, including the use of more restrictive fatality or personnel thresholds and alternative participant-selection rules, affects the size of the analytical sample but does not alter the core descriptive patterns observed in the results. In particular, the overall distribution of war initiation across political regime types and institutional designs remains stable across reasonable parameter variations. Likewise, the comparatively higher success rates observed for parliamentary and parliamentarised systems persist, especially when these institutional designs are combined with democratic political regimes. These findings should therefore be interpreted as regularities rather than artefacts of specific coding or selection choices.

The findings provide a comprehensive analysis of global trends in political and institutional factors affecting war initiation, participation and outcomes across

Table 5: Correlations between war initiation/outcomes and systems of government/institutional designs (six- and three-type classifications) by political regime types/levels (1919–2020)

Spearman Rank Order Correlations (Data++)
MD pairwise deleted
Marked correlations are significant at p <,05000

	Initiation	Victory_ Defeat	6 types + atypical	6 types – atypical	6 types	3 types + atypical	3 types – atypical	3 types	Polity, score	Polity, type
Initiation	1,000000	-0,039717	0,041121	-0,016055	-0,004438	0,031642	-0,042204	-0,005020	-0,036579	-0,021598
Victory_Defeat	-0,039717	1,000000	-0,068447	0,112691	0,088411	-0,044616	0,191821	0,156837	0,231996	0,248504
6 types + atypical	0,041121	-0,068447	1,000000	0,967755	0,688102	0,964677	0,933996	0,615345	-0,365543	-0,382571
6 types – atypical	-0,016055	0,112691	0,967755	1,000000	0,951153	0,886993	0,886993	0,886993	0,172545	0,147348
6 types	-0,004438	0,088411	0,688102	0,951153	1,000000	0,637706	0,910467	0,916529	-0,020329	-0,047830
3 types + atypical	0,031642	-0,044616	0,964677	0,886993	0,637706	1,000000	1,000000	0,636885	-0,361827	-0,386656
3 types – atypical	-0,042204	0,191821	0,933996	0,886993	0,910467	1,000000	1,000000	1,000000	0,244631	0,202977
3 types	-0,005020	0,156837	0,615345	0,886993	0,916529	0,636885	1,000000	1,000000	0,064018	0,024465
Polity, score	-0,036579	0,231996	-0,365543	0,172545	-0,020329	-0,361827	0,244631	0,064018	1,000000	0,936194
Polity, type	-0,021598	0,248504	-0,382571	0,147348	-0,047830	-0,386656	0,202977	0,024465	0,936194	1,000000

Source: Authors, partly based on the Center for Systemic Peace (2020), the Comparative Constitutions Project (n.d.), the Constitute Project (n.d.), the Correlates of War project (n.d.), Duke University (2020), Elgie (2011), Elkins & Ginsburg (2022), Freedom House (n.d.), the International IDEA Project (n.d.), Marshall & Gurr (2020), Osadchuk & Lytvyn (2023), Presidential Power (n.d.), Semi-Presidential One (n.d.), Shugart and Carey (1992).

different political regime types, institutional designs and systems of government. To further substantiate these patterns, we examine the data through regional analysis. Regional analysis can reveal specific conflict dynamics and the geographical distribution of different institutional designs and systems of government.

We segmented the world into four analytical regions: Asia, Africa, Europe and the Americas (combined with Australia and Oceania). The Americas were combined with Australia and Oceania due to insufficient case numbers for separate analysis. The regional data employ the same analytical methods and calculation algorithms as the global analysis, ensuring consistency. Table 6 presents regional patterns of war initiation, confirming that parliamentary republics and parliamentary monarchies, as parliamentary or parliamentarised political systems, show higher rates of war participation than other institutional designs. This pattern holds across most regions, indicating that parliamentary and parliamentarised systems exhibit the greatest disparity between war initiation and non-initiation compared to alternative systems of government.

Regional analysis of war outcomes also reveals that parliamentary and parliamentarised systems show the highest rates of participation in all outcome categories – victories, defeats and draws – but generally achieve more victories than other institutional designs. However, important regional variations exist. In Africa, parliamentary systems show higher rates of defeats and draws. In Asia, victories of parliamentary and parliamentarised systems are not significantly higher than defeats and draws. By contrast, Europe shows a marked pattern where parliamentary systems achieve significantly more victories than defeats. The Americas present a different picture entirely, with minimal presence of parliamentary systems and predominant presidential systems, which explains the distinct regional patterns.

A regional statistical comparison of war initiation and outcomes by regime type further refines the global picture. Overall, the regional results align with the trends identified in the worldwide analysis: Autocracies are more frequently involved in wars and are the most likely initiators, a pattern evident in nearly all regions. However, political and social indicators point to a divergent pattern in South and North America, Australia and Oceania, where democracies display a higher tendency to engage in wars. At the same time, analysis of outcomes reveals that democratic states – especially in Europe, the Americas, Australia and Oceania – show a significantly greater likelihood of victory in warfare. By contrast, autocracies both globally and regionally tend to suffer defeat. These findings are presented in Table 7.

Consequently, the regional findings reinforce the general global trends and conclusions. In most regions of the world, the initiation of wars is frequently associated with parliamentary or parliamentarised systems of government, which also display the highest levels of participation and success in warfare. A closer examination of war records shows that states with the strongest records of military victories are predominantly democracies, especially those in Europe, North America, Oceania and Australia. A large share of parliamentary or parliamentarised systems with high democratic scores are concentrated in Europe, further strengthening this pattern.[4] These observations both influence and reflect national frameworks and the contexts of interstate wars.

The contemporary relevance of these findings is evident in the ongoing war in Ukraine. The war was initiated by Russia, an autocratic regime with a presidentialised institutional design, whereas Ukraine initially sought to reduce the intensity of hostilities. At the outbreak of full-scale war, Ukraine combined democratic and autocratic features, but its democratic indicators declined as the war intensified – an outcome that can be considered an objective consequence of

4 These regional findings help mitigate concerns about temporal and geographical clustering. While parliamentary or parliamentarised systems were indeed concentrated in Europe during high-conflict periods, similar patterns of war participation appear in other regions and time frames, suggesting that the associations are not solely artifacts of European history, particularly between 1919–1945.

Table 6: Initiation and outcomes of wars by different systems of government and institutional designs, regional

System of government / Type of institutional design	Initiator, #	Non-initiator, #	Initiator, #
	EUROPE		AFI
			INITIATION AND NON-
			Classification into 6 types (with re
Parliamentary republic	9	13	8
Presidential republic	1	1	0
Semi-presidential republic	4	7	2
Dualistic monarchy	3	1	0
Absolute monarchy	1	0	0
Parliamentary monarchy	3	4	0
In total	21	26	10
	47		2
Classification into 3 types (with reclassification of atypical systems)			
Predominance of the parliament	12	17	8
Predominance of the head of state	6	2	0
Mixed/balanced	3	7	2
In total	21	26	10
	47		2

	Victory, #	Draw, #	Defeat, #	Victory, #	Dra
					OUTCOMES
					Classification into 6 types (with re
Parliamentary republic	11	5	6	2	1
Presidential republic	0	0	2	2	0
Semi-presidential republic	5	2	4	0	2
Dualistic monarchy	2	0	2	0	2
Absolute monarchy	0	0	1	2	0
Parliamentary monarchy	7	0	0	0	0
In total	25	7	15	6	1
	47				2
					Classification into 3 types (with re
Predominance of the parliament	18	5	6	2	1
Predominance of the head of state	2	0	6	4	2
Mixed/balanced	5	2	3	0	2
In total	25	7	15	6	1
	47				2

Geopolitically, Europe includes countries such as Armenia, Azerbaijan, Georgia, the Republic of Cyprus, and Turkey. So
Constitute Project (n.d.), the Correlates of War project (n.d.), Duke University (2020), Elgie (2011), Elkins & Ginsburg (2022)
Shugart and Carey (1992)

l overview (1919–2020)

Non-initiator, #	Initiator, #	Non-initiator, #	Initiator, #	Non-initiator, #
RICA	**ASIA**		**AMERICAS + AUSTR. + OC.**	
-INITIATION OF WARS				
classification of atypical systems)				
2	16	22	0	1
3	2	4	8	9
2	1	1	1	0
3	7	3	0	0
2	0	2	0	0
0	1	2	1	3
12	27	34	10	13
22	61		23	
2	17	24	1	4
7	9	9	8	9
3	1	1	1	0
12	27	34	10	13
22	61		23	

S OF WARS							
w, #	Defeat, #	Victory, #	Draw, #	Defeat, #	Victory, #	Draw, #	Defeat, #
classification of atypical systems)							
3	6	14	12	12	1	0	0
0	0	0	2	4	7	4	6
2	2	0	1	1	0	1	0
2	1	3	2	5	0	0	0
0	0	1	0	1	0	0	0
0	0	1	1	1	3	0	1
7	9	19	18	24	11	5	7
22		61			23		
classification of atypical systems)							
3	5	15	13	13	4	0	1
2	1	4	4	10	7	4	6
2	3	0	1	1	0	1	0
7	9	19	18	24	11	5	7
22		61			23		

ource: Authors, partly based on the Center for Systemic Peace (2020), the Comparative Constitutions Project (n.d.), the , the International IDEA Project (n.d.), Osadchuk & Lytvyn (2023), Presidential Power (n.d.), Semi-Presidential One (n.d.),

Table 7: Initiation and outcomes of wars by political regime types (Polity IV/V data), regional overview (1919–2020)

Initiation / Outcomes of Wars		Democratic states	Anocratic/hybrid states	Autocratic states
EUROPE	**Initiation of interstate wars**			
	Initiator, #	8	4	7
	Non-initiator, #	10	7	6
	In total	18	11	13
		42		
	Outcomes of interstate wars			
	Victory, #	13	3	7
	Draw, #	2	2	2
	Defeat, #	3	6	4
	In total	18	11	13
		42		
AFRICA	**Initiation of interstate wars**			
	Initiator, #	1	0	9
	Non-initiator, #	0	4	7
	In total	1	4	16
		21		
	Outcomes of interstate wars			
	Victory, #	0	2	3
	Draw, #	1	1	5
	Defeat, #	0	1	8
	In total	1	4	16
		21		
ASIA	**Initiation of interstate wars**			
	Initiator, #	4	8	12
	Non-initiator, #	5	7	17
	In total	9	15	29
		53		
	Outcomes of interstate wars			
	Victory, #	7	1	8
	Draw, #	2	3	10
	Defeat, #	0	11	11
	In total	9	15	29
		53		

Initiation / Outcomes of Wars		Democratic states	Anocratic/hybrid states	Autocratic states
AMERICAS + AUSTRALIA + OCEANIA	**Initiation of interstate wars**			
	Initiator, #	5	3	1
	Non-initiator, #	7	3	3
	In total	12	6	4
		22		
	Outcomes of interstate wars			
	Victory, #	7	2	2
	Draw, #	2	3	0
	Defeat, #	3	1	2
	In total	12	6	4
		22		

As with Table 4, the Polity IV/V project does not provide political regime assessment for several cases in the war sample. These cases are excluded from the aggregate figures in Table 7
Geopolitically, Europe includes countries such as Armenia, Azerbaijan, Georgia, the Republic of Cyprus, and Turkey.
Source: Authors, partly based on the Center for Systemic Peace (2020), the Correlates of War project (n.d.), Duke University (2020), Freedom House (n.d.), Marshall & Gurr (2020)

wartime conditions. This process nevertheless produced several advantageous military outcomes for Ukraine, while simultaneously exacerbating foreign policy challenges, particularly the inability to offer concessions to its adversary. Each national case thus reflects broader regional and global patterns, highlighting the importance of political regimes, systems of government and institutional design (as political and institutional factors) in shaping decisions on war or peace.

Generalisation and discussion of political and institutional factors of wars

The study's findings indicate that there is no statistically significant correlation between the frequency of war initiation and the type of system of government – whether parliamentary, presidential or another institutional design. Similarly, the degree of democracy or autocracy within a political regime shows little correlation with the likelihood of initiating wars. Nonetheless, the data reveal a relative predominance of parliamentary and parliamentarised systems compared to presidential and presidentialised systems, as well as other institutional designs. This tendency becomes particularly evident when the number of war-initiating states is assessed independently from the number of non-initiators. The evidence suggests that states with strong parliamentary influence – parliamentary or parliamentarised systems, both institutionally and politically – are

more frequently engaged in wars, either as initiators or participants, than states with alternative institutional configurations.

This trend can be linked to several explanatory factors. First, geography plays a role: Many parliamentary and parliamentarised systems are located in conflict-prone regions such as the Middle East and South Asia. For instance, parliamentary democracies such as India and Israel have repeatedly been involved in wars in these regions. Second, historical legacies and events matter. Between 1919 and 1945, most European republics adopted parliamentary or parliamentarised systems of government, coinciding with a period of heightened warfare. Third, the global proliferation of socialist republics in the early to mid-20th century – formally characterised by parliamentary or quasi-parliamentary designs, though atypical due to distortions in practice – contributed to this pattern. Many of these states exhibited assertive foreign policies, partly attributable to their autocratic political regimes. However, these factors alone cannot provide a sufficient explanation, since the present study covers a much broader temporal and regional scope.[5]

In view of these factors, it is essential to undertake a comprehensive evaluation of the complexities embedded in inter-institutional dynamics across diverse institutional designs and systems of government, with particular emphasis on the analysis of wars. A key assumption is that the involvement of countries with parliamentary or parliamentarised systems in wars is strongly influenced by the constrained dualism of the executive. In all republican and monarchical systems, both the head of state and parliament are present; yet in parliamentary monarchies and republics, the legislature and prime minister often wield more authority than the head of state, especially regarding the initiation and conduct of wars. By contrast, in presidential republics and dualistic monarchies, heads of state exercise substantial executive authority but must still take account of parliamentary positions, particularly in democratic regimes. Semi-presidential systems represent an additional complexity, as presidents, parliaments and prime ministers share significant – sometimes nearly equivalent – powers over policy and executive functions. This intricate distribution of authority has a direct impact on decisions about initiating and pursuing wars. For this reason,

5 Nevertheless, these explanatory factors may raise concerns about potential confounding effects. The observed correlations between parliamentary or parliamentarised systems and war dynamics may partly reflect geographical and temporal clustering rather than institutional causation. Parliamentary systems were indeed concentrated in Europe between 1919 and 1945, a period of exceptionally high interstate wars. This creates a classic confounding problem: Historical timing and regional location, rather than institutional design per se, may explain the statistical associations. Three factors mitigate this concern. First, the analysis covers the full century (1919–2020) and all world regions, extending well beyond the European experience of the early twentieth century. Second, the regional results (see section 4) show that parliamentary systems display higher rates of war participation across multiple contexts, not solely in Europe. Third, and most importantly, this study identifies correlational patterns rather than definitive causal mechanisms. The findings highlight empirical regularities that warrant further investigation through future research.

a careful examination of the respective roles and responsibilities of these key institutions is required.

From this perspective, one can infer that the states with strong parliaments and effective prime ministers – particularly where heads of state or other actors exert limited opposition – may be more inclined to engage in wars. A similar logic applies in presidential and semi-presidential systems where the heads of state command legislative majorities. However, confirming this hypothesis requires further empirical evidence. Complicating the matter is the fact that parliamentary and parliamentarised systems, as well as other institutional designs, are far from homogeneous. Variations in party systems, government formation, legislative support and responsibility mechanisms significantly shape war-related decision-making. As Auerswald (2000: 40–43) demonstrates, single-party majority governments display a higher propensity to initiate wars, as they possess both the capacity and unity to do so. Coalition or minority governments, by contrast, often lack cohesive support from partners or legislative majorities. Yet Prins and Sprecher (1999: 282–284) challenge this view, arguing that coalition leaders may in fact be more inclined to initiate military conflicts, albeit for different reasons. In such contexts, responsibility for outcomes is shared among coalition partners or parliamentary parties, diffusing responsibility and thereby altering the calculus of war decisions.

To gain a deeper understanding of war outcomes, further assumptions, clarifications and generalisations are required. As already noted, the study found that states with parliamentary or parliamentarised systems of government and democratic political regimes are the most frequent victors in wars (see Tables 3 and 5). One explanation lies in existing research on the relations between political regimes and warfare: Democratic leaders are generally more willing to invest significant resources in achieving victory than their autocratic counterparts. In addition, democracies are more likely to form military blocs and alliances, while also benefiting from more advanced economies than autocracies. These factors provide democratic states with stronger resource-based military capacity, which increases their chances of success in war.

At the same time, the reasons why parliamentary and parliamentarised systems of government in democracies outperform other institutional designs remain less clear. The present study shows that alternative systems of government often prove less effective, and in some cases even perform worse than autocratic regimes. From a political and institutional perspective, this may be explained by the fact that presidential and semi-presidential republics, as well as absolute and dualistic monarchies, are frequently characterised by anocratic/hybrid or autocratic political regimes. Within this sample, the United States stands out as the only presidential republic with a consistent record of military victories. A similar exception exists in semi-presidential systems: France's Fifth Republic, which has combined democratic stability with a notable record of military

success. By contrast, most other presidential or semi-presidential states in the dataset were either anocratic/hybrid or autocratic, limiting their effectiveness in warfare. A further unexpected finding concerns absolute monarchies: Those few that proved most successful did so largely through strategic partnerships with democratic states.

Conclusions

The study demonstrates, on a comparative and statistical basis, that parliamentary republics and parliamentary monarchies play a pivotal role in warfare and are most frequently victorious. A recurring pattern is the presence of a parliamentary or parliamentarised institutional design, where legislatures exercise predominant influence over the formation, operation and responsibility of governments. At the same time, the evidence indicates that states with strong parliaments are also the most frequent initiators of wars. Conversely, nations with powerful heads of state or with a more balanced distribution of authority among institutions, particularly influencing governments, show a markedly lower propensity to engage in wars or to achieve victory once involved.

Taken together, these findings suggest that states combining parliamentary predominance with democratic political regimes are most likely to emerge as victors in wars. At the same time, the study finds no statistically significant correlations between war initiation or participation and the type of system of government, institutional design or political regime. In this respect, the results broadly align with democratic peace theory, except for the question of initiation. More generally, the analysis indicates that inter-institutional relations are indeed a relevant factor in explaining wars. However, they must be considered in conjunction with the type of political regime if their role in war initiation, participation and outcomes is to be fully understood.

It must be stressed that this conclusion remains contingent on a range of political and institutional factors, including inter-institutional relations and political systems. These factors may either restrain or intensify a state's decision to wage war, and they also shape the conduct and outcomes of wars once they begin. In summary, the study has examined the initiation, participation and outcomes of wars under different political regimes, institutional designs and systems of government. Yet this analysis represents only one dimension of a much broader explanatory landscape. Wars are driven by multiple causes and factors that extend well beyond political or institutional arrangements, including economic structures, alliance memberships, military capabilities, geographical conditions and historical legacies. The present research deliberately isolates the influence of systems of government and regime types in order to establish their independent effects with greater analytical precision. Future studies could profitably explore how these political and institutional factors

interact with economic and structural determinants, thereby offering a more comprehensive account of the causes and consequences of war.

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Gender Quotas and Women's Access to Viable List Positions: Evidence from the European Parliament Elections in Poland

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Abstract: *The article contributes to the scholarly work on factors influencing women's parliamentary representation by exploring the relationship between gender, gender quotas and the assignment of electorally viable list positions. Drawing on the insights from the existing scholarly work and feminist institutional literature, I investigate the impact of the introduction of legislated gender quotas in Poland in 2011 on the distribution of winnable positions on electoral lists in the European Parliament (EP) elections. I also analyse the role of incumbency advantage and national political experience in this regard, examining heterogenous effects between female and male candidates. The regression analysis relies on the original individual-level dataset created for this article, encompassing all EP elections in Poland to date (2004–2024).*

I find a negative relationship between female gender and the allocation of viable list position, suggesting a possible gender bias of party selectorates. This bias diminishes when accounting for incumbency and national political experience, implying that women's underrepresentation in winnable list positions is largely attributed to the unequal, gendered distribution of political and electoral capital. National political experience and incumbency advantage emerge as critical factors in the assignment of secure ballot spots, benefiting both male and female candidates equally.

Keywords: ***women's representation, European Parliament, gender, descriptive representation, gender quotas, Poland***

Introduction

The European Parliament (EP) has long been identified as an assembly more open to women's political participation than many of the national parliaments in the member states (MSs) of the European Union (EU) (Dingler & Fortin-Rittberger 2022; Freedman 2002; Pacześniak 2006). The proportion of women members of the European Parliament (MEPs) since the first EP elections in 1979 has been consistently higher than aggregated EU averages of women in national parliaments (Fortin-Rittberger & Rittberger 2014a). However, women remain descriptively underrepresented in the EP and full parity has never been achieved. The highest percentage of women MEPs was reached after the 2019 elections at 41% and is currently at 39%.

Poland is one of the eleven Central and Eastern European (CEE) EU member states. Despite their diversity, CEE MSs exhibit similar characteristics with regard to women's political representation: under-representation in legislatures, marginalisation in public debate and policymaking, persistence of gender stereotypes about traditional family roles and resistance to gender quotas (Chiva 2018; Chiva 2019). Poland's first elections to the EP took place in 2004 – the year of the country's accession to the EU. Similarly to other post-communist states, Polish women's national and European parliamentary representation is below the European average (29.4% of women MPs in the Sejm after the 2023 national elections and 28.3% women MEPs after the 2024 EP elections).

To remedy the low levels of women's political representation, in 2011 Poland adopted legislation imposing mandatory 35% gender quotas. Polish quota arrangements apply to district-level party lists. According to the Electoral Code of 5 January 2011, 'in the list of candidates: the number of candidates – women must not be less than 35% of the number of all candidates on the list; the number of candidates – men must not be less than 35% of the number of all candidates on the list' (Electoral Code 2011, Article 211 § 3). Polish quotas are strongly enforced: If a list does not fulfil the quota requirement, electoral authorities will not register it. The new quota regulations were first implemented in the 2011 national parliamentary elections. The outcomes were modest: compared with the previous parliamentary elections in 2007, the number of female candidates on electoral lists doubled, yet the percentage of women elected increased by only three percentage points. The first EP elections after the adoption of the quota bill took place in 2014. The percentage of women on the lists more than doubled, but similarly to the national parliamentary elections, the share of women MEPs from Poland increased only by two percentage points (from 22 to 24%).

Poland provides an interesting case study due to several characteristics. It is one of four CEE member states employing national-level gender quotas in

the EP elections (along with Croatia, Romania and Slovenia). At the same time, Poland is one of only four member states that have divided their territories into multiple constituencies (others are Belgium, Ireland and Italy). In the majority of EU member states, there is a single nation-wide electoral constituency for the EP elections. Poland is divided into 13 constituencies. In the 2024 elections, there were 53 MEPs to be elected (54 MEPs in 2004, 50 in 2009, 51 in 2014 and 52 in 2019), which gives on average only four successful candidates per constituency. In practice, this means that it is very rare for a political party to have more than one candidate elected from one constituency. For comparison, there are 460 MPs in the Polish lower chamber, the Sejm, and there are 41 constituencies in the elections to the Sejm, which gives, on average, 11 MPs elected per constituency (district magnitude varies from 7 to 20 seats). The EP elections in Poland therefore provide an interesting and unexplored electoral set-up to examine the ballot position effect (described by, among others, Blom-Hansen et al. 2016; Gendźwiłł & Żółtak 2020; Lutz 2010; Marcinkiewicz 2014).

The impact of gender quotas on women's representation in the Sejm has received considerable scholar attention (Gendźwiłł & Górecki 2023; Gendźwiłł & Żółtak 2020; Górecki & Kukołowicz 2014; Górecki & Pierzgalski 2021; Gwiazda 2015; Gwiazda 2017; Jankowski & Marcinkiewicz 2019; Millard 2014; Śledzińska-Simon 2018). No similar analyses have yet been conducted with regard to the EP elections in Poland. This article attempts to fill this research gap. I examine if women were underrepresented in viable list positions in the 2004–2024 EP elections in Poland and whether the introduction of legislated gender quotas in 2011 alleviated or exacerbated this issue. I also analyse the role of incumbency advantage and national political experience (electoral capital) in allocation of the most coveted list positions and the heterogeneity of the effect between men and women candidates. The regression analysis is based on the original individual-level dataset created for this article (Polak 2025a). The dataset covers all European Parliament elections in Poland to date (2004–2024).

I find a negative relationship between female gender and the allocation of viable list position, suggesting a possible gender bias of party selectorates. This bias disappears when incumbency and national political experience are taken into account, indicating that women's underrepresentation in winnable list positions is largely due to the unequal, gendered distribution of political and electoral capital. Importantly, the gender quotas in the EP elections in Poland do not appear to be related either positively or negatively to women's access to viable political candidacy. National political experience and incumbency advantage are key factors contributing to the safe ballot spots assignment, and women and men benefit from these factors to the same extent.

Gendered patterns of political selection

Gender and political candidacy

Candidate selection process is an interactive mechanism, where both potential, aspiring candidates (the supply) and selectors (i.e. party gatekeepers, the demand side) influence the outcomes of the selection process. Norris and Lovenduski (1995) demonstrated that both supply side and demand side of the political recruitment process need to be considered in order to understand women's underrepresentation in politics. From the supply side, women – for various reasons, including historical inequalities, deep-seated stereotypes and gendered division of work – might be reluctant to enter politics, or actively discouraged from doing so. On the demand side, a male-dominated party selectorate might hinder, or at least not support, female candidacies. To facilitate the analysis of the supply and demand model, Norris and Lovenduski created a 'ladder of recruitment' that identifies the subsequent recruitment stages at which candidates are gradually eliminated. In the extended version of the ladder (see Lovenduski 2016: 521), the final steps of the ladder before being elected to office is 'candidate safe seat or list position'. This step is the focus of this article.

Feminist institutionalist literature highlights the gendered dimension of the distribution of electoral list positions and its role in the persistence of women's political underrepresentation despite various positive actions towards gender equality (Bjarnegård 2013; Bjarnegård & Kenny 2015; Bjarnegård & Kenny 2016; Kenny 2013; Kenny & Verge 2016; Polak 2025b). Persistent gendered hierarchies and gendered power networks result in often predominantly male-dominated candidate selection processes. Parties are the key gatekeepers on a way to parliamentary mandates responsible for recruiting candidates for parliamentarians, constructing and shaping electoral lists, and promoting candidates. They have almost exclusive control over which candidates are recruited and selected. Political parties have historically been dominated by men and consequently are often characterised by – frequently unacknowledged – traditional conceptions of gender relations that might (although it is not a universal principle) disadvantage women's electoral opportunities.

This mechanism results in placing women in 'no-hope' list positions where they have little chance of winning (Bjarnegård & Kenny 2015; Franceschet & Piscopo 2014; Piscopo 2016). Women candidates are frequently overrepresented in unwinnable positions on an electoral list as party gatekeepers use the lower, electorally hopeless places on electoral lists for producing a balanced ticket (Luhiste 2015). Kunovich (2003) found that regardless of their political experience and party affiliation, women in both Poland and the Czech Republic were substantially less likely to secure the first list position and moderately less likely to attain other top positions. Gendźwiłł and Żółtak (2020) demonstrated that

Polish party elites exhibit gender bias in ballot-ranking patterns. No similar analyses have been done heretofore with regard to the European Parliament elections. I assume that women are underrepresented in viable list positions on electoral lists to the European Parliament. I test a hypothesis as follows:

H1: *Female gender variable is negatively correlated with viable positions on electoral lists to the European Parliament.*

Quota and its discontents

In order to counteract women's political underrepresentation, many countries around the world adopted gender quotas. Quotas are constitutional provisions or national laws that require political parties to include a certain percentage of women on party ballots. While quotas are sometimes described as a 'fast track' mechanism for increasing women's representation, their actual effectiveness has been disputable (Schwindt-Bayer 2009, Dahlerup 2005). The presence of national legislated quotas has been linked to higher proportions of women on electoral lists in elections to the European Parliament (Aldrich 2020; Fortin-Rittberger & Rittberger 2014a; Fortin-Rittberger & Rittberger 2014b). However, this has not consistently translated into an increase in the share of elected female officials. Cross-national comparative analyses have not found any statistically significant impact of quotas in increasing the percentage of women MEPs elected and in explaining the variation in MEP gender balances between member states (Lühiste & Kenny 2016; Polak & Lewandowski 2025; Stockemer 2007; Xydias 2016). Feminist institutionalist literature highlights the role of informal practices of subverting quota regulations (Bjarnegård & Kenny 2015). In many instances, political parties have circumvented the intent of quotas by placing women in unfavourable positions that are unlikely to result in electoral success (Aldrich & Daniel 2020). Kenny and Verge (2016: 363) note that:

> in cases of quotas that do not have placement mandates, parties typically place women in hopeless seats or list positions, keeping the lion's share of safe seats and winnable positions for male incumbents or male newcomers, which erodes the transformative potential of gender quotas. (Kenny & Verge 2016: 363)

The 'paradox of gender quotas' suggests that while quotas facilitate women's entry into politics and through the first steps of the ladder of recruitment, it makes the final stages of the ladder more challenging due to competing with a greater number of female co-runners and a possibility of vote-splitting (Gendźwiłł & Górecki 2023; Gendźwiłł & Żółtak 2020; Górecki 2021; Górecki & Kukołowicz 2014; Jankowski & Marcinkiewicz 2019). Górecki and Kukołowicz (2014) demonstrated that the increase in the number of female candidates to the lower chamber of the parliament (the Sejm) brought about by gender quotas was accompanied by

a decrease in the average female candidate's chances of being elected. Aldrich and Daniel (2025) in their cross-national panel analysis of gender quotas in the European elections found that legislative quotas were in fact negatively associated with women becoming list leaders. There was no significant relationship between legislated quotas and the share of women being placed in the top ten percent or the top 25 percent of the election list (Aldrich & Daniel 2025: 87).

The absence of placement mandates in Poland's gender quota legislation and weak commitment among party elites to the idea of quotas have been suggested as key reasons behind the low effectiveness of gender quotas in Poland (Górecki & Pierzgalski 2021; Millard 2014). The distribution of rewards (including easily winnable positions on electoral lists) by predominantly male party elites is often characterised by the exclusion of women, which can be attributed to the influence of stereotypes and the out-group effect (Gendźwiłł & Żółtak 2020; Niven 1998). In this context, gender quotas are often circumvented by placing women in unwinnable ballot positions, as formal quota regulations are not enough to overturn the informal centres of male power within party elites (Bjarnegård & Kenny 2015; Verge & de la Fuente 2014).

Flis (2014) showed that after the first application of gender quotas in Poland during the 2011 national parliamentary elections, the average ballot rank of a female candidate was in fact lower than in the previous 2007 elections. Flis concluded that women added to electoral lists because of the quota requirements were predominantly relegated to the role of list-fillers and not list leaders (Flis 2014: 259). Gendźwiłł and Żółtak (2020) showed that women candidates benefited from the adoption of quota legislation in Poland, but the effect was belated. The positive impact of gender quotas was weakened by party elites' gender bias and the unequal distribution of electoral capital between men and women. I hypothesise that while quotas increased the overall share of women on electoral lists, the share of women in viable list positions has not increased accordingly. This resulted in greater underrepresentation of women in viable list positions and greater overrepresentation in hopeless list positions.

H2: *The presence of gender quotas increases the negative correlation between female gender and viable list position.*

The advantage of incumbency

It is widely acknowledged that already being in office translates into increased chances of re-election. In the case of the European Parliament, having prior MEP experience helps develop specialised knowledge in venue-specific policies, build personal networks, gain influence and seniority within EP committees, and master navigating and manipulating the policy process (Pemstein et al. 2015). Hermansen (2018) discovered that previous legislative achievements and leadership roles in the EP consistently positively impact re-selection by

the national party. According to Gherghina and Chiru (2010), prior experience in the EP positively affects a candidate's position on the ballot in European elections. In most of the world's parliamentary assemblies, the lion's share of incumbents are men. The incumbency advantage is predominantly male privilege due to which women newcomers face more challenges to compete with and defeat male incumbents to win office. What follows, a decrease in the proportion of advantaged incumbents, is expected to provide more room for female candidates to run for and win legislative seats (Schwindt-Bayer 2005).

Nevertheless, the incumbency advantage can also work in favour of women candidates in the EP elections and counterbalance gender bias at nomination stages. Once women prove their electability, political parties tend to re-nominate successful candidates regardless of their gender (Lühiste & Kenny 2016). Feminist institutionalist research highlights that party recruiters – often unconsciously – screen candidates based on criteria that often reflect their own traits and characteristics (Bjarnegård 2013). As a result, men with these traits can be privileged in the candidate selection process. At renomination, however, party recruiters can more accurately assess candidates based on their legislative and electoral performance. These indicators reduce reliance on initial judgments influenced by masculine norms during first-time recruitment, providing women with more equal opportunities (Adams & Smrek 2018). Smrek (2020) found that in the case of Czech MPs, women benefit from incumbency advantage in the re-nomination process to the same extent as their male colleagues. I investigate whether a similar situation takes place in the Polish elections to the European Parliament.

Domestic political capital

A candidate's electoral capital in the EP elections can be significantly boosted by previous experience in national politics. Aldrich (2018) found that 'national politicians are more likely to enter through vote-seeking parties who want to perform well in the EP election for national gain' (Aldrich 2018: 1284). In the 2019 European elections, Beata Szydło – Poland's former PM who headed the Law and Justice government from 2015 to 2017 – received a record-breaking half-million votes (525,811) in the Lesser Poland and Świętokrzyskie constituency. Throughout the five Polish elections to the EP (2004–2024), among 25 candidates with the highest number of votes received, there were six ex-prime ministers (24%), 14 (56%) ex-ministers and 20 (80%) ex-national MPs (own calculations based on National Electoral Commission data).

Meserve, Pemstein and Bernhard (2009) note that in their nomination strategies, national political parties can use the European Parliament as a testing field for young politicians, but also as a 'dumping ground' for candidates with little national political future left. These national politicians can be sent

to the EP either because they are insubordinate or troublesome, or because of their older age. In the latter case, an MEP tenure can be a rewarding retirement position (Meserve et al. 2009: 1030). Scholars list three European Parliament career advancement models: (1) EP and an EU-level career as the main interest, (2) EP as a stepping stone to national office, (3) EP as a retirement home (Scarrow 1997; Aldrich 2018; Daniel 2015). In the third scenario:

> having served in national government for the bulk of his or her career, the MEP retiree is sent to Strasbourg to drink coffee with analogues from other European countries, biding time on the pension clock and musing about matters of continental importance as an avocation. (Daniel 2015: 5–6)

With the Polish delegation to the EP being one of the oldest in the EU (European Parliamentary Research Service 2019; European Parliamentary Research Service 2014; European Parliamentary Research Service 2024), the EP as a retirement home or a place of exile is a common career model. Given the high earnings of MEPs as compared with the salary of a Polish MP, this semi-retirement could be seen as a reward for loyal service to the party. According to Daniel, 'lavish material benefits ordered by the EP would have the strongest effect on delegations from the relatively poorer expansion states, such as Poland' (Daniel 2015: 144). The 'EP as a retirement home' model in the Polish context was colourfully described by Bartłomiej Sienkiewicz, at the time Poland's minister of culture, who in March 2024 called the European Parliament a 'sort of elephant graveyard' for politicians of a certain age:

> Some politicians my age go to a sort of elephant graveyard when their time comes. For the time being, however, I have things to do, so I have mocked the numerous rumours that I am about to be there. (Sienkiewicz 2024)[1]

Yet, a month later, Sienkiewicz – an experienced, but also controversial figure in the Polish politics – was announced to be heading the Civic Platform list to the European Parliament in the Lesser Poland and Świętokrzyskie constituency.

Lühiste and Kenny (2016) found that the probability of entering the EP from national elected office is much higher than from regional or local politics and is fairly similar across gender (0.16 for women, 0.18 for men). I therefore hypothesise that

H3: *Incumbency advantage and national political experience are connected to higher chances of securing a viable list position for both genders and reduce the negative correlation between female gender and viable list position.*

1 Translated from Polish by the author.

Poland and the European elections

This study examines the results of all Polish election to the European Parliament to date, i.e. the 2004, 2009, 2014, 2019 and 2024 elections. For the European Parliament elections, Poland is divided into 13 electoral constituencies. Accordingly, each electoral committee can propose 13 lists, one per constituency. There are ten candidate spots on each electoral list, resulting in 130 list positions nation-wide for each electoral committee.

Figure 1: Division of Poland's territory into 13 electoral constituencies for the European Parliament elections in Poland

Source: National Electoral Commission

Ballot rank and electability

In Poland, semi-open lists are employed in the elections to the lower chamber of the national parliament, the Sejm and the EP elections. Party leaders determine not only the composition of party lists, but also the ballot ranking of candidates. Voters may only cast a single vote, indicating the electoral committee of their choice and, at the same time, indicating a specific candidate from the list of candidates presented by that committee (Gendźwiłł & Żółtak 2020).

Gendźwiłł and Raciborski (2014) note that whereas Poland's semi-open list system primarily limits the parties' freedom to distribute the electoral chances of individual candidates, parties nonetheless have a number of instruments to influence the odds of candidates on their lists, and the most important among these instruments is ballot rank – the order in which candidates are placed on the electoral lists. Marcinkiewicz (2014) argues that characteristics of Poland's democratic system, i.e. the relative novelty of democratic elections, long candidate lists and high party volatility, might contribute to Polish voters' tendency to vote for candidates occupying first places on electoral lists, making the ballot position an effective shortcut for citizens. He furthermore suggests that 'the Polish electoral system provides incentives for voters to support candidates occupying prominent places on a party list... the ballot position effect in Poland is also an efficient shortcut for voters' (Marcinkiewicz 2014: 324). Millard (2014) found a positive, non-trivial correlation between list position and preference-vote shares in post-communist countries that have used a form of PR preference voting.

Descriptive statistics show that indeed in the European Parliament elections, Polish voters very rarely vote for candidates not ranked at the top of the ballot. 65% of all elected candidates were positioned first on the electoral lists (170 out of 260) and 20% were positioned in the second place on the ballot (51), leaving only 15% of Polish MEPs who were elected from the remaining ballot positions. No Polish MEP has ever been elected from the 6th, 7th or 8th positions, which are truly unwinnable seats.

Table 1 shows the success rates of candidates in each electoral list position in the EP elections (i.e. how many of all candidates in each position have been elected). The calculations are based on data that includes only viable districts, i.e. where at least one MEP was elected. Success rates of women and men at each position do not significantly differ, suggesting that voters follow the signals sent by political parties through the ballot order rather than being biased against female or male candidates.

Gender quota legislation

In 2011, Poland adopted legislation imposing mandatory 35% gender quotas for electoral lists. The new quota regulations were first implemented in the 2011 national parliamentary elections. When it comes to the EP, political parties have had to comply with the requirement of gender quotas since the 2014 elections. Table 2 presents the share of women elected to the EP and to the Sejm throughout the years, with a dashed line indicating the introduction of quotas.

Table 1: Ballot rank and success rate

Ballot $rank$	Success rate total	Success rate women		Success rate men	
1	89.0%	92.3%	36 elected out of 39	88.2%	134 elected out of 152
2	26.7%	23.8%	15 out of 63	28.1%	36 out of 128
3	10.6%	10.0%	8 out of 80	11.0%	12 out of 109
4	4.2%	2.8%	2 out of 71	5.0%	6 out of 120
5	3.6%	0.0%	0 out of 70	5.7%	7 out of 122
6	0.0%	0.0%	0 out of 80	0.0%	0 out of 111
7	0.0%	0.0%	0 out of 68	0.0%	0 out of 123
8	0.0%	0.0%	0 out of 64	0.0%	0 out of 126
9	0.5%	0.0%	0 out of 83	1.0%	1 out of 105
10	1.6%	2.4%	1 out of 42	1.4%	2 out of 143

Source: Own calculations based on National Electoral Commission data

Table 2: Percentage of Poland's women MEPs and national parliamentarians (lower chamber) and increase from the previous election

European Parliament (Polish MEPs)				Sejm (Poland's lower chamber)		
Year	**% of women**	**Change from previous elections**		**Year**	**% of women**	**Change from previous elections**
2004	15%	–		2005	20.4%	–
2009	22%	7 p.p.		2007	20.4%	0 p.p.
2014	24%	2 p.p.		2011	23.9%	3.5 p.p.
				2015	27.2%	3.3 p.p.
2019	35%	9 p.p.		2019	28.7%	1.5 p.p.
2024	28%	-7 p.p.		2024	29.4%	0.7 p.p.

Source: European Parliament, Szypulska et al. (2020)

While effectiveness of quotas can be incremental and prolonged in time, the lack of immediate boost in women's representation after the introduction of the quota bill can be explained by reference to ballot-ranking analysis. In the first EP elections held in Poland in 2004, a quarter of the candidates on electoral lists were women. The share of female candidates dropped to less than 19% in 2009. Following the introduction of obligatory quotas, a sharp increase to almost 43% was observed (24 p. p.). Quotas thus yielded a visible increase, and not only as regards numbers of women on lists. A similar, though less-pronounced, change following the introduction of quotas was visible as regards positions 1–3. Importantly, an analogous increase has not happened in the case of positioning first on lists.

Comparing electoral lists from the 2004 and 2009 elections (i.e. before the introduction of quotas) and lists from the 2014, 2019 and 2024 elections, the percentage of women on lists increased from 23.1% (2004 and 2009 combined) to 45.1% (2014, 2019, and 2024 combined). Yet, importantly, the increase was not balanced over ballot positions. The highest increase in women candidates is observed in the 9th (where the percentage of women tripled), the 6th and the 8th positions. As discussed in the previous sections, these positions are unwinnable, with no candidate ever being elected from these positions. Nevertheless, as Table 3 shows, the overall increase in female candidacies after the introduction of quota regulations also led to more women placed at the top of electoral lists, even if the increase is much smaller.

Table 3: Percentage of women in each ballot position, before and after the introduction of quotas

Ballot rank	2004-2009	2014-2024	Increase
1	16.0%	29.6%	13.6 p.p.
2	23.7%	42.6%	18.9 p.p.
3	28.4%	47.9%	19.5 p.p.
4	26.3%	39.6%	13.4 p.p.
5	32.1%	45.6%	13.5 p.p.
6	23.1%	55.6%	32.5 p.p.
7	27.1%	44.4%	17.3 p.p.
8	23.8%	50.3%	26.5 p.p.
9	19.0%	60.4%	41.3 p.p.
10	10.2%	34.9%	24.7 p.p.
Total	23.1%	45.1%	21.9 p.p.

Source: Own calculations based on National Electoral Commission data

Data, operationalisation and analysis

The three hypotheses stated in the section II are verified with a linear regression analysis. The analysis is based on an original dataset created for this study (Polak 2025a). I compiled information on all electoral lists and candidates from all EP elections. Data was sourced from publicly available files provided by the National Electoral Commission. I use this data to understand whether there are systematic gender differences in the practice of distribution of viable electoral list positions (see Grahn 2024).

Lists of electoral committees that have not had even one MEP elected from their lists during each election were removed. This resulted in the analysis of

electoral lists of eight committees in 2004, four committees in 2009, five in 2014, three in 2019 and five in 2024. As discussed before, there are 13 constituencies in the EP elections in Poland, and there can be maximum of ten candidates in each list. Hence, each electoral committee[2] had 130 list positions to fill in each election. The total number of observations equals 3,215. Every candidate was coded by gender, constituency, electoral committee, party affiliation, ballot rank, type of list position (viable/unviable) and various other information. In total, 1,114 (34.7%) of candidates were women and 2,101 (65.3%) were men.

The dependent variable is binary: 1 if a candidate was assigned a viable list position and 0 for any other list position. Scholars employ various approaches to operationalising a viable (or winnable/safe) ballot position (e.g. Kunovich 2012; Put et al. 2021; Smrek 2023). Given the specificity of the Polish electoral system in the European elections, where it is extremely rare for a party to win more than one seat in one constituency, I follow the restrictive operationalisation of a viable position proposed by Gendźwiłł and Żółtak (2020):

> For the lists winning seats in a given district, the viable ballot positions are {1... *m*}, where *m* is the party magnitude. (Gendźwiłł & Żółtak 2020: 211–212)

As noted by Gendźwiłł and Żółtak, employing a broader conceptualisation of safe positions could lead to including too many positions as viable, which 'can actually obscure the real placement strategies, which are unfavourable for female candidates, and thus could lead us to underestimate negative ballot ranking bias and, possibly, overestimate the positive influence of quotas on female candidates' chances' (Gendźwiłł & Żółtak 2020: 212). Out of 260 viable list positions in the dataset, 219 (84%) translated into successful election to the EP. The remaining 41 MEPs were 'ballot jumpers' who 'jumped over' their better-positioned colleagues from the same electoral list (Smrek 2023: 324).

The predictive variables include gender (female dummy), quotas, incumbency and two variables related to domestic political experience. They mark whether a candidate had past experience in the Polish government, serving either as (1) a minister (*Ex-Minister*) or (2) a prime minister or a deputy prime minister (*Ex-PM or Vice-PM*). These categories are generally not exclusive and in fact politicians frequently gain experience as a member of the cabinet before heading the government. However, for the sake of this analysis each candidate is coded either in one or the other category, with experience as PM or Vice PM taking precedence over ministerial experience. This is dictated by the fact that a past position in the Cabinet of Ministers is used as a proxy for political

2 I use the notion of electoral committees and not political parties because in the past European elections Polish parties frequently run in coalitions, with two or more political parties forming one electoral committee.

capital, position within a political party and recognisability among the Polish electorate, and I assume that past experience as PM or Vice PM translates into a higher level of all these advantages.

Each predictive variable is interacted with female dummy (*gender*). In case of quotas, I am only interested in the interaction with gender to see how the presence of quota legislation is related to women's access to viable list positions. In case of incumbency and national political experience, the interactions indicate whether there is heterogeneity in effect between female and male candidates. Table 4 presents descriptive statistics for different variables and distribution between female and male candidates.

Table 4: Distribution of variables in the dataset

Variable	Value	Men	Women	Total
Election year	2004	754	251	1005
	2009	419	101	520
	2014	373	277	650
	2019	203	187	390
	2024	352	298	650
Incumbent	0	1995	1083	3078
	1	106	31	137
Minister	0	1983	1078	3061
	1	118	36	154
Prime Minister or Deputy PM	0	2085	1110	3195
	1	16	4	20
Viable list position	0	1904	1051	2955
	1	196	64	260
Ballot jumper	0	2070	1104	3174
	1	30	11	41

Source: Author

Control variables include election year,[3] based on the assumption that there is a linear trend in women's access to political candidacy. Another control variable is the number of electoral committees per election. The latter control is added because the number of electoral committees directly translates into the number

3 Due to multicollinearity issues, including fixed effects for election was not possible.

of candidates in each election. For example, in the 2019 elections, the main opposition parties created one wide coalition committee in order to defeat the then-ruling Law and Justice party. As a result, several large and well-established parties, including the Civic Platform, the Democratic Left Alliance and the Polish People's party, had to share 130 positions on electoral lists (10 positions per list, 13 constituencies) among one coalition, instead of having 13 lists to fill by each party separately. The total number of candidates in 2019 equalled 390 (three electoral committees). For comparison, in the previous (2014) and subsequent (2024) elections, elected MEPs came from five electoral committees, resulting in 650 observations for each of those election years (see Table 4).

All models incorporate fixed effects for electoral committees and electoral constituencies. The results are presented in Table 5.

Model 1 includes only gender and control variables. The results indicate that when other predictive variables are not accounted for, women are indeed less likely to be assigned a safe seat in the EP elections, confirming their underrepresentation in viable list positions and a possible gender bias (Hypothesis 1).

Model 2 adds the interaction between quota and gender and shows that there is no statistically significant difference in safe spots assignment for women candidates before and after the introduction of quota regulation in Poland. This result suggests that H2 should be rejected; the presence of quota regulation does not appear to be related either positively or negatively to women's access to viable list positions in the European Parliament elections in Poland.

Model 3 introduces the incumbency variable, which proves to be a remarkably important factor contributing to the safe seat assignment. When interacted with the gender dummy, the variable is no longer significant, indicating that incumbency advantage is similar for women and for men.

Model 4 adds the previous national political experience of candidates into play. Both ministerial experience and PM or deputy PM experience turn out to be key variables influencing candidates' ballot ranking in the European elections. Similarly to incumbency, the interaction of both variables with the female dummy proves to be insignificant, indicating that previous national political experience benefits both women and men to the same extent. The third hypothesis (H3) is therefore confirmed. In model 4, the gender variable becomes insignificant, which could suggest that gender bias is connected to the unequal distribution of incumbency and unequal access to political capital.

Model 5 removes quota and the interaction of quota and gender. Most of the estimations do not change. However, interestingly, the gender variable becomes significant in such model specification, hinting that when electoral capital is controlled for, a marginal gender bias in distribution of winnable list spots remains, and that quota regulation mitigates that bias.

Table 5: Regression analysis

Predicted variable: viable list position					
Predictive variables	***Model 1***	***Model 2***	***Model 3***	***Model 4***	***Model 5***
Gender (female dummy)	-0.041*** (0.010)	-0.028* (0.013)	-0.025* (0.012)	-0.020 (0.011)	-0.017* (0.007)
Quota		0.003 (0.012)	-0.012 (0.018)	-0.003 (0.019)	
Quota*Gender		-0.022 (0.016)	-0.004 (0.015)	0.005 (0.015)	
Incumbent			0.481*** (0.051)	0.387*** (0.053)	0.387*** (0.053)
Incumbent*Gender			0.105 (0.102)	0.114 (0.096)	0.116 (0.095)
Ex-Minister				0.299*** (0.055)	0.298*** (0.055)
Ex-Minister*Gender				-0.096 (0.102)	-0.095 (0.102)
Ex-PM of Vice-PM				0.456*** (0.124)	0.455*** (0.124)
Ex-PM or Vice-PM*Gender				0.195 (0.146)	0.197 (0.146)
No of Electoral Committees	-0.007** (0.003)	-0.007* (0.003)	-0.004 (0.004)	-0.007 (0.004)	-0.007* (0.003)
Election Year	0.003*** (0.001)	0.003*** (0.001)	0.001 (0.002)	-0.001 (0.002)	-0.001 (0.001)
Electoral Committee FE	Yes	Yes	Yes	Yes	Yes
Constituency FE	Yes	Yes	Yes	Yes	Yes
Constant	-6.142*** (1.503)	-6.701*** (1.946)	-2.565 (3.929)	2.646 (4.337)	2.876 (2.322)
N	3215	3215	3215	3215	3215
Adjusted R^2	0.059	0.059	0.192	0.250	0.251
Within R^2	0.001	0.010	0.151	0.213	0.213

***p<0.05; **p<0.01; ***p<0.001**
Robust SE clustered at constituency*electoral committee levels in parentheses
Source: Author

Discussion and conclusions

This article has analysed the relationship between gender, gender quotas, political capital and the assignment of viable list positions in the European Parliament elections in Poland. The findings indicate that the unequal access to winnable electoral list positions is largely due to unequal distribution of incumbency and national political capital between men and women. Nevertheless, it appears that even when these factors are controlled, a marginal gender bias of party gatekeepers remains, and the presence of quota regulation might mitigate that gender bias to some extent.

The dominant role of electoral capital – in a form of incumbency advantage or national political experience – highlights the importance of historical path dependencies for women's access to viable political candidacy. The gendered nature of access to top positions in national government, rooted in centuries-long women's exclusion from the world of politics and from public life, at the present time translates into gendered imbalances in political capital and resources. To illustrate this statement with the data from the five consecutive European Parliament elections in Poland, out of 20 ex-prime ministers and ex-deputy prime ministers candidacies on electoral lists, only four (20%) were women. Ex-ministers appear 154 times in the dataset, and less than one-fourth (23%) of the candidates with ministerial experience are women (see Table 4). Out of 137 incumbents, 23% were women. As evidenced by this study, incumbency and national political experience provide a great advantage when it comes to the allocation of the most coveted list positions, explaining to a large extent the unequal access to viable political candidacy between men and women.

From a theoretical perspective, such results can be understood through the notion of path dependence, 'borrowed' by feminist institutionalists from historical institutionalism. 'Once a particular path is taken, institutions become self-reinforcing, or "sticky," and reforms that attempt to shift the path of an institution are difficult to effect, even when these choices appear better or more efficient' (Mackay et al. 2010: 577). Historical underrepresentation of women in parliamentary assemblies in general, and in the European Parliament more specifically, influences the higher shares of incumbent candidates among men and women, in turn perpetuating unequal access to winnable list positions. Similarly,

> a long history of male dominance in politics has given rise to informal norms and rules that help to perpetuate the status quo by making male politicians appear as more qualified and more worthy of being invested into in the form of trust and/or additional political opportunities. (Smrek 2022: 88–89)

On the other hand, the analysis also demonstrated that there is no difference between men and women candidates with regard to the positive relationship between incumbency and national political experience and being rewarded with a viable list position. These results support the outcomes of previous studies (Lühiste & Kenny 2016; Smrek 2020). What is more, once women possess the same electoral capital as men (either in the form of incumbency advantage or national political experience), the party gatekeepers gender bias in the allocation of viable list positions is small and likely to be mitigated by quota legislation.

In view of these findings, it seems important to consider long-term and indirect effects of gender quotas on increasing women's electoral capital. Cross-country studies show that gender quotas enhance perceptions of women's abilities as political leaders. They also boost support for women's political leadership among women themselves (Allen & Cutts 2018; O'Brien & Rickne 2016). The introduction of gender quotas can serve as a consciousness-raising event, leading to increased political knowledge and engagement among younger women (Venturini 2024). In the longer term, quotas are a factor in improving the competence of the political class through bringing about resignations of mediocre male leaders (Besley et al. 2017). They can also break down negative stereotypes against women politicians (De Paola et al. 2010).

While, as in the Polish case, quota regulations might not bring an immediate surge in the number of elected women, in the longer term they may be responsible for the increasing political capital of women and improving party elites' and society's perceptions of women leaders, which consequently translates (as shown in this article) into a more gender equal access to viable political candidacy.

Conflict of interest statement

The author reports there are no competing interests to declare.

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Populist-patriotism in Hungary: 'A Conservative Island in this Liberal European Ocean'[1]

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Abstract: *The growth of illiberal and authoritarian political parties and governments has given the notion of patriotism fresh political impetus. This article explores how Hungary's prime minister, Viktor Orbán, used patriotic discourse during Hungary's Presidency of the Council of the European Union from July to December 2024. It draws from an analysis of Orbán's speeches and interviews from this period that shows patriotism was used as a powerful signifier of illiberal ambition. We ask whether the Presidency was utilised by Orbán to further his stated aim of 'conquering' the EU on behalf of a European political right. The example of Hungary, though historically, culturally and geographically specific, provides insights into permutations of patriotism and its use in political discourse. The analysis contributes to understanding the intersection of nationalism and populist-patriotism in illiberal and authoritarian states.*

Keywords: ***Hungary, patriotism, Fidesz, myth, populism, illiberalism, nationalism***

Introduction

Hungary assumed the rotating Member State Presidency of the Council of the European Union from July to December 2024. The Presidency was important in giving a prominent platform to Hungarian Prime Minister Viktor Orbán and his politics as well as firmly positioning him within the populist political right.[2] Orbán is represented by supporters and others as a key actor in the transnational populist right, the model 'illiberal' politician and Hungary epitomising

1 Orbán's description of Hungary, (Orbán 2024 I 14).

2 In Hungary a governing coalition of FIDESZ (Hungarian Civic Alliance) and KDNP (Christian Democratic People's Party), has been in power since 2010. The coalition has 135 seats in the 2022 Parliament (of which 18 are from KDNP) and the various opposition parties have 64 seats.

the illiberal nation-state in transnational populist politics, arguably influential beyond its size (Political Capital 2022).[3]

This article draws on research on populist politics in Hungary (Bradford & Cullen 2021; Bradford & Cullen 2022; Bradford & Cullen 2025). In that work, we had become aware of Orbán's (and others on the global political right) frequent use of so-called 'patriotic' discourse. We were struck by the term's fluidity and its ambiguity, yet its apparent power to excite, inspire and legitimise. We wanted to understand how Orbán used patriotic discourse during his Presidency and what it meant especially in his often-troubled relations with the EU. Our guiding question in the article asks what part patriotic discourse played in this and how it fostered Orbán's illiberal politics locally and transnationally. In the article, we analyse Orbán's frequent use of patriotism in his speeches and interviews during the Presidency period.

As an invocation of attachment and devotion, patriotism relies on 'nation' as a boundary (the *patria*) on which it is dependent. Moffat (2017) points out that transnational populism struggles to construct a politically workable notion of 'the people'. We wonder whether Orbán's commitment to Patriots for Europe (PfE) (in Hungarian, *Hazafiak Európáért*), a transnational grouping within the EU Parliament, is similarly undermined by his fundamental commitment to a singular and pure Hungarian nation. However, patriotism's sheer abstractness, its ambiguity, seems to endorse its generalisable political currency. Importantly, Orbán's invocation of patriotism counters liberal or 'cosmopolitan' iterations of patriotism that embrace a duality of local identity with acknowledged moral obligations to a wider humanity (see, for example, Appiah 1997). Indeed, Orbán seeks to further a singular ethno-cultural Hungarian national identity. During the Presidency, and given his inward-focused perspective, Orbán attempted to share and export his patriotic politics and ideology across the European populist right using the EU as a networking and bridging mechanism. In that, patriotism seemingly provides a discursive cement. We explore this in the article.

The current strengthening of global illiberalism, fostered through transnational alliances of political actors, for example, the Conservative Political Action Conference CPAC), the US Heritage Foundation or Hungary's Institute of Foreign Affairs, renders patriotism especially important as a discursive baseline shared with actors in the transnational political right (Camus 2022; Abrahamsen et al. 2024, Caiani & Eren 2025). This article aims to contribute to the broad literature on the intersection of nationalism and populist-patriotism in illiberal politics. In particular, this work adds to the literature on the emotional

3 We understand illiberalism as an umbrella term that challenges three main principes of liberal democracy: limited power (e.g. rule of law), neutral state (e.g. impartiality, non-discrimination) and open society, (e.g. universalism, tolerance), (Enyedi 2024).

and symbolic politics of belonging, the Hungarian case showing how these are mobilised and woven into political discourse.

The article first establishes the political context of Hungary's Presidency. We then theorise populist-patriotism followed by an overview of methodology before presenting our data analysis. This is followed by a concluding discussion that identifies the significance of patriotism for Hungary and for transnational illiberal politics.

Hungary's (populist) Presidency of the European Union Council, July–December 2024

The rotating EU Council Presidency, chaired by member states, is intended to contribute to progressing and ensuring continuity of the Council's work on EU legislation, promoting good legislative processes and enhancing cooperation among member states (European Council 2025). Perceptions of the Presidency offering opportunities for a member state to promote national issues ('agenda setting') is contested, some analyses suggesting the entrepreneurial aspect of the Presidency (Vaznonyte 2022; Gonzatti & Völker 2025) while others identify this as potentially undermining its mediating functions that necessitate impartiality (Harwood 2025: 720). Accounts of Orbán's Presidency included elements of both these interpretations. In September 2024 the EU Parliament Research Service noted that the priority areas of Hungary's priorities for the Presidency partially 'overlap with the [Council's] Strategic Agenda… but its approach is idiosyncratic.… It does not list among the priorities climate action, equal opportunities, and democracy (including rule of law)' (EPRS 2024: 4). These were priorities for Hungary's 'Trio partners', Spain and Belgium, involved in taking forward the Council's Strategic Agenda but are areas that are deeply contested by right-wing populist politicians.[4]

Hungary's Presidency occurred amid difficult political circumstances for the government: the ongoing war in neighbouring Ukraine, contentious dependencies and relations with Russia and China, recurrent conflict with the EU over migration and 'rule-of-law' matters, challenging economic indicators, accusations of political corruption, sexual abuse scandals in public and religious settings and the sudden rise of an emboldened political opposition.[5] The significance of Hungary's Presidency is difficult to quantify. Outcomes consistent with the view that the Presidency should contribute to progressing the EU Council's work were achieved. These included expanding Schengen, matters concerned with EU enlargement and the Western Balkans accession, and the

4 By the beginning of the Presidency some EUR 21 billion of EU funding had been frozen (under the conditionality mechanism) because of concerns about, inter-alia, rule of law matters in Hungary.

5 Interestingly, patriotic discourse appears regularly (though differently) in the campaigning of the main opposition party 'Tisza'.

adoption of the Budapest Declaration on New European Competitiveness Deal (Political Capital 2025).

In contrast, Orbán's spectacular and much-publicised series of diplomatic meetings in Ukraine, Russia and China, characterised as 'peace missions', though with no EU mandate, were controversial – especially the meeting in Moscow. They risked overshadowing the Presidency and were regarded by some as undermining the EU's position. In geopolitical terms, especially in contributing to any resolution of Russia's war on Ukraine, the meetings had little apparent impact. Critics of the Hungarian government took a negative view of its Presidency. German Green Party MEP Daniel Freund claimed that 'Viktor Orban delivered the worst performance in EU history' (Freund 2024), another analyst suggested that 'Orbán used his presidency to gain visibility rather than to attempt advancements towards common European goals' (ECA 2025), whilst one supporter described it as 'one of the most remarkable and successful presidency semesters in recent years' (Scheffer 2024). Though gaining admiration from some, Orbán's Presidency challenged extant EU diplomatic norms, attracting criticism for aggravating already strained relations with EU institutions and other member states.

The Presidency can be understood as a key period in attempting to legitimise Orbán's international standing. It undoubtedly raised Hungary's international profile, contributing to strengthening Orbán's identity as 'statesman' and further established him as a leading light amongst far-right politicians in Europe, Russia and the MAGA movement in the USA. The Presidency also corresponded with Orbán's ongoing attempts to foster a 'European patriotism' now institutionalised in the trans-EU right-wing parliamentary group Patriots for Europe, whose formation was announced by Orbán on 30 June, the day before the Hungarian Presidency began. Orbán contends that PfE are 'the representatives of common sense' (Orbán I 20). Characteristically populist, this claim of common sense suggests that PfE symbolises the 'natural' order, reflecting the interests of 'the people' rather than a liberal elite allegedly represented by Brussels. PfE is based on ethno-*nations* notionally forming a European ethno-*region,* and encompassing the group's manifesto commitments to national sovereignty, identity, tradition as well as freedom and peace. It is now the third largest grouping in the European Parliament, comprising members from thirteen right-wing European parties and described by one analyst as an 'undemocratic organisation of illiberal states' (Hoeksma 2024: 4). The group's manifesto lies under the rubric of 'patriotism', a seemingly virtuous positioning yet obscuring a sometimes-crude nationalism exemplified by long-standing antipathy to migration. Orbán defines Patriots for Europe in binary terms 'as we are patriots this means right wing… Leftists are internationalists' (Föld 2024). Despite PfE's apparently shared ('internationalist') commitment to a European 'patriotism', tensions are evident within the group on policy including EU enlargement, relations with

Russia, NATO membership, support for Ukraine, free movement within the EU and rights issues. Whether Orbán's 'right wing' patriotism can reconcile these differences is an open question.

In the following section we contextualise Orbán's populist-patriotism.

Populist-patriotism in Hungary

As a form of strategic political practice, populism is neither intrinsically politically 'right' nor 'left' but fundamentally concerned with acquiring and sustaining political power on behalf of 'the people', as in Fidesz's version of Hungarian populism. Hungary's prime minister has been described as 'the role model of international right-wing populism' (Mos & Piozevan 2024: 329). Importantly for our argument here, populism can be understood as a political form highly amenable to absorbing content in order to 'signify', to create representations (and, therefore, meaning), through different language forms: textual, visual and so on. Some scholars have argued that populism is 'an empty form to be filled with meaning' (Szebeni and Salojarvi 2022: 815). During his EU Council Presidency, Orbán had much to say about patriotism and its importance for the nation-state and its place in Europe. He constructed narratives of patriotism aimed at both domestic and transnational audiences and supporters, these being disseminated widely through Hungarian and transnational hybrid media sources (broadcast, digital and traditional press). We interpret these as constituting attempts to buttress illiberal political and far-right cooperation across borders. Transnationalism has various permutations and can be defined as the 'multiple ties and interactions linking people or institutions across the borders of nation-states' (Vertovec 1999: 447). This multiplicity forms an important site of political engagement for the global far-right. A body of empirical and theoretical work has focused on the growing significance of transnational far-right networks (Caiani 2018; Fangen & Weisskircher 2024). This scholarship traces multiple on and offline transnational practices and political alliance-building developed to counter the alleged erosion of 'traditional' values by left-liberal politics (Calani 2018; Ettlinger 2025). The EU provides a rich networked cross-border eco-system for organising cooperation between illiberal populist parties (Zúquete 2015), clearly evident in the EU's Patriots for Europe group, launched as the Hungarian Presidency commenced.

The extensive literature on populism (see, for example, Canovan 1981; Hunger & Paxton 2022) identifies multiple approaches and perspectives. However, we suggest three principal characteristics shaping populist politics, each clearly evidenced in Hungary, contextualising Fidesz's populist-patriotism and forming its underlying logic. First, populism emphasises 'the sovereignty of "the people"' (De Cleen 2017). This entails an antagonism between infinitely malleable and ambiguous discourses of an imagined entity, 'the people', whose interests

populist politicians claim to represent and, similarly ambiguous, corrupt 'elites' *against* whom they purport to act on the people's behalf (Mudde 2004). This purity/corruption binary is central to populism and especially salient in Hungary whose government's self-representation is symbolic of a pure and *essential* Hungarian-ness (*Magyarság*).

Second, and contrasting with liberal-constitutionalism's alleged bureaucracy and its agonistic and endless debate (for example, its 'due diligence' in relation to environmental and social consequences of policies and their implications for 'rule of law'), populist ambition seeks to 'get things done'. This generates antipathy to 'intermediate' institutions, networks and actors, (for example, in Hungary NGOs, the EU and the 'European central state', the UN, George Soros's Open Society Foundations[6] and multiple civil society actors) which, these politicians claim, constrain political action (Osborne 2020; Lanczi 2015) and block their unhindered relationship with the people. Orbán's contempt for EU institutions, as we show in the article, reflects this view.

Third, right-wing populism is often predicated on discourses of nation. So-called 'origins' iterations of nation and nationalism rely on appeals to 'blood and soil', often drawing on ancient symbolic or cultural forms or invoking elemental ties of race and ethnicity in underpinning nationalist discourses (Gellner 1983; Anderson 1991; Smith 2010). A national membership's apparent *naturalness* encourages cohesion and identity whilst demanding loyalty and allegiance. It necessitates nation as a bounded and reified social form imagined (by populists) as a fixed and ethnically homogenous entity set in separated geographic and cultural space. Nationalism (and patriotism, we argue) is always focused on matters of boundary, inclusion and exclusion, centred on the nation discursively constructed as 'imagined community' with an 'inside' and an 'outside' and usually coterminous with the nation-state. Hungary's loss of substantial parts of its territory and population following the Treaty of Trianon in 1920 renders this partially problematic. For some, Hungary's historically *imagined* national boundary (and its national 'soil') remains consistent with pre-Trianon geography, thus integrating lost territory and Hungarians 'beyond the borders' into the nation, the context for Orbán's patriotism. In drawing a boundary around the Hungarian nation, Orbán celebrates homeland, an imagined common history and culture in a 'Europe of nation states' (Orbán 2025). However, a nation's imputed historical and cultural commonality is always open to contestation, revision and reinterpretation.[7] Orbán has argued that the future of nations is determined by 'which community loves its homeland more…

6 George Soros, Hungarian, liberal, Jewish financier-philanthropist has long been demonised by Fidesz because of his 'globalism', 'open borders' and promotion of migration into Europe allegedly threaten Hungary's security.

7 In Hungary this occurred as a consequence of its own historically complex multi-ethnic and religious identity and the idea of an ethnically singular Hungary is illusory (Berend 2001; Molnár 2001).

the most important thing is patriotism' (FEOL 2021). According to Orbán, for Hungarians 'the homeland is immanent, the nation's origin, without patriotism there is no healthy emotional life'. He suggests that Hungarian patriotism (in Hungarian, *hazafiasság* or *hazaszeretet*) is 'in-dwelling', inseparable from a romantic imaginary of the homeland and distinct from the 'post-Christian and post-national state' as he describes much of Europe (Orbán 2021).[8]

Declarations of a political patriotism have become common in populist and illiberal politicians' accounts and defences of their ambitions and programmes. Political communication using appeals to patriotism denotes the expressive power inhering in myths of the pure nation and the nation-state that underlie patriotism and upon which it is dependent and variously mobilised in everyday, routine and 'banal' ways (Brubaker 2004: 120; Billig, op cit: 6).[9] Some of the literature draws a binary distinction between patriotism and nationalism as either 'virtue' or 'vice' (Keller 2005). However, patriotism is broadly theorised in three, sometimes overlapping, forms. First, patriotism's nineteenth century expression in romantic European thought disparages 'national egoism', emphasises devotion and love of country, a way of life and tradition often formed abstractly yet also engendering a spiritual compact between the national and the universal, the particular and the general (Viroli 1995: 125).

Second, patriotism purportedly fosters an affectionate and expressive relationship between members of a (national) community and its 'homeland' (construed as geographic, cultural or social space), abstract values, material cultural practices and imagined history (Tinsley 2021). These are invoked and accredited as superior in comparison with those of (inferior) cultural others. The use of patriotic discourse thus entails the potential exclusion of those unable to share or access that history. In that sense, patriotism's current political utility may lie in bolstering national identities whilst simultaneously excluding or disparaging those categorised as abstract others, suggested in Hungary's preoccupation with migration questions.

Third, patriotism is understood as a potentially positive moral force (Anderson 1991; Mestrovic 1994). For Durkheim, patriotism includes the capacity for enhancing social solidarity (Turner 2019: 18) and he argues that *patria* can exist in concrete form (e.g. one's own country) or more abstractly and universally as a European or even world patria (Pendenza 2014: 160). Durkheim warns of

8 Christianity is a powerful underlying signifier that offers Fidesz a language of 'historical imagination' emphasising the authority of continuity and tradition (Heller 1999) despite religiosity in Hungary being relatively low (Pew Research Center 2018).

9 Importantly, patriotism is not solely reducible to discourse. It can include instances of embodied 'effervescence' during collective emotional experiences, in politicised form in national commemorations, celebrations or elections. An example is Budapest's ritualised patriotic public performance of nation, the so-called *Békemenet (Peace March),* a mass march and political rally, intermittently organised by the Fidesz-supporting *Civil Összefogás Fórum* (CÖF: Civil Unity Forum). Prior to the 2022 parliamentary election, for example, *Magyar Nemzet* daily reported that *Békemenet* attracted half a million marchers.

patriotism's potential for dangerous transformation into its *other,* an unfettered aggressive, militarised and exclusionary nationalism, apparent in the run-up to the First World War (Durkheim 1915). Bellah, reflecting Durkheim's position, similarly proposes a binary between (virtuous/rational) patriotism, 'love of country', and (bad/irrational) nationalism as 'idolatrous worship of country' (2006: 307). For Bellah, nationalist ideology is fundamentally exclusionary and contrasts with patriotism's alleged appeal to shared universal civic values. In current political circumstances, the binary's instability is evident. Patriotism's parasitic dependency on nation (as in Hungary) suggests that it always contains the potential for the identification of 'the other' and its exclusion.

This literature illustrates the ambiguity (and tension) surrounding the idea of patriotism, crucial in understanding how its political utility is mobilised. We argue that the distinction between positive or virtuous patriotism and negative destructive nationalism is overemphasised and unhelpful. The potential for patriotism's negative or positive effects is constantly present. As part of strategic political practice, patriotism is often deployed instrumentally by political elites soliciting identification, compelling loyalty or compliance from patriotic subjects and, as now in the Hungarian context, encouraging struggle or resistance against some *other*. As Orbán recently observed, 'in Europe, in the Western world, in the internal struggle, the liberals are losing, and the patriots are winning. The biggest victory in this regard is the victory of US President Donald Trump' (Magyar Nemzet 2024). Though patriotism claims an implicit virtue framed in terms of affection, allegiance, identification and sacrifice in the name of 'patria', it is used, in common with nationalism, to largely further the political aims and interests of elites. Both nationalism and patriotism's linguistic forms and associated claims-making practices may work on different registers but, currently at least, they exist within broadly similar discursive spaces. They may emphasise different attributes or tendencies, yet both are primarily attuned to boundaries delineated by nation or nation-state implying either inclusion or exclusion. This means that nationalism and patriotism are most usefully understood as overlapping and flexible political languages denoting insider/outsider-ship (Brubaker 2004) and deployed in different forms and settings to appeal to and mobilise loyalty and allegiance in the pursuit of power. In this article, we approach our data from that perspective.

Methodology

Our research interest in this article lies in analysing Viktor Orbán's discursive use of patriotism during the 2024 Hungarian Presidency of the EU Council. We understand this as part of Orbán's project of disseminating his worldview domestically and transnationally. Rotating member state presidents, it is argued, have 'significant agenda-setting powers… and are able to obtain policy outcomes

closer to their ideal preferences' (Van Gruisen 2019: 694). It is difficult to know the extent to which of Orbán's 'ideal preferences', as expressed in speeches and interviews during the Presidency, were translated to policy. Turbulent EU politics and Orbán's reputation due to Hungary's persistent EU rule of law and corruption deficiencies are likely to have had a bearing. However, as a defined period in which Orbán's ideas were made very clear, the Presidency offered a specific case study for analysing his political discourse and especially his use of patriotism. The expression of political aims during the Presidency was, we argue, especially significant for transnational constituencies within Europe and elsewhere with whom Orbán seeks to further relationships. Our analysis identifies Orbán's understanding of patriotism and how multiple strands of a fluid discursive patriotism were mobilised to establish and further political agendas. As well as being aimed at transnational audiences, extracts from his speeches and interviews were widely distributed throughout Hungary's domestic hybrid media landscape in various forms: radio, television, newspapers, magazines, billboards and so on. In this article we present a thematic analysis of the transcripts of these speeches and interviews, exploring discourses of patriotism, its meaning and performative political potential in Europe and beyond. We suggest that the co-option of patriotism is becoming plain in the transnational right's political script, and our analysis of this in Hungary offers insights into patriotism's political utility.

Speeches and interviews (and their texts) are pervasive forms of political communication, important components in political 'fields of action' (Wodak 2001: 66). As texts they are *performative* in the sense that they are not simply accounts or descriptions of some extant reality; rather they work to organise knowledge and construct the terms in which their objects can be understood. They comprise groups 'of statements which provide a language… a way of representing… a particular kind of knowledge' (Hall 1992: 44) which shapes meaning and conduct within the realities constructed by their discourse. As well as positioning Orbán, these interviews and speeches (and their texts) position audiences (domestic and other audiences) through various narrative devices, for example the use of symbols and metaphors, analogy, myth, voice and the emotional appeal of 'deep stories' (Hochschild 2016).

Throughout the process we endeavoured to stay reflexively aware of our own assumptions and any biases that might shape our understanding of the texts, our analysis of them and our interpretations of their contents (Trundle et al. 2025). A broad critical discourse analysis approach was adopted as methodologically appropriate to the task of analysing such texts because of its emphasis on the performativity of language in the realisation, exercise and reproduction of political power (Fairclough 1995; Wodak & Meyer 2001). We began by obtaining transcripts of 27 interviews and 36 speeches given by Viktor Orbán during Hungary's 1 July to 31 December 2024 Presidency. These are

available on the Hungarian government website in Hungarian, English and German. Each official English transcript was searched for references to 'patriot', 'patriotic' and 'patriotism', and the corresponding Hungarian transcripts for 'patrióta', its close associates, 'hazafi', its associates and 'hazaszerető' and its associates. We examined the context of the terms in the transcripts to understand how they were being used. Of the 27 interviews conducted during the Presidency and available on the government website, 15 contained references to 'patriot' or associates (either in Hungarian or English) and of the 36 speeches, 11 contained references to 'patriot' or associates (either in Hungarian or English). These references increased towards the end of the Presidency period, perhaps encouraged by the election of Donald Trump who was represented in the texts as emblematic of Orbán's notion of patriotism. It was evident that the key terms identified above were used in very similar ways in the speeches particularly, perhaps because they drew on similar sources and content. Interviews, on the other hand, necessitate a speaker responding to questions in real-time and they showed evidence of more diverse and reflective statements.

Having traced the location of terms in the transcripts we read and re-read the sections of the transcripts in which they appeared. This enabled contextualisation and consideration of the 'problems' that were being created in their representations of the world, the underlying assumptions, how subjects and institutions were positioned, 'absences' and how all these were represented and articulated in political space, raising inevitable questions about political interests (Bacchi 2012). From the original key words, we identified initial codes emerging from our data, similar to a grounded theory approach (Glaser & Strauss 1967), and informed deductively by our theoretical interest in patriotism as political discourse. We systematically compared these codes and collated them to form analytic themes which we understand as recurrent clusters or patterns of meaning distributed throughout the data. These were reviewed and refined to construct a discursive topography – that is, a thematic map of the data set (Ripley 2011: 274). The analysis in the following section is presented as four themes. In this article we draw on data from 15 interviews and three speeches.

We should note that working across two different languages raises particular methodological challenges. Translation of terms from one language to another must recognise porous and sometimes problematic boundaries, as meaning is culturally made and re-made (Tyulenev 2023: 212). For example, knowing what counts discursively as 'patriotic', either in English or Hungarian, is not always entirely clear. Acknowledging these terms' shifting cultural meanings, we were sensitive to the potentially different associations that they have in the two languages. In practice we relied on the speaker's contextual use of language to guide us. One of the article's authors is a non-native intermediate-level Hun-

garian speaker but guidance was taken from a native speaker, informing our approach and understanding of meaning and significance. Although the data are specific to the Hungarian context, we suggest that they can contribute to developing exemplars which enable generalisation to other settings (Flyvbjerg 2001: 73–74) in which discourses of patriotism are deployed politically by the transnational populist illiberal right.

Data analysis: Hungary's patriotic EU Presidency

We present our analysis under four sub-headings which derive from the themes identified in the data analysis and constructed from the coding process. They map a political ontology of Orbán's populist patriotism that was evident throughout his Presidency. Of course, these themes as 'materialised' linguistic forms extracted from Orbán's talk were present prior to and following the Presidency period. Indeed, patriotism has become an almost ever-present motif in his discourse. The Presidency gave an opportunity to *formally* or *officially* disseminate these ideas, the point being that the Presidency should be understood as an institutionalised source of power, albeit time-limited and temporary, that facilitated Orbán's presentations.

The four themes through which we organise our data are interconnected and mutually referential but not, we suggest, overlapping in the sense that one theme simply repeats or negates another. The themes interlace, appearing and reappearing through the data, forming an underlying structure and rationale to Orbán's patriotic discourse. In reading the texts and listening to his speeches and interviews, one is struck by so many elements being skilfully integrated under the rubric of patriotism or rendered in some way patriotic. Hence, patriotism's identification here as a 'floating signifier', which we discuss as part of the first theme, below. Perhaps inevitably, patriotism's dependence on nation evokes notions of boundary, insides and outsides, belonging and otherness, and we discuss aspects of these in the data. The idea of home and a homeliness under attack is, as we show here, central to Orbán's patriotism and the necessity of protective battle and struggle against hostile and predatory (external and internal) monsters and the monstrous is made clear. Finally, we think it possible to detect Orbán's sense of hope in his patriotism, again marked by boundaries, in this instance between a liberal dystopia and a utopian future marked by developments, real, anticipated or imagined, in transnational illiberal politics.

Data extracts are referenced with either 'Interview' (I) or 'Speech' (S) and a number. So, (Orbán, 2024, I 01) is interview number 1 and (Orbán, 2024, S 06) is speech number 6. They are included in the article's bibliography.[10]

10 All are accessible on the Hungarian Government Cabinet Office website: https://kormany.hu/miniszterelnoki-kabinetiroda

a) Orbán on patriotism

Orbán's speeches and interviews contain references to patriotism as a sometimes abstract, ambiguous, yet invariably virtuous, idea as well as it being part of the title of his political affiliation within the EU, 'Patriots for Europe'. It is often difficult to comprehend precisely what Orbán (like others) understands or means by patriotism as there is slippage between usages. Orbán's patriotism slides from 'romantic' notions to patriotism as a tool for stimulating politically adversarial discourse and practices. That capacity for shifting meaning empowers patriotism as political discourse, rendering it highly malleable.

In an interview with Hungarian state television at the start of the Presidency in July 2024, Orbán was asked whether patriotism undermines commitment to an international alliance – PfE, for example. Though not responding to the suggestion of tension between the particular and the universal implicit in the question, Orbán attempted to pin down the idea of patriotism. 'The starting point is that we love our country, we love our country passionately. This is patriotic feeling. It's also called nationalism. There are two kinds: the good and the bad.' This mirrors the binary identified in the literature between virtuous patriotism which includes a commitment to 'universals', and destructive nationalism which, for Orbán, is the 'bad' kind characterised by those 'who love their country while trampling others underfoot… who love their own country against others are usually considered chauvinists and bad nationalists'. Authentic (virtuous) patriotism, it seems, is non-transactional; patriots love their country intrinsically, for its own sake, for

> its culture, language, achievements, land, geography, family, history… cemeteries… churches… our children, and our future; this is what we love. This isn't aimed against anyone. And we don't want a Europe that takes away, diminishes, erases everything that is important to us as patriots. (Orbán I 01)

Contradictions exist between the neo-romantic patriotism expressed here and Fidesz's ethno-nationalism, the latter easily, it seems, accommodated by the former. This suggests patriotism's inexorable potential for the creation and exclusion of the *other* (Tinsley 2021). For example, migration and migrants are represented as a primary threat to the nation and the national 'home'. Orbán explains that inward migration would erode Hungarians' identity as migrants will

> change the cultural context of the country, we will lose our sense of homeliness… One does not want to be a tourist in one's own country, but rather to be at home, and this is very strong in Hungarians. Hungarians are a very patriotic and family-loving people, and therefore solving the demographic problem in Hungary with foreigners or strangers is unthinkable. (Orbán I 14)

These expressions are set in cultural space where this patriotic imaginary is threatened not only by migration, but by an imperious EU and the political left seeking to encourage inward migration to Europe. George Soros is, of course, the principal adversary here. We return to this point.

Throughout these interviews and across Orbán's speeches, patriotism emerges as a dynamic yet ambiguous *signifier,* a locus from which Orbán's politics can be tracked, either domestically or in the context of transnational/trans-EU settings. It is difficult, however, to understand this discourse of patriotism as having any 'anchored' form. It occupies no singular space and, apparently, contains no clear or fixed 'signified'. In Orbán's usage, the idea of patriotism can be almost infinitely extended, stretched to legitimise political aspirations and projects deriving from populist iterations of 'the people':

> since people want peace instead of war… People want migration to be stopped… People don't want their families to be made into jokes, and the family bond that is important to them, which organises life around a man, a woman, and raising children, is ridiculed by all sorts of other forms of coexistence that have been raised to the same level, let's call it simply gender. (Orbán I 03)

Discourses of patriotism absorb and circulate these political messages and almost anything can apparently be construed as having patriotic possibilities.

In his discussion of the social production of political meaning, Laclau (2005: 305) suggests that 'the plurality of discourses interrupting each other' renders some signifiers unfixed, unanchored or indeterminate. Patriotism is one such. This is especially marked in contemporary media eco-systems where signifiers – like patriotism – proliferate, transmute and become repositioned. Laclau refers to these indeterminate entities as 'floating' signifiers, unfixed yet absorbing meaning from different sources and, potentially, recirculating meanings that rarely remain static or stable. These meanings are never simply the property of the signifier; patriotism is not a fixed essence or entity. Patriotism's meaning is formed in practices – in discourse – in which it is appropriated, redefined and used by actors to create meaning in a signifying field (Hall 1997: 24). Orbán's patriotic discourse can, we suggest, be understood as such a floating signifier, difficult to define yet having adequate traction, especially at an expressive level, to be of political utility.

In recent years, appeals to patriotism have become more frequent in Hungarian government discourse, precisely because it appears to have become a powerful and emotive discursive tool in the realisation of political power. Patriotism's pliability, its elusiveness, its resistance to fixed definition and absence of anchorage becomes a politically valorising feature in its signifying capacity. Its expansive and ambiguous status leads almost naturally to a further chain of signifiers that colonise diverse political and policy territories (peace, migra-

tion, gender, family and so on) constituting a discourse of patriotism, whose value emerges in a range of settings. Of course, it is not only in Hungary where patriotic discourse's political utility is evident. Trump, the MAGA movement and others also sequester patriotism as their own, whilst similarly claiming to reflect the authentic voice of the people.

b) On boundaries and binaries

Throughout these interviews and speeches, we find references to different kinds of boundaries as social, cultural, spatial and temporal borders. Late modernity's uncertainties, fears and anxieties create multiple boundary crises. Questions of precarity and inequality, financial and economic challenges associated with neo-liberalism, the politicisation of migration, terrorism, competing ideas of identity, challenges to custom and individualisation suggest the contingency of contemporary social life (Bauman 2007). Temporally, much of Orbán's analysis of the present-day world expresses a sense of longing or lament. It relies on a nostalgic version of a historical past in which navigating the social world is imagined as having been simpler, the social bond characterised by a shared morality and similarity rather than difference. The texts here suggest that the Fidesz political world is shaped by boundaries (drawn implicitly from 'tradition') that offer certainty, fixity and binaries that enable the world to be represented and understood in relatively simple terms. As an attempt to evade modernity's ambiguities this creates conditions in which population – society – becomes the object of *government*, the 'conduct of conduct' (Foucault 1983: 221). As part of the broader exercise of political power these interviews and speeches (and their texts), thus, have pedagogic functions,[11] they distribute discourses of what is 'thinkable' (and 'unthinkable') in Hungarian identity and culture. Within this, the ritualised media-disseminated vilification of *others* (as actors, institutions or ideas: liberals, 'Brussels' or 'gender', for example) is performatively juxtaposed with a version of normative cultural expectations and obligations, often represented as tradition and purportedly embodied by Fidesz and Orbán. Patriotism is the discursive medium in which these binaries and boundaries are constructed and through which they are distributed. They rest on a popularised version of 'global crisis' – exemplified by Huntington's post-cold war 'clash of civilisations' argument, exhaustively critiqued elsewhere (e.g. Orsi 2018; Said 2001). However, its re-deployment in Orbán's (and others on the radical-right) sometimes apocalyptic utterances attests to an enduring influence, especially in the capacity to justify and legitimise illiberal and authoritarian politics in simple boundaried terms.

11 They are intended to influence audiences within Hungarian society's 'expressive' domain, dealing with the transmission of moral order, especially matters of consensus and difference.

The texts pose a range of dualities which, Orbán asserts, underlie politics in Hungary and more broadly signify a 'great civilisational struggle… taking place in the Western world' (Orbán I 25). The binaries include reductive abstract entities: leftist/rightist; liberal-progressive/patriotic forces; westerners/patriots; west/central Europe; nation-state/post-nationalism; loyalty/betrayal. Equally attenuated yet *embodied* binaries emerge around fixed notions of sexuality or ethnicity, crystalised in 'gender' and 'migration' discourses. On one side of each binary a discourse of patriotism is located in relation to its *other*. Sometimes specific actors are identified as the bearers and defenders of patriotism.

> Everything we hold dear is under full-spectrum attack… including in politics, but also in sport, the media, entertainment, everywhere…. As patriots, we must stand up for our country and our national identity, otherwise it will be devoured by attacks. (Orbán I 04)

Alongside this is a view in which patriotic discourse absorbs elements beyond a simple spatialised romantic patria and in which a patriotic politics is organised 'against migration… [which] protects families and children… that's pro-peace and not pro-war… that finally brings order to the economy' (Orbán I 22). For Orbán, Hungary exemplifies this as 'an island of difference… conservative, Christian, national… not part of the liberal [European] ocean' (Orbán I 13). Clearly, binaries ensure that 'otherness' can be made to exist in multiple forms, suggesting a view of an ambiguous yet boundaried patriotism under threat by a range of 'liberal' others.

Metaphors of battle and warfare have long been normalised in Orbán's media communications (Szabó 2020) and are evident here. In an October 2024 speech to the Lega per Salvini Premier in Italy, Orbán explained that PfE's aim is to defeat 'the Empire': Brussels. The spaces of the EU's central powers, both geographical and discursive, emplace the struggle, at the utopian end of which 'Paris will turn around, we will take back Warsaw…. Then we will take Brussels politics into our hands and make Europe great, strong, secure, rich and free again. We, Patriots, can do this!' (Orbán S 06). PfE 'have a war plan… how we will develop cooperation with European conservatives… the real Christian democratic right and tradition are with the patriots' (Orbán I 27). The task is to resist and eliminate 'Brussels' liberal, bureaucratic, centralising ambitions' (Orbán I 24). As Orbán's Presidency advanced, Donald Trump's parallel election focused further attention on the patriotism of struggle. Trump is a 'determined actor, prepared for a civilizational struggle, a struggle for the soul and future of the West… [he] has stepped on the side of the patriots… on the side of life' (Orbán I 26). The struggle between binaries is presented as rooted in destiny,

a battle between the 'old' and the 'new', between life and, Orbán implies, death.[12] These references suggest how transnational links have capacity for nurturing illiberalism and authoritarianism, patriotism as a discursive catchall, sufficiently ambiguous yet also retaining adequate signifying traction to focus the struggle. It is easy to see how, given the drama of Orbán's account of battle, oppositional forces can readily be understood as monstrous and monsters. We now turn to consider Fidesz's monsters.

c) Patriotism's foes: Multiple monsters

We explore here the figure of the monster and the concept of haunting, both present in these texts. This uncanny turn arises in the mobilisation of neo-nationalist/populist discourse reproduced both in the delivery of and repurposing of tropes from 'imagined' pasts, but also significantly in the rendering of the monstrous *other* in the present to be repelled from the nation/home. The *monstrous* takes a variety of forms: from the globalist demon Soros to the nameless Muslim hordes massing as unwanted and unwarranted refugees and economic migrants at the border fence (Barna & Koltai 2019; Kalmar 2020: Sata 2023). Fortress Europe is besieged; Hungary is her protector. The role of the 'good' patriot becomes that of valiant knight, as embattled protector of an ethno-nationalist kinfolk and tradition. Such discourses are threaded through populist-patriot leader speeches globally, Orbán's being no exception.

Freud's concept of das *unheimliche* is helpful here (Freud 2003). Whilst in English this is often translated directly as 'the uncanny', in German it contains a play on words and *heimlich* can mean the homely or familiar. Thus, unheimliche would suggest something that upends or challenges the boundaries of the home: the metaphorical 'haunted house'. Orbán repeatedly returns to representations of the nation as home, and the importance of the creation of homeliness. The battle posed is to drive out the 'unfamiliar' presence, people, cultural practices and discourses that pose an uncanny abject threat to the 'known' familiar homeland, 'Hungarians think, and they're right – they'll [migrants] displace us from our own country. They'll change the cultural context of the country, and we'll lose our sense of home' (Orbán I 14). Thus, to be patriotic is to sustain and nurture the known-familiar or risk intergenerational cultural dilution and erasure. As Orbán observes:

> The issue of home is at the heart of the domestic political problem that is straining Westerners in the whole migration pact. There are two ways to lose your home. One is that you are being dragged away from your home. The other is

12 The absent reference here to death is, we suggest, a reference to Russia's war with Ukraine. The pro-Fidesz slogan 'Nem fogunk meghalni Ukrajnáért' ('We will not die for Ukraine') has been evident in Hungary during the war.

> that you stay at home, but suddenly everything around you changes without your consent. You realize that the sense of homeliness in which you lived your life and which you wanted for your children and grandchildren has disappeared. And what's more, it has disappeared irretrievably. There is no greater political problem than this. (Orbán S 12)

As we see here, the crisis posed by these monstrous others is fundamentally existential. By repeating the multitude of threats, one might question the underpinning frailties anxiously evoked. Whilst the good, European, patriotic Hungarian is culturally and morally righteous in such language, peril lurks everywhere threatening the erosion of this fragile normality. Thus, politics becomes a hegemonic struggle framed in existential terms.

Invocation of the monstrous other renders populist-patriotism both normative and exclusionary (Puar & Rai 2002). Drawing on Foucault's work on the *abnormal* (see Foucault 2016), Puar & Rai argue that patriotism is often constructed as a heteronormative moral bulwark against the monsters within and at the gate, sexual deviants engaging in non-procreative sex, sexuality and gendered difference. Throughout these texts Orban reaffirms such immutable sex-gender binaries, traditional family relations and a fixed and 'traditional' gendered and sexual division of labour.

> It's the same with gender. I was born in a world – and Hungary is still in a world – in which we know that someone is either a man or a woman. In the West it's already thought that people are not binary beings. But then what are they? There are huge problems here. If we don't put our foot down and stand our ground, we'll see the overthrow of the world in which we can live lives most worthy of humans, in which a woman is a woman, the French are French, Hungarians are Hungarian and Americans are American. There's a worldwide campaign being waged against our values. Well, this is where we must resist. (Orbán I 04)

Humanity and a liveable life for good patriots is at risk. 'Putting our foot down' is necessary in resisting this creeping confusion about gendered and national identity, seemingly at risk of flux. Patriots have entered the transnational culture wars raging against gender ideology and 'foreign' deviant desiring bodies and practices in a series of moral panics (Bogaards & Pető 2022; Takács Fobear & Schmitsek 2022; Szelewa & Szikra 2024). The triple peril of 'gender ideology', LGBTQ+ rights and the dangers of miscegenation[13] must be repelled for the purity and

13 In a July 2022 speech in Băile Tuşnad, Transylvania, Orbán warned about the perils of racial mixing between Europeans and non-Europeans suggesting that where 'races' mix, the nation's existence is eroded. This echoes the Great Replacement theory voiced by transnationalist and US Far Right groups. See: https://www.washingtonpost.com/world/2022/07/27/viktor-orban-mixed-race-cpac/

safety of the nation's children.[14] It is the citizen's patriotic duty to ensure a heterosexual future for the ethnic-kin-nation repelling unnatural desires to ensure the ethnic purity of the nation and of Europe (Glass & Fodor 2022; Rasmussen 2023). This speaks to how concepts of patriotism are deployed strategically in the construction and maintenance of illiberal democracy. Themes of dystopian monsters, boundary flux and cultural demise frame the vivid imaginary of a conjured disgust (Ahmed 2004). The patriot is constructed via what they are not, by what is absent. But this in turn requires much discursive graft in maintaining fraying and anxiety-ridden boundaries guided by utopian-dystopian haunting potentialities.

d) Patriotism, utopias and dystopias

Utopias and dystopias have long captivated sociological, political and literary imaginaries. Kafka, Orwell, Krasznahorkai and Atwood's alarming depictions of dystopic worlds contain cultural currency as frightening visions of an imagined future. Dystopia especially seems to lend itself to framing existing real-time crises: climate change, Covid-19, multiple wars, cultural, economic and political breakdown. Populist politicisations of dystopia simultaneously arouse and frame utopian desire and longing and have a metaphorical relationship with perceived social conditions and change. Utopias are screens 'for modernity's self-consciousness' (Beilharz 1989: 151), defining a 'politics which wishes to change the system radically' (Jameson 2004: 35). Orbán's utopias, emerging at a time of political and economic crisis, express radical desires for a 'patriotic' world of peace and prosperity free of accumulated liberal detritus. However, it is not simply the content or object of utopia that is important, rather the form of its desire; utopians 'have a radical implausible desire to negate something in the world' (Rose 2022: 27). That negation is intended to shape a society depicted in terms of how it *should* be. We encounter expressions of such desire throughout these interviews and speeches.

For Orbán, the 'great dystopia' undermining Hungarian patriotism can be traced to the pre-1989 period.

> The communist ravages eliminated the very environment that makes this patriotic lifestyle possible, taking responsibility for oneself and one's community... the communists... wanted to force down our throats that the nation is not a value, there is no God, and the homeland, like everything else, is for sale. (Orbán S 31).

14 Fidesz policy has long been antagonistic to LGBT rights on the grounds that this is a corrupting influence on the nation's children. This anti-LGBT strategy has taken the form of a range of legal measures curtailing rights, from the 2021 Child Protection Law restricting media content on LGBT issues and banning their depiction in schools, a referendum focusing on the LGBT threat in 2022 and, more recently, outlawing Pride events (18 March 2025). Such measures have been critiqued by the European Commission and advocates for the European Court of Justice.

In this account communist tyranny was later supplanted by a liberal-imperialist European Union dramatically epitomising fresh dystopia that all patriots oppose. However, Brussels has become 'the liberals' last bridgehead, stronghold or citadel – to which they've been pushed back… the land of Mordor, the Dark Lord has withdrawn behind his battlements here, and now it's the only place where liberals can be found' (Orbán I 24). The reference to 'the land of Mordor' may be read as a reflection of far-right politicians' (Giorgia Meloni and JD Vance, are examples) contested capture of Tolkien's 'Lord of the Rings' narrative (Eaton 2024; Wren 2024), a mythologised traditionalist world, a potent symbol of unambiguous ontologies and pure identities allegedly almost eradicated through (liberal) modernity's claims to progress. Orbán's narrative hints at a kind of Nietzschean tragedy, the loss of a mythic homeland (see references in the previous section) and desire for return to a simpler, better and, perhaps for him, rather more *enchanted* world. Earlier references to civilisational struggle and change align with this. References in some interviews to Manfred weber,[15] a 'notorious Hungary-hater, pro-war [in Ukraine], pro-migration person' (Orbán I 03) may also cast the anti-patriot Weber as the powerful manipulative Dark Lord, Morgoth or Sauron. In this respect, Weber doubtless competes with Soros. Though suggesting the potency of myth, these references may also acknowledge Orbán's place in a transnational patriotic political constituency (including Meloni and Vance), an imagined community holding shared myths of dystopia/utopia codified through explicit references to Tolkien's fantasy novel.

In an interview with Austrian Television, Orbán skilfully juxtaposed dystopic and utopian narratives, suggesting that Hungary is already a utopian space that threatens liberal European politics because 'we are successful'. Patriotic Hungary is compared with liberal, progressive (dystopic) 'Europe'. Hungary has no migrants, therefore

> there is no terrorist threat… because migration always goes hand in hand with crime and terrorism. Migration also means higher levels of anti-Semitism, which we do not have in Hungary… [and] no homophobia in Hungary either, and the threat to women's equality is also a problem of migration: this is not the case in Hungary either. (Orbán I 13)

This politicised (and imagined) utopia/dystopia dyad framed as Hungary/Europe, is a potentially powerful narrative form that relies on simple binaries and ambiguous yet appealing signifiers. Its imputed *patriotic* themes are consistent throughout: the primacy of homeland, anti-migration, anti-war, pro-peace, anti-

15 Leader of the EU's European People's Party Group, a competitor group to PFE and with whom Orbán has had a long-running hostility.

-gender, family-friendly, Christian, Europe of nations are grounded in a politics which will, according to Orbán, instigate a utopia,

> a change within Western civilisation… of historic proportions: moving our lives from war to peace; from a world of economic misery, suffering and high inflation to economic success; from a sense of insecurity to security; from a world of gender madness to a world of protecting families; from a policy of supporting migration to a policy of protecting borders instead of a demented policy. (Orbán I 23)

During the EU Council Presidency period, and despite the disclaimer that 'President Trump isn't our saviour, but our brother-in-arms, a patriot who's fighting for the same values in his world as we're fighting for here in Hungary' (Orbán I 25), Orbán depicted Donald Trump as the messianic agent of political and civilisational change. His unquestioning faith in Trump's election, signalling the 'the biggest victory of the patriots over the liberals' (Orbán I 24), reappears throughout these interviews and speeches. Trump 'has made it clear that he'll end this war in Ukraine within twenty-four hours. So if he wins there will be a ceasefire at the very least' (Orbán I 01). Trump is the key to civilisational transformation, the co-agent and catalyst for new utopian times. As Mannheim long ago observed, a 'state of mind is utopian when it is incongruous with the state of reality within which it occurs' (1936; 1979: 173). Desire, it seems, often wins out over reason.

Concluding discussion

In this article we have explored Orbán's use of patriotic discourse in his speeches and interviews during his Presidency of the European Union Council. Our work suggests that patriotism was used to underpin and legitimise an illiberal worldview to both domestic and transnational audiences. Importantly, patriotism was often deployed antagonistically, instrumentalised against the imputed 'left--liberal' EU. The irony here was striking as it suggested that the prime minister of an EU member state, as rotating president of the EU Council, used a central institution of the (liberal) EU to castigate the EU itself in the pursuit of illiberal ends.[16] This warrants further research.

We acknowledge the methodological limitations of the work and we cannot claim to be able to generalise directly from the Hungarian case. Nevertheless, analysis of patriotic discourse's emergence and political use in Hungary and its

16 In Hungary's 21 years of EU membership, it has received some EUR 68 billion in EU funding (although currently frozen), contributing annually up to 3.5% of GDP (GKI 2025). Orbán's deployment of patriotic discourse during a high-profile period offers an interesting example of a prime minister seemingly biting the hand that feeds them.

dissemination through illiberal and far-right alliances sheds light on its importance in transnational contexts. Patriotism, as we have shown in Hungary's case, and we believe elsewhere, is a powerful, flexible and appealing political signifier. Allegedly innocent of the accusations levelled at nationalism, it has considerable potential for legitimating populist illiberal politics.

The Hungarian Presidency had mixed policy outcomes including some acknowledged successes. However, and more importantly, Viktor Orbán exploited the opportunity to draw from and use the symbolic capital that accrues to the Presidency to disseminate his worldview, emphasising his political identity domestically and transnationally and strengthening relationships with other illiberal politicians. We have shown that the Presidency gave Orbán a platform to further his populist-patriotism, in effect to promote his 'ideal preferences' outlining a world of patriotic politics and contrasting that with a dystopian imaginary of a liberal order. The Presidency provided opportunities for Orbán to further his criticism of The EU and 'Brussels', for Orbán the 'Land of Mordor',[17] in the context of launching the Patriots for Europe group in the European Parliament. Patriotic discourse was used to condemn EU institutions, facilitated by the institution of the Presidency itself. As such, and reflecting Durkheim and Bellah, for example, patriotism forms a shorthand for commitment and allegiance to a shared yet imagined *national* community which, in Hungary and for Orbán, is the ethno-cultural nation on which patriotism relies.

Orbán's Presidency can also be understood as an example of the *paradoxical* retreat from global liberalism into local nationalism/patriotism which is discursively and strategically mobilised *transnationally* via local deployment of 'global culture wars'. As Orbán demonstrates, the patriot remains curiously parochial yet discursively global. This productive tension between local and global/transnational 'patriotism' is also highlighted in the PfE group. Our data analysis suggests that patriotism seems to act as a kind of 'code' adopted by these actors, representing what they share, ignoring or glossing over what is not shared and differentiating the content and mode of their politics from other political perspectives. However, as patriotism relies on underlying discourses of a boundaried nation, one wonders how stable this code, its associated community and its politics might be beyond the single nation. This may have implications for the PfE group and warrants further research.

We have shown that patriotism as discourse has potential as a powerful and enduring political tool. Theoretically, we share the analysis that understands patriotism and nationalism as being languages of political practice. Patriotism is important as a language through which popular, and especially *populist*, politics is conducted, framing 'political arguments by appealing to the patria,

17 Orbán's appropriation of Tolkienesque intertextual references can be read as a possible signalling, an acknowledgement of shared membership in the transnational illiberal imagined political community.

the fatherland, the country, the Nation' (Brubaker 2004: 120). Its historically embedded appeal to spiritual unity and the preservation of nation's common culture carries deep emotional resonance (Viroli 1995: 114) and is readily amenable to political exploitation. Its capacity as a language to create identification and solidarity, understood as morally virtuous, is mirrored by its ironic facility for initiating and furthering political conflict, implying patriotism's exclusionary potential. Thus, and paradoxically, patriotism is often currently deployed antagonistically, making and marking political boundaries between, for example, a *patriotic* Hungary and (in Viktor Orbán's estimation) a 'left-liberal' globalised EU. Transiting between virtue and vice, patriotism can simultaneously exploit the language and practice of inclusion and exclusion. We have identified numerous examples of Orbán using this language in the effort to inspire or incite. As we have seen, the boundary between patriotism and nationalism is blurred and porous due to the inherent ambivalence of both. Orbán apparently recognises that 'patriotic feeling [is]... also called nationalism. There are two kinds: the good and the bad'. In this he echoes much of the literature, but the point here is that patriotism and nationalism imply both inclusion and exclusion. Virtuous ('good') patriotism always has the potential for transformation to something sinister.

The patriot (and patriotism) as an ideological vessel is overloaded with shifting and multiple meanings, constituting it as a floating signifier absorbing and disseminating meaning ('signifieds') across the political field. We teased out how its discursive strands were mobilised in attempts to legitimise Orbán's local and transnational political ambitions during the Hungarian Presidency. Our analysis of Orbán's recent use of nationalist patriotic-political discourse suggests that patriotism is freighted with contextual meaning yet is perpetually slippery. Understanding patriotism's emotional loading is vital. In his discussion of the nation-state's successful emergence as central to modernity, Eagleton suggests this

> is not least because it harnesses the most tenaciously 'imaginary' sentiments, in the name of which men and women will readily surrender their lives, to the impersonal symbolic order of law, commerce, justice and citizenship. (2009: 52)

So it is with patriotism. It can best be understood as shifting and pliable, absorbing and reflecting meaning and, as we have noted, almost anything can be placed under the rubric of patriotism and designated patriotic: Elements from gender, to ethnicity, to peace, to landscapes, to traditions, to religion and so on can apparently be shaped and used as patriotic symbols. Patriotism's power derives from its ambiguity, matched by its capacity for irony and paradox, its status as a floating signifier denoting a symbol sufficiently flexible and open to multiple contextual interpretations yet concrete enough to enable it to be used

to political advantage. Thus, the patriot becomes a figure both curiously static yet perpetually in flux. It is constantly made and re-made, its relation to the nation-state partly determined by the re-formulation of old and newer binary borders and foes. Indeed, the certainty and proximity of the constructed *other* is vital in shaping the patriot and patriotism. Populist politicians, it seems, need their monsters to mark boundaries.

Patriotism matters because it has great political utility. As discourse it is versatile and flexible. It underpins aspects of the organising logic of contemporary illiberal democracy within and across transnational contexts, nourished via connection and contrast with the pervasive dystopian other whilst expressing aspects of a contrasting utopian desire. Yet whether destiny, tradition, religion, common-sense or patriotism forms the legitimising power, utopian desire's shadow is ever-present in the face of contingency and the evident impossibility of realisation. Disappointment emerges in the space between an imagined utopian future and the constraints of the empirical 'here and now'. The rapid growth in support for the political opposition in Hungary, for example, at the time of writing ahead in the polls, suggests growing popular disappointment with both Fidesz's political achievements and its utopian ambitions. Of course, the anxieties and uncertainties that emerge in late modernity reflect real human concerns and needs, experiences and questions surrounding 'home' and 'homeliness', for example. However, utopian fantasies of radical 'civilisational change' as response, though seductive for some, seem illusory and destined to further disappoint. When accompanied by radical populist interventions in the economy, as in Trump's United States or Milei's Argentina, for example, it is difficult to see how these can offer a stable reflection or resolution of 'the people's' real interests or needs. Despite this, iterations of 'new' utopian patriotisms are emerging globally, presently exemplified by 'Patriots for Europe', and in some places seem to lead to political success. The reshaping of the transnational or global 'patriot' as symbolic carrier of political discourse is a vital area for further research in understanding and re-imagining the cultural fabric of illiberal and authoritarian states.

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Story of the Czech Senate Elections: What Roles of the Upper Chamber Voters Expect and Which Candidates They Vote For

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Abstract: *Although upper chambers play a key role in democratic systems, little is known about how citizens actually perceive their functions. The Czech Senate offers an instructive case due to its ambiguous institutional position and relatively low public visibility. This paper examines how Czech voters perceive the Senate and how these perceptions have evolved over time, distinguishing three main conceptions: an oversight institution within the horizontal separation of powers, a representative of territorial interests and an independent, elitist 'Chamber of wisdom.' The analysis draws on a large, original dataset covering all Senate elections from 1996 to 2022, including newly constructed variables capturing candidate characteristics and constituency-level features. Candidate-level regression models identify which types of candidates are most successful and what this implies for perceptions of the Senate's role. The findings reveal effects of variables connected to all three alternative perceptions of the Senate. They also suggest that the Senate's independent and less partisan character has gradually strengthened, demonstrating that institutional meanings can evolve in practice even without formal constitutional change. By combining comprehensive electoral data with novel measures, the study contributes to broader debates on the relationship between formal institutional design and citizens' perceptions, and on electoral behaviour in second-orderelections.*

Keywords: ***bicameralism, Czech politics, electoral behaviour, perceived roles, political institutions, representation, second chambers, second-order elections, upper house***

Introduction

At the beginning of the 1990s, the decision to dismantle Czechoslovakia was made rather surprisingly and, above all, quickly. Thus, there was a sudden need to create a constitutional system for the newly emerging independent Czech state. Due to the need to adopt the constitution of the new state before its establishment, the constitutional order of the future Czech Republic was hastily created. Not surprisingly, then, parts of the newly adopted Constitution were largely a compromise (Kopeček 2017: 115–119).

One such compromise was the Czech Senate, when several alternative approaches to bicameralism were considered (Kysela 2004). Part of the opposition, as well as some governmental politicians at that time, even rejected the idea of forming an upper chamber (Kopeček 2017: 126–129). Eventually, almost four years after the establishment of the Czech state itself, the Senate was created. However, as Urban points out, the late creation and constant debates – which have not disappeared to this day – regarding the Senate's position may have weakened its authority early in its existence (2016: 281).

As a result, the role of the Senate (and its need in general) has become an unsettled question. This Czech scenario is no different from what the upper chambers in other countries are experiencing. This should not be too surprising, as the existence of the upper chamber is, according to Sartori (1994), the most contested issue in parliamentary systems of government. Not by chance, Russell (2013) advanced the influential thesis that perceived legitimacy is an important factor to consider when evaluating the functioning of the upper chambers. Russell and subsequently other authors (see, e.g. Just & Charvát 2022; Mueller, Vatter & Dick 2023; Štrus & Brezovnik 2023; Vercesi 2017) place particular emphasis on the *perception* of upper chambers. As Hruška and Balík (2025a) pointed out, this should not be limited to perceived legitimacy, but should also consider the perceived role.

As Saward (2010) notes, even for elected bodies, claims to (legitimate) representation can (and do) extend beyond the mere existence of an electoral mandate to include claims based, for example, on history, culture, competence or other imperatives. This perspective may be particularly suitable for evaluating an institution, such as an upper chamber, with potentially divergent roles. In this regard, Kysela (2004: 125) points to the possible development of upper chambers and the representation of originally unintended interests. Therefore, it is important to examine not only the constitutional designations of the upper chamber, but also the perceptions of individual actors.

Using interviews, Hruška and Balík (2025a) found that ordinary citizens indeed have different perceptions of the Senate's role. These include the role of traditional political oversight (second opinion) based on the principle of horizontal separation of powers, the role of representation of territorial interests

and the role of independent oversight performed by an elitist apolitical council of the wise. However, we do not know to what extent these different perceptions of the upper chamber are pervasive within the population, or whether they have changed over time. Therefore, this paper seeks to answer two main research questions: how Czech voters perceive the role of the Senate and how this perception has evolved over time. It does so through a quantitative analysis of all Senate elections and candidate characteristics, revealing the types of candidates voters favour and what this implies about their view of the Senate's role.

The analysis is novel because it employs previously unused conceptualisations and operationalisations of some variables. In the appendix (see Appendix B), the paper also examines differences in perceptions of the Senate across different types of constituencies, based on two criteria: 1) urbanisation (urban vs. rural character of constituencies), 2) the natural character of delineation of the senate constituencies in the sense of corresponding or not corresponding to existing territorial/administrative units (such as former counties). The paper's contribution is not only a deeper understanding of Czech bicameralism and electoral behaviour; this work also shows how the perception of the role of an entire constitutional institution can differ and even change over time, despite its constitutional and legal stability.

In the following chapter, the possible roles of upper chambers are discussed while this theory is applied to the Czech context. This is followed by a methodological section, which explains how to measure the different Senate roles and, in particular, the relationship between these roles and the specific characteristics of the candidates. Then follows a section with the results and their discussion.

Theories of upper chambers in the Czech context

Upper chambers are generally justified by two primary functions: 1) representing specific interests, and 2) exercising oversight in line with the principle of horizontal separation of powers (Russell 2001b). Haas (2000) thus differentiates between 1) the principle of representation, which pertains to advocating for particular interests such as territorial entities, minorities or ethnic groups, and 2) the functional principle, which relates to the oversight and controlling role of upper chambers within the framework of power separation. Tsebelis and Money (1997) then use two arguments to legitimise upper chambers: 1) the efficiency argument (oversight over the content and technical improvement of laws), and 2) the political argument (addressing the representation of diverse social interests).

When considering the representation of specific interests, the role of an upper chamber can be further categorised. This includes representation of territorial interests (Russell 2001a), minority groups (whether national, ethnic, linguistic or religious), professional and class interests, and the privileged classes (Russell 2001b: 433–436).

An upper chamber that does not represent specific interests operates primarily under the principle of horizontal separation of powers (Loewenstein 1969: 167–170). This principle encompasses a variety of sub-roles. These include improving legislation, achieving deeper and longer-term compromise, defending against the tyranny of the majority, acting as a check and balance, and acting as a constitutional safeguard (Bogdanor 1992; Riker 1992). In the case of the Czech Senate,[1] most theoretical roles that typically justify the existence of an upper chamber can be largely set aside. The roles that the Senate fulfils – whether from a constitutional perspective or as perceived by actual political actors (including the general public) – are examined in greater detail below.

Political oversight role

Although various roles and justifications for the Senate's existence were debated during the drafting of the Czech Constitution, the principles of separation of powers and the theory of checks and balances ultimately shaped its design. The architects of the Constitution envisioned the Senate as a chamber of second opinion rather than as a body advocating for specific interests, including territorial ones (Kysela 2004: 427). This decision was influenced by the characterisation of the Czech Republic – it is a relatively small, centralised, unitary state with a homogeneous population, where the need for a territorial representation (or representation of other specific interests) in an upper chamber is, in general, minimal (Palermo 2018; Passaglia 2018).[2] Furthermore, in the aftermath of Czechoslovakia's dissolution, further potential decentralisation and regionalisation were viewed rather unfavourably.

Two key characteristics of Czech bicameralism confirm this conclusion. First, the Senate lacks any formal powers over territorial units, a hallmark of upper chambers that represent territorial interests (Kysela 2004: 125; Popelier 2019). Second, the single mandate constituencies used for Senate elections do not formally align with any administrative or territorial divisions of the country, though some constituencies resemble and are named after counties. Constituencies sometimes even span over two or more regions (see Figure 1).

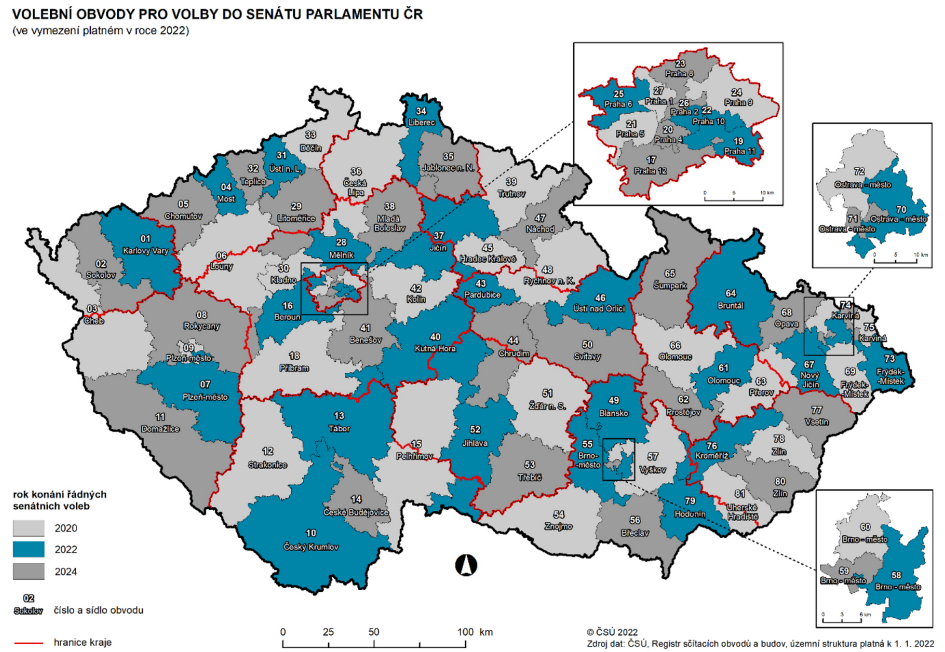
1 The Czech Parliament consists of the Chamber of Deputies (200 members) and the Senate (81 members). Unlike the majority system used in Senate elections, the lower chamber is elected by a party-list PR system. Both elections are characterised by multi-party competition, which reflects the rather broad multipartyism characteristic of the Czech party system. Czech bicameralism is asymmetrical. The Senate has only a suspensive veto in the legislative process. However, the Senate's consent is required in some specific cases, including the approval of constitutional and electoral laws, the ratification of international treaties and some other decisions. The Senate also has some other, mainly creation or control powers (e.g. appointment of constitutional judges).

2 The Czech Republic does not have significant regional, religious, linguistic or racial minorities (Frank 2020: 52), which are traditionally represented in upper chambers based on the territorial representation.

This structure makes the potential representation of territorial interests very challenging (though not impossible).[3]

Under this conception, the Senate performs two specific sub-roles (Kysela 2004: 54). The first is a stabilising sub-role, in which the Senate acts as a democratic safeguard, a stabiliser in the system and a guarantor of long-term compromise. This sub-role relates to the powers of the Senate, such as approving constitutional amendments, electoral laws or the appointment of constitutional judges, where the Senate cannot be overruled. The second is a revising sub-role, in which the Senate is expected to primarily improve the parliament's legislative performance by providing a day-to-day second opinion on proposed bills. This role primarily concerns the Senate's powers to adopt common legislation, which can be overridden by the lower chamber. The first role is less well known among citizens but is more important for the Senate's perceived legitimacy. The second role is more visible as it is more frequently exercised, but is affected by the fact that the Senate can simply be ignored (Hruška& Balík 2025a). It is important to note that both these sub-roles are political in nature, as they are carried out by elected politicians, often affiliated with political parties.

Figure 1: Current delineation of the Senate constituencies



Source: CSO 2024

3 The issue of the delineation of Senate constituencies and their changes over time is addressed in detail by Antoš (2013). See also Table A6 in Appendix A with the list of the Senate's constituencies and their types.

Territorial role

Despite the formal framework of the Senate, the way senators are elected in single-mandate constituencies often creates the perception – among both voters and some senators – that the Senate is composed of representatives tasked with advocating for the interests of their respective constituencies (Hruška & Čapek 2026). This perception is further reinforced by senators' natural inclination to seek re-election at the end of their term. Since their re-election depends on voters in their constituencies, senators are incentivised to prioritise local interests and address issues affecting their electorates. This phenomenon was noted by Petr Pithart, former Senate president, who observed that local concerns began accumulating within the Senate just three years after its establishment (1999: 12). Pithart (2016) has since been highly critical of this trend, arguing that the focus on regional issues detracts from the Senate's ability to fulfil its primary role effectively.

While Kysela rejects the idea that the architects of the Constitution intended to create an upper chamber based on the principle of regional representation, he highlights a broader pattern in which upper chambers may assume roles not originally intended, such as implicitly representing specific interests. In the Czech context, this tendency arises due to the electoral system and the delineation of constituencies. Kysela describes this phenomenon as 'a situation in which members of the upper chamber, in fact, predominantly represent a particular social interest, without this being taken into account when the chamber was designed' (2004: 125).

There is additional evidence supporting the idea of the Senate's spontaneous regionalisation. Although Senate constituencies do not always align with territorial units, many candidates campaign – and later behave – as ombudsmen of their constituencies. According to Malcová (2012), candidates frequently make promises during campaigns that they are unable to fulfil once in office due to the lack of formal powers regarding territorial role. On the other hand, Hruška and Čapek (2026) recently showed that there are (mainly informal) tools that senators use to advocate for the interests of their constituencies.

Moreover, this perception is supported by some of Brokl's (2001) findings from the early Senate years. According to his research, 68% of questioned senators considered themselves to represent a constituency. Only 26.4% of senators saw themselves as representing all citizens, and only 5.6% of senators saw themselves as representing their party. However, according to Jágr (2023), who employed almost identical methodology, only 34.8% of senators primarily represented the citizens of their constituency in 2020, although this is still more than twice as many as members of the lower chamber. However, 56.5% of senators said they primarily represented all citizens. This suggests a change of perception over time.

Chamber of Wisdom

Beyond the two theoretical conceptions of the Senate discussed above, it is important to acknowledge that citizens hold a third, less clearly defined perception of its role. This perception, often referred to as the 'Chamber of Wisdom', envisions the Senate as a supervisory body, not dominated by political party representatives, but composed of independent individuals with distinct qualities (Hruška & Balík 2025a). This view aligns closely with the concept that the upper chambers represent certain privileged groups. Blom (1992) explains that, according to this theory, certain segments of society are more predisposed to participate in governance due to accumulated experience, wisdom or specific moral qualities. Passaglia (2018) notes that an 'heir' of the aristocratic second chamber may be seen in those chambers which, by their composition, strive to ensure an additional dose of 'wisdom' within institutions. It is, therefore, possible to speak of a chamber of elites. In the Czech context, the demand for this type of upper chamber may also stem from dissatisfaction with politicians and political parties, a recurring theme of Czech populism (Engler, Pytlas & Deegan-Krause 2019).

As Kysela notes, such a model (e.g. British House of Lords) is typically associated with forms of membership that do not rely on universal popular elections (such as appointment or ex officio memberships) (2004: 427). According to Passaglia (2018), however, such an approach to upper chambers may also be expressed in increased passive suffrage. That is the case with the Czech Senate, where the minimum age to become a senator is 40. Such senators are supposed to be wise enough to avoid any 'mistakes of youth' (Passaglia 2018).

In addition to wisdom and experience, the perception of the Senate as the Chamber of Wisdom also includes political independence of senators (Hruška & Balík 2025a). Balík (2017) describes the intention of constructing this kind of chamber, and Brokl (2001) and Jágr (2023) confirm that senators do not primarily perceive themselves as representatives of their own political party. On the other hand, it is unrealistic for elected politicians not to have certain ideological and value orientations and to make decisions based solely on 'what is and is not good', as some citizens reported (Hruška & Balík 2025a). The senators themselves rejected the notion that they are apolitical (Hruška & Balík 2025b).

Methods and data: Towards original conceptualisation and operationalisation

The regression analysis of Senate election results at the candidate level is employed. Data includes all Senate contests held from the first Senate election in 1996 to the 2022 election – fourteen regular Senate elections and fifteen by-elections. In total, 447 senatorial contests are analysed (see Table A1 in the

Appendix A), in which a total of 3,343 candidates stood for election, 447 of whom won a senatorial seat (see the Appendix C for the dataset).

The Senate as a chamber of political oversight

As explained in the theoretical section, an upper chamber operating under the horizontal separation of powers principle is not supposed to defend any specific interests. The rationale for the existence of such a chamber is merely the duplication of legislative power institutions. Therefore, the role of such a Senate is primarily to perform the same or a similar role to that of the lower chamber – mainly the approval of legislation and control of the executive power, as well as creation powers, although the specific powers (and their significance) of both chambers can differ, particularly in the matter of executive power scrutiny.

The central argument is that, within a multi-level political system, the Senate functions as an actor in the national political arena, comparable to the lower chamber (Chytilek 2005: 106–107). A rational voter, therefore, should prefer candidates representing the same or similar ideologies and views of what national politics should look like when voting for both chambers of the parliament. For instance, a right-leaning voter who favours a smaller state and lower taxation should vote for the party that promotes their preferred policy in both the lower chamber and the senate elections, since both chambers decide the level of taxation (despite the asymmetrical nature of Czech bicameralism).

This approach assumes that in a territory where a particular political party has strong support in the lower chamber elections, a senatorial candidate nominated by the same political party should succeed. For the purposes of this study, the results of the Chamber of Deputies elections were aggregated at the level of the Senate constituencies. A potential issue is that voters' preferences in a given area may change over time. Moreover, observed differences could stem from the distinct nature of the two types of elections – for instance, differences in electoral systems or voter turnout. Therefore, instead of a simple comparison of the results of the two types of elections in the same area, the method of stable spatial electoral support is employed (see Pink & Voda 2014). The area of electoral support is defined in this work as the Senate constituencies where the party achieved the highest percentage gains in the lower chamber election and cumulatively gained 25% of its vote. An area of *stable* electoral support is defined as the set of constituencies that belong to the electoral support area of a given party in elections held before and after the Senate election under analysis (see Appendix D).

This approach identifies the stronghold areas of each political party within a given period. Suppose the Senate is seen as an institution of the national political arena where political parties are dominant. In that case, the senatorial candidates nominated by the respective political party should succeed in these

strongholds. In the dataset, the variable *party's stronghold* indicates whether the candidate is running for a party that lists the given Senate constituency as part of its stable electoral support area.

The effect of the perception of the Senate as a national-level political institution is then measured in an additional way. According to the theory of horizontal separation of powers, the Senate should be an institution that counterbalances the power of the lower chamber. The Senate's role, perceived in this way, should then be reflected in the fact that governing parties are penalised, as predicted by the theories of second-order elections and the electoral cycle (Reif 1984; Reif & Schmitt 1980), which have been confirmed in the Czech context (Kovář 2016).

The confirmation of the penalising effect of the governing parties, nevertheless, does not necessarily mean that the Senate is primarily perceived as an actor in the national politics arena. Penalisation of governing parties is common in second-order elections across various levels of government. However, if the described perception of the Senate were to hold true, we should observe a penalising effect of the governing parties regardless of the electoral cycle. In other words, the opposition effect should not be the result of the mere influence of the electoral cycle (e.g. see Müller & Louwerse 2020) but of the balancing effect of the power of the lower chamber. The variable *opposition candidate*, therefore, measures the effect of an opposition candidate across electoral cycles, indicating whether a candidate was or was not the opposition party's candidate. In alternative models, several alternative ways are used to measure the effect of the opposition candidate (see Appendix E, p. 5).

The Senate as a chamber of territorial representation

Senate elections are highly personalised due to the majoritarian electoral system (Malcová 2012). In such a system, the specific characteristics of candidates are especially important (Cain, Ferejohn & Fiorina 1987: 9). If the Senate is perceived as an institution that primarily represents territorial interests, candidates with characteristics suggesting that they are professionally familiar with the given region and its challenges, and therefore, would be able to advocate for the region in the Senate and promote its interests, are expected to be successful in the Senate elections.

Candidates with experience in local or regional politics may certainly be considered as such. Therefore, one of the variables considers whether a candidate held a position as a local or regional politician/prominent regional government official at the time of the elections – specifically, the position of mayor, regional governor or head of a county office.[4] The variable does not include ordinary

4 The position *of head of a county office* ceased to exist along with the county offices. Only candidates between 1996 and 2002 could have held this position.

members of municipal or regional councils, as these positions are not highly visible to voters.[5] To ensure that a candidate is familiar with the politics of the region and can thus be perceived as a potential representative of the constituency's interests, the variable includes a condition that the candidate is from a constituency they ran in (see Table A3 in Appendix A).

A modified version of the described variable focuses only on mayors of county capital towns/regional capital cities, governors and heads of county offices (the variable does not include mayors of ordinary, smaller municipalities and villages; see Table A3 in Appendix A). A politician who oversees an important territorial institution (either the county capital town or the region itself) and represents a significant part of the constituency is expected to be an ideal candidate for the post of senator if the position is perceived as representative of the constituency. In fact, in many bicameral systems, it is the representatives of regional or, in the case of federations, state institutions who are delegated to the upper chamber (for instance, the German Bundesrat is established in a similar manner).

From the perspective of the theory of descriptive representation, we can also assume that a senator elected to advocate for the interests of a senate constituency should come from that constituency. As Gimpel, Karnes, McTague and Pearson-Merkowitz (2008) argue, voters may automatically assume that candidates from their locality will serve local interests, even though they do not have specific powers to represent a particular geographic area. Therefore, another measured independent variable is the *candidate's permanent residence*, which is also indicated on the ballot (see Table A4 in Appendix A).

A *candidate of a regional party* is another type of candidate expected to be perceived as a good representative of regional interests (see Table A4 in Appendix A). Regional parties are not strong entities in Czech politics, but they can achieve limited success in regional elections. Alternatively, they cooperate with the main political parties (Folvarčný, Hruška & Pink 2025), as is also the case in Senate elections. Therefore, all nominating parties of all Senate candidates were considered first to identify regional parties. For that, support was provided by previous work that had already focused on the identification of Czech regional parties (Chlupáč 2015). However, contrary to Chlupáč's approach, parties representing Moravianism in Czech politics were also considered regional parties. In ambiguous cases, the emphasis was on the programmatic grounding of a given party.

5 For practical reasons, it is not possible to determine whether a candidate previously held such a role or whether a candidate held the position but did not report it on the ballot. Nevertheless, the fact that this information is typically included on the ballot (candidates frequently list such positions as part of their occupational background) increases the probability that voters are aware of it at the time of the election. Moreover, a candidate holding the office of a local or regional politician (or a prominent regional government official) at the time of the election further increases the probability that the candidate is perceived as having relevant experience in addressing the current issues facing the constituency, rather than merely past concerns.

The Senate as a Chamber of Wisdom and independent oversight

The Senate, functioning as the Chamber of Wisdom, is expected to perform a controlling role. However, this control should not be influenced by political parties and should be exercised by senators with a specific set of characteristics. As the Senate is supposed to perform independent control in this role, independent candidates are expected to be preferred. Therefore, the two following independent variables are measured. The first one considers *candidates' party membership* – i.e. whether a candidate is a member of a political party. Nevertheless, in the Senate elections, many candidates, although non-partisan, still represent a particular party that nominated them. Therefore, to assess the Senate's independent nature, the analytical model also includes an alternative variable indicating whether a candidate ran as an independent without a *party nomination*.

As the often-used label suggests, the wisdom of senators is also part of this particular perception of the Senate. This characteristic, however, is difficult to measure. The only information, albeit imperfect, available in this regard is that of the candidates' education, specifically the degrees they hold. The concern is that bachelor's and master's degrees have become quite common in Czech society over time. On the other hand, doctoral and higher degrees may be considered prestigious degrees demonstrating candidates' above-average cognitive ability. The impact of education and wisdom through degree attainment is measured in this paper in two alternative ways, with emphasis on higher academic degrees. The first variable is ordinal, where more weight is given to higher degrees starting with the doctoral degree (including both a so-called small doctorate and a PhD) (1), continuing with the associate professor ('docent') title (2) and the professor title (3). In theory, the higher the academic degree a candidate holds, the wiser and more educated they should be perceived by voters. The alternative variable is a binary indicator of whether the candidate holds the *title of professor*. This (the highest) academic title is highly prestigious and reserved for the most eminent experts in their fields.

As Hruška and Balík (2025a) note, the perception of the Senate as the Chamber of Wisdom has a clear elitist character. Not only wise candidates but also successful candidates who have accomplished something in their lives and thus enjoy a certain prestige are expected to be perceived as suitable senators. At the same time, McDermott (2005) and later others (e.g. Campbell & Cowley 2014) demonstrated that occupation may play an important role as a shortcut in low-information decision-making, as voters can infer the candidate's ability and qualifications to hold political office from it. According to Atkeson and Hamel (2020), the relationship between a candidate's profession and the specific office they are running for is important. In this study, two variables derived from candidates' occupational backgrounds are used to capture prestige indicators.

The first binary variable focuses on generally *prestigious occupations*. Prestigious occupations are defined as those considered prestigious by citizens themselves (CVVM 2019). Czech citizens consistently identify (by a clear margin from the others) the following five occupations as the most prestigious: doctor, nurse, university teacher, elementary school teacher and researcher/scientist.[6]

A possible concern is that occupational prestige affects electoral success regardless of how the Senate is perceived. Therefore, a candidate's occupation is approached in an alternative way that arguably better fits the theoretical role of the Senate as a Chamber of Wisdom. Interviews conducted by Hruška and Balík (2025a) suggest that, within such a conception of the Senate, it should be composed of strong personalities with prior experience in holding important positions. Such positions reflect the candidate's (especially professional) experience, wisdom and personal accomplishment. Various leadership roles – such as director positions – can be seen as roles that require wisdom, responsibility and other relevant abilities. At the same time, these should be leadership positions in institutions known to the electorate and, ideally, demonstrate that the candidate has served the public interest. Accordingly, this binary variable, based on the candidates' occupations, indicates whether a candidate was listed as a director or another leadership role at a public, well-known institution (including the institution's name, except for schools). These primarily include directors of hospitals, schools, theatres, regional fire departments, national parks, zoos, charities, trade unions, university rectors, deans of faculties, heads of professional organisations and institutes, or directors of national government bodies.

The candidates' experience is also reflected in their age. At the same time, however, age does not automatically imply professional experience. In addition, the possibility of running for the Senate only from age 40 ensures that all candidates have some experience. In this respect, a positive effect of age on candidates' electoral success is not expected.[7]

Mandate defence and gender are included as control variables. Incumbents who defend their mandate have the advantage of being better known and more visible. The preference for defending candidates is also confirmed by existing research (e.g. Eggers & Spirling 2017; Uppal 2010), including in the Czech context (but in the PR electoral system) (Voda 2014).

6 In this study, the prestigious occupations also include high school teacher (which is not part of the CVVM surveys) and occupations that imply simultaneous performance one of the mentioned prestigious occupations (e.g. school principal, who must also be a teacher, or dean of faculty, who must also be a university teacher or researcher).

7 This was confirmed by the absence of a linear relationship between age and the two dependent variables as well as the absence of a any meaningful correlation. Therefore, age is not included in the models.

Dependent variable(s)

For the dependent variable – the success of a candidate in the Senate election – several alternative ways of measuring this concept exist, each with certain limitations. The first option is to measure electoral victory, i.e. winning the mandate. However, this approach has a major drawback, as the second round operates under a different logic than the first and is typically influenced by a range of additional confounding factors – for instance, the closeness of the election, the similarity or dissimilarity of the two advancing candidates, and their ideological distinctiveness. Turnout also declines significantly, and therefore, the composition of the voters differs in the second round.

For many candidates, simply advancing to the second round can already be regarded as a significant achievement. Furthermore, given the limitations of the approach outlined above, regression models that assess the impact of independent variables on the likelihood of reaching the second round can capture a larger share of the variation in the dependent variable, providing a more nuanced understanding of the factors influencing candidate success. For these reasons, both alternative approaches to measuring dependent variables are employed, and two sets of logistic regression models are calculated, each offering slightly different explanatory value. At the same time, comparing the effects of the independent variables across the two models with different dependent variables can signal the robustness (or sensitivity) of those effects to intervening factors that come into play between the first and second rounds.[8]

Results

General effect of independent variables

Influence of national-level politics and political parties

The regression model (see Table 1) suggests a considerable importance of political partisanship in Senate elections. Analysis of all Senate elections shows that if a candidate ran in a constituency that their supporting party could claim as a *stronghold*, their chances of advancing to the second round increased fourfold. Based solely on this result, we cannot assert that voters clearly perceive the Senate as an institution operating within the national political arena. However, the evidence does indicate that in the constituencies where such an effect would be most expected – party strongholds – political parties exert a strong influence

8 Measuring a senator's success through percentage gains is not reasonable since such results strongly depend on the number of candidates running in each electoral contest. This number varies widely not only across time but also across constituencies.

on voters' perceptions of the Senate. Table 2 shows that this predictor also had a substantial effect on the candidate's chance of winning the seat.

The relative decline in the effect of this independent variable between advancing to the second round and being elected can be explained by the factors already discussed: The second round of Senate elections occurs in a different context, where additional variables come into play. Nevertheless, the positive effect remains substantial, and candidates representing political parties in their parties' strongholds continue to enjoy a significant advantage.

The influence of political parties in Senate elections is further confirmed by the positive effect observed for *candidates representing opposition parties*. Such a candidate was 1.5 times more likely to advance to the second round and 1.7 times more likely to win a seat than other candidates. While this effect is not as large as the *party stronghold* effect, it fluctuates widely across different years (see section 4.2). Moreover, it seems immune to factors that come into play between the first and second rounds, as it better explains a candidate's victory than just their advancement to the second round.

The opposition candidate effect holds regardless of the election cycle. The alternative variable, which measured the effect of an opposition candidate only in midterm elections (see Tables A7 and A8 in Appendix A), also had a positive effect on the candidate's chance of advancing to the second round. The same applies to the variable's effect on the candidate's chance of winning the seat. Another alternative variable, most accurately capturing the theory of the electoral cycle, predicted that government candidates would be preferred during the honeymoon period, as government support does not generally decline during this time but often even increases. In the alternative model (see Tables A9 and A10 in Appendix A), this variable has an effect similar to that of the *opposition candidate*. The results described distinguish Senate elections from other second-order elections and suggest that the Senate may not be a typical second-order institution, as Chytilek (2005) argued. In other words, the general effect of an *opposition candidate*, regardless of the election cycle, confirms the assumption that the Senate is, to a considerable extent, seen as a counterbalancing institution to the lower chamber and, thus, an actor of national-level politics.

This claim is additionally confirmed by the variable monitoring whether a candidate (either partisan or non-partisan) was *nominated by one of the main political parties* of the Czech party system (see Tables A17 and A18 in Appendix A). If a candidate was nominated by such a party, their chances of advancing to the second round of the election increased almost seven times compared to other candidates, and their chances of winning the election increased 3.5 times.

Table 1: Effect of independent variables on candidates' chances to advance to the second round

Variables in the Equation[9]	B	S.E.	Wald	Sig.	Exp(B)	95% C.I. for EXP(B) Lower/Upper	
Party´s stronghold	1.406	.130	117.662	<.001	4.078	3.163	5.257
Opposition party candidate	.405	.097	17.384	<.001	1.500	1.240	1.814
Mayor/governor in constituency	1.476	.128	132.633	<.001	4.374	3.403	5.623
Residency in constituency	.130	.120	1.179	.278	1.139	.900	1.441
Regional party	-.599	.230	6.801	.009	.549	.350	.862
Non-partisan	-.422	.098	18.698	<.001	.656	.541	.794
Degree	.238	.089	7.138	.008	1.269	1.065	1.511
Degree professor	-.363	.322	1.271	.260	.695	.370	1.308
Prestigious occupation	.289	.122	5.605	.018	1.335	1.051	1.695
Occupation director	1.016	.169	36.251	<.001	2.763	1.985	3.847
Mandate defence	2.365	.178	177.015	<.001	10.640	7.510	15.074
Gender	-.042	.119	.128	.720	.958	.760	1.209
Constant	-1.832	.162	128.272	<.001	.160		

Source: Author

Regional dimension

Another set of independent variables examines whether voters perceive the Senate as a regional chamber and, therefore, whether they vote for candidates who are well-suited to advocate for the constituency's interests. The first such predictor tested the effect of a *mayor/governor/head of a county office's position*. Such candidates were more than four times as likely as other candidates to advance to the second round. This effect does not weaken in the second round, as the chance of a *mayor/governor/head of a county office* to win a seat is then 4.5 times higher. The strong positive effect and the stability of the effect across the two rounds of elections signal voters' preference for candidates with experience in local or regional politics within a given constituency, and thus a certain regional character of the Senate in public perception.

9 For binary variables, the reference category (0) is always 'No' (the candidate does not possess the given attribute), while 'Yes' (the candidate possesses the given attribute) is coded as 1. For instance, for *Mandate defence*, the reference category (0) means the candidate does not defend the mandate. Thus, the table always shows the effect if a candidate possesses the attribute in question compared to a candidate who does not possess the attribute. For the variable *Gender*, the reference category (0) is female. The same approach was applied in all other models (including models in Appendix A).

An ideal candidate to represent the interests of a constituency in the Senate is arguably a *mayor of a county capital town or a regional capital city, a governor or a head of a county*. Because of their position, these prominent local or regional politicians/government officials already represent a large share of (or even the entire) constituency. The effect of this variable has indeed proved (in an alternative model, see Table A11 and A12 in Appendix A) to be positive and very strong – such candidates were 7.4 times more likely to advance to the second round and 4.4 times more likely to win the seat. Such a strong effect suggests that the potential ability of senators to represent their constituency's interests is important to voters. This again implies that many voters may perceive the Senate as a kind of regional upper chamber.

The counterargument may be that these candidates are not preferred because of their greater ability to represent their constituency in the upper chamber, but simply because they are visible and well-known in the given area. That was also mentioned, to some extent, during several interviews with members of the general public (Hruška & Balík 2025a). On the other hand, local and regional politicians running for the Senate often refer to their experience in local/regional politics in their campaign and position themselves in the role of potential ombudsman of the constituency

Nevertheless, as a robustness check, an alternative variable was tested in another model to confirm the relevance of the regional dimension effects. The alternative variable indicates whether a candidate is a *mayor of a smaller municipality*. It thus excludes mayors of counties or regional capital cities, governors and heads of county offices – compared to these candidates, candidates with the position of mayor of a smaller municipality cannot base their success on mere familiarity, visibility and reach. The alternative model (see Tables A13 and A14 in Appendix A) showed that if a candidate was a mayor of a smaller municipality at the time of the election, their chance of advancing to the second round was 2.7 times higher, and their chance to win a seat was then even 3.4 times greater compared to the other candidates. Although the effect has weakened, it remains significant and strong, which suggests that even local politicians who could not benefit from their familiarity as regional leaders were clearly advantaged by voters in the Senate elections. A plausible explanation is that they were seen as suitable representatives of the constituency due to their experience in local politics. This line of reasoning was used in the interviews with senators (Hruška & Balík 2025b), who were encouraged by their peers to run in the Senate election because of their extensive experience in local politics and knowledge of the region, even though they were mayors of smaller municipalities. After being elected, they began performing the ombudsman role for the constituency.

The variable indicating whether the candidate resides in the constituency they are running in has almost no effect on their chances of advancing to the second round or winning the seat. This result is probably because the vast majority of

candidates (80.4%) resided in the constituency in which they ran. On the other hand, candidates who do not reside in the constituency occasionally succeed.

The last measured variable related to regional representation is *regional party support*. However, it does not improve a candidate's chances of advancing to the second round or of winning the election. On the contrary, the effect is negative. It does not automatically imply that voters perceive regional party support for a Senate candidate as aggravating and thereby signal their opposition to the perception of the Senate as a regional chamber. A more plausible explanation is that regional parties are not significant actors in Czech politics, not even at the regional level (see Folvarčný, Hruška & Pink 2025).

Table 2: Effect of independent variables on candidates' chances to win the seat

Variables in the Equation[10]	B	S.E.	Wald	Sig.	Exp(B)	95% C.I. for EXP(B) Lower/Upper	
Party´s stronghold	1.173	.141	69.416	<.001	3.231	2.452	4.257
Opposition party candidate	.547	.119	21.072	<.001	1.728	1.368	2.183
Mayor/governor in constituency	1.499	.146	105.544	<.001	4.478	3.364	5.960
Residency in constituency	-.091	.151	.365	.546	.913	.679	1.227
Regional party	.106	.247	.182	.670	1.111	.684	1.805
Non-partisan	-.118	.123	.926	.336	.888	.698	1.130
Degree	.217	.110	3.862	.049	1.242	1.001	1.541
Degree professor	-.381	.408	.871	.351	.684	.307	1.520
Prestigious occupation	.177	.157	1.276	.259	1.194	.878	1.625
Occupation director	1.073	.196	29.934	<.001	2.924	1.991	4.294
Mandate defence	1.788	.170	110.745	<.001	5.980	4.286	8.343
Gender	-.041	.150	.073	.786	.960	.716	1.288
Constant	-2.691	.206	171.083	<.001	.068		

Source: Author

The Chamber of Wisdom

Within the Chamber of Wisdom perception, we expect that *non-partisan* or fully *independent candidates* would be preferred. However, the election results do not confirm this. On the contrary, as Tables 1 and 2 show, a *non-partisan candidate* is less likely to succeed in Senate elections. A nonpartisan candidate had

10 Nagelkerke R^2 = 0.175; Cox & Snell R^2 = 0.095 (model´s sig. < 0.001).

only a 65% chance of advancing to the second round compared to a partisan candidate. The candidate's chance of winning a seat was less affected. *Independent candidates* not nominated by a political party had an even lower chance of succeeding in the election, according to both models (see Tables A15 and A16 in Appendix A). The size and direction of the effects thus do not suggest that the apolitical nature of the candidates had a general positive effect on their electoral success.

However, the observed effects of both variables may be influenced by other factors. The negative effect of *independent candidates* can, at least partly, be explained by the relative ease of meeting the candidacy threshold – an independent candidate only needs a petition signed by at least 1,000 eligible voters in the constituency. As a result, many constituencies see independent candidates repeatedly running despite having little realistic chance of success. These candidates may not aim to win, but rather to raise their own profile. The presence of such candidates can, in turn, reduce the apparent effect of serious independent candidates who do have a realistic prospect of electoral success, although the distinction between the two types of independent candidates is not always clear.

An alternative model, which examined a modified variable capturing only *non-partisan candidates nominated by political parties*, revealed no significant effect. This could be due, at least in part, to the fact that many smaller parties also nominate non-partisan candidates, while these parties are often marginal and their candidates have little to no chance of success. Thus, to investigate further, the effect of non-partisan candidates was tested in an additional model using data that included only *candidates – both partisan and non-partisan – nominated by one of the main political parties* of the Czech party system (see Tables A19 and A20 in Appendix A). Nevertheless, no substantial effect was found for such candidates either. Overall, these findings suggest that voters did not generally favour non-partisan candidates in Senate elections.

Two additional measured variables consider the candidates' degrees, referring to the education and potential wisdom of their holders, and simultaneously to the Senate's general elitist character. The ordinal variable measuring the effect of *doctoral and higher degrees* has a positive effect on a candidate's electoral success. As the degree increases by one category, the chance of a candidate advancing to the second round of the election increases almost 1.3 times. This variable had an almost equally large effect on the candidate's chance of winning the seat. Thus, the chances of a candidate with a professor's degree advancing to the second round or winning the seat increased 1.8 times compared to a candidate with less than a doctoral degree (or no degree). However, it cannot be ruled out that this effect is not solely related to the Senate elections, a possibility that was, in fact, confirmed by Voda (2014).

An alternative variable that measured only the effect of the *degree of professor* does not have a positive effect on candidate success. On the contrary,

candidates who were not professors were more likely to advance to the second round and to be elected. An explanation for this discrepancy may be that there are relatively few candidates with a professor's degree (94), and that other (lower) degrees, which are more represented in the data – especially doctoral degrees (879) – substantially influence the effect of the ordinal variable elaborated above.

The perceived elite character of the upper chamber and its members was also examined through a variable that monitors the prestige of candidates' occupations. Candidates practising a *prestigious occupation* had higher chances of succeeding. If candidates listed a prestigious occupation on their candidate list, their chances of advancing to the second round of the election increased 1.3 times. The positive effect on winning the election was smaller. Nevertheless, as with candidate education, preferences for candidates with prestigious occupations may not be related to specific perceptions of the Senate's role. Such candidates may also be preferred in other elections (see Voda 2014).

A more specific variable, closely related to the perception of the chamber as composed of wise, experienced and accomplished individuals, is whether a candidate holds *the position of director of a public institution or a similar leadership role* (see section 3.3). Such candidates were 2.8 times more likely to advance to the second round, while the chance of winning the election was three times higher. The substantial positive effect of this variable across multiple models provides strong evidence about the types of candidates voters tend to favour in Senate elections. Professional experience, personal abilities and prior public exposure appear to play a key role in shaping perceptions of a suitable Senate candidate, a pattern that aligns with senators' accounts (see Hruška & Balík 2025b). Nevertheless, it remains unclear whether this effect reflects voters' specific perceptions of senators and the Senate, or the broader personalisation of elections inherent in the given electoral system.

Evolution of effects in time

Given the Senate's ambiguous and somewhat compromised position, perceptions of its role may have shifted over time. Citizens' views of political institutions develop gradually, shaped not only by the institution's performance across different contexts but also by factors such as its self-presentation and that of its members. These perceptions are further influenced by general political knowledge as well as specific knowledge of the Senate, both of which can change over time at the individual and societal levels. Accordingly, this section examines the effects of each variable over time, offering a more nuanced understanding of how the Senate is perceived.

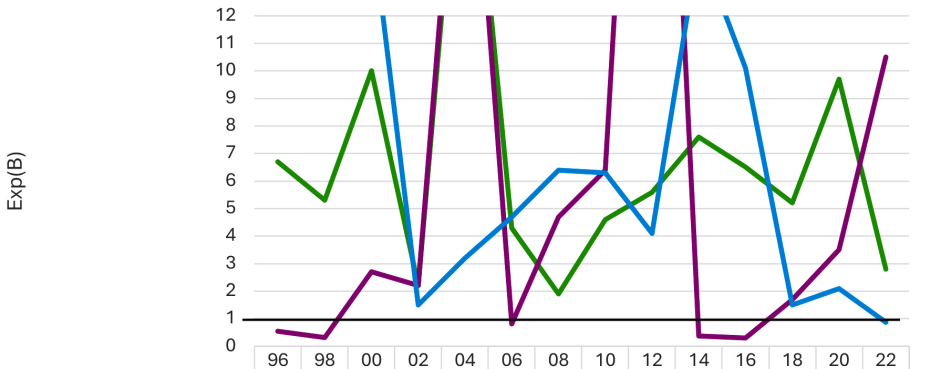
With that aim, the effects of the independent variables were estimated for each regular Senate election (the results of the individual regression models are

presented in Appendix A). The evolution of the effects' sizes is then presented in time plots (Figures 2–7).[11]

Influence of national-level politics and political parties

Neither Figure 2 nor 3 show that the effect sizes of the variables signalling the influence of national-level politics on Senate elections form a clear long-term trend. This is especially true for the effects of the *party's stronghold* and *opposition candidate* variables on both types of observed dependent variables. The effects of the variables are unstable in both graphs; instead, the effect sizes fluctuated considerably over time. Nevertheless, they still indicate a general large effect of political parties in Senate elections.

Figure 2: Changes of independent variables' effects on a candidates' chances to advance to the second round over time – influence of national-level politics



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Party´s stronghold	6,7	5,3	10	2,2	21,8	4,3	1,9	4,6	5,6	7,6	6,5	5,2	9,7	2,8
Opposition candidate	0,54	0,32	2,7	2,2	23,2	0,82	4,7	6,4	35,4	0,37	0,3	1,7	3,5	10,5
Main party cand.	99	83,9	15,4	1,5	3,2	4,7	6,4	6,3	4,1	14,6	10,1	1,5	2,1	0,87

Year of the Senate election

Source: Author

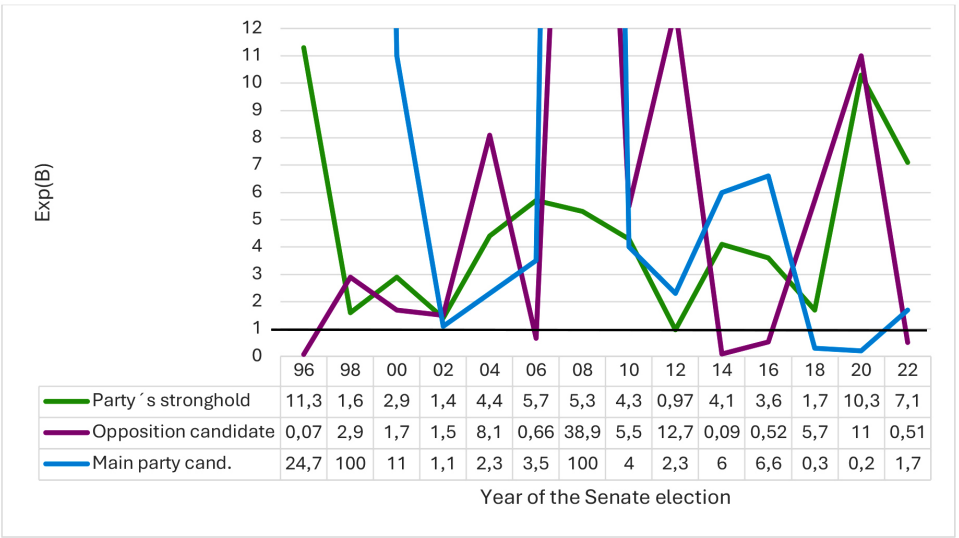
The overall effect of the variables discussed in the previous section can be considered as an average, from which the effects often deviate significantly in individual elections. In particular, the effect of an *opposition candidate* seems to be more important than the original regression model indicated. In the extreme case of the 2012 election, an opposition candidate was even 35 times

11 A limitation of this procedure is the smaller number of cases in each model. This makes the data more sensitive to the occurrence of seemingly strong effects. In the case of some binary variables (notably mayor of a county capital or governor, regional party, degree professor, occupation director) that took only one of two values, this led to either zero or, conversely, extreme values of the observed effect. Therefore, the effect size for these variables should be interpreted with caution and viewed more as a general direction of an effect.

more likely to advance to the second round compared to the candidates of the governing (and other) parties. This effect reflects the great success of the ČSSD, which was then in opposition and managed to get its candidates into the second round in 23 out of 27 constituencies. This dominance of the opposition was certainly fostered by the problems of the then centre-right government, which was heading from crisis to crisis at that time.

The same variable had a similarly extreme effect in the 2008 election, when an opposition candidate was 39 times more likely to be elected than the other candidates. This effect occurred during the Senate election, often labelled the so-called 'orange tsunami' due to the overwhelming dominance of the social democrats (ČSSD). On the other hand, in five elections (1996, 1998, 2006, 2014, 2016), the effect of an opposition candidate on the candidate's chance to advance to the second round was negative,[12] and in four elections (1996, 2006, 2014, 2016), there was a negative effect on the candidate's chance to win the election. However, the existing effect (in both directions) still confirms the considerable influence of political parties on Senate elections. The elections in which political parties played the smallest role in voters' decision-making were those in 2002 (see Figures 2 and 3).

Figure 3: Changes of independent variables' effects on candidates' chances to win the seat over time – influence of national-level politics



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Party´s stronghold	11,3	1,6	2,9	1,4	4,4	5,7	5,3	4,3	0,97	4,1	3,6	1,7	10,3	7,1
Opposition candidate	0,07	2,9	1,7	1,5	8,1	0,66	38,9	5,5	12,7	0,09	0,52	5,7	11	0,51
Main party cand.	24,7	100	11	1,1	2,3	3,5	100	4	2,3	6	6,6	0,3	0,2	1,7

Source: Author

12 However, for instance, during the 2006 Senate election, when ODS was formally in government, the cabinet had been appointed only shortly beforehand, and the outcome may therefore still partly reflect reactions to the preceding ČSSD-led government.

An interesting case regarding the effect of an opposition candidate is the 2022 election. In this election, we observe a big difference between the effect of an opposition candidate on advancing to the second round and on winning the election. Opposition candidates were 10.5 times more likely to advance to the second round than other candidates. However, at the same time, they had only a 50% chance of winning the seat compared to candidates of governmental (and other non-parliamentary) parties. This seeming paradox is a good illustration of the Senate elections (and the Czech party system in general) of recent years. The dominant ANO party is frequently able to advance its candidates to the second round, owing to consistently high levels of support relative to other parties. However, due to the considerable controversy surrounding the party and its leader, Andrej Babiš, most voters tend to support the opposing candidate in the second round, effectively voting against ANO candidates. This provides a clear illustration of the classic dynamics of a two-round majority voting system: Radical or otherwise controversial parties and candidates are systematically disadvantaged under this system.

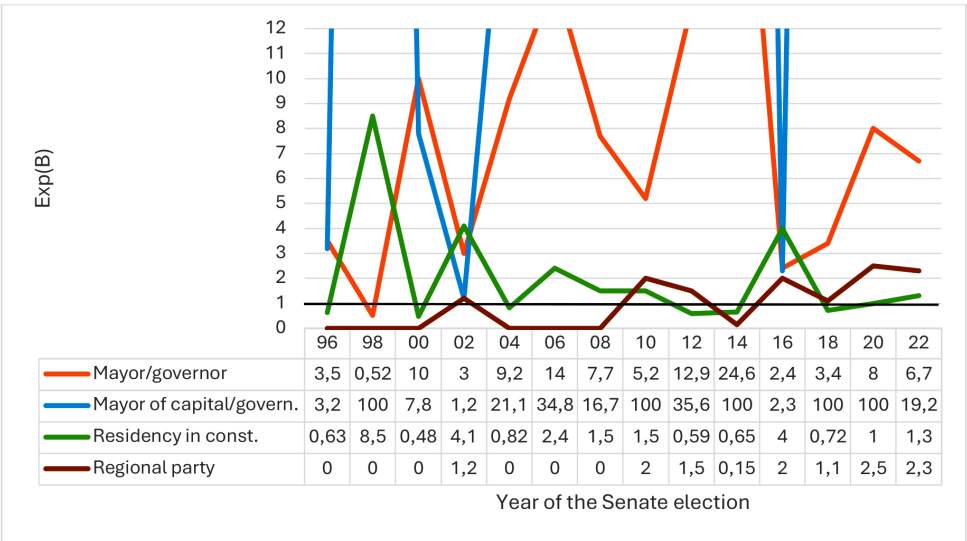
At least a tentative trend can be observed for the variable *candidate of the main political parties*. Figures 2 and 3 show that the main political parties exerted the greatest influence in the first two Senate elections. To illustrate, in 1996, out of 210 candidates not from the main political parties, only two made it to the second round! Then, in 1998, all 27 Senate seats were won by candidates of the main political parties. By contrast, in 2002, candidates representing major parties experienced a substantially smaller boost in their chances of success. This pattern aligns with the effects observed for the variables described earlier. One possible explanation is voter dissatisfaction with politics, particularly with the main political parties, following the Opposition Agreement period. However, if this were the case, we would expect the effect to have already been apparent in 2000, which it was not. In the subsequent years, the influence of the main political parties increased once again, coinciding with the blue and later orange tsunamis. From 2018 onwards, as illustrated in Figures 2 and 3, the electoral prospects of candidates from the main political parties have shown a relative decline, with the effect even turning negative in some instances. These results correspond with what some senators reported in the interviews conducted by Hruška and Balík (2025b), namely that voters in recent years have come to perceive the Senate less as a partisan chamber and more as a body of strong, independent personalities.

In general, this section suggests that political parties and national-level politics exert a strong influence on voter decision-making in Senate elections. However, the magnitude – and, in the case of opposition candidates, the direction – of this effect appears to depend on the broader political context and likely on additional factors beyond those examined in this study. At the same time, there are indications that voters' perceptions may be shifting in recent years, as the influence of political parties in Senate elections appears to be weakening.

Regional dimension

Figures 4 and 5 show no clear trend over time for the variables expected to signal regional perceptions of the Senate. The only exception may be the regional party effect. Candidates running with the support of a regional party had, over time, a progressively increasing chance of success in elections. While in the first half of the Senate's existence, the regional party effect was clearly negative, since 2010, we have observed an increasingly positive effect of this variable. This applies to the effect on advancing to the second round and on winning the seat. However, this trend is far from linear – we still observe declines after 2010 (see Figures 4 and 5).

Figure 4: Changes of independent variables' effects on candidates' chances to advance to the second round over time – regional dimension



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Mayor/governor	3,5	0,52	10	3	9,2	14	7,7	5,2	12,9	24,6	2,4	3,4	8	6,7
Mayor of capital/govern.	3,2	100	7,8	1,2	21,1	34,8	16,7	100	35,6	100	2,3	100	100	19,2
Residency in const.	0,63	8,5	0,48	4,1	0,82	2,4	1,5	1,5	0,59	0,65	4	0,72	1	1,3
Regional party	0	0	0	1,2	0	0	0	2	1,5	0,15	2	1,1	2,5	2,3

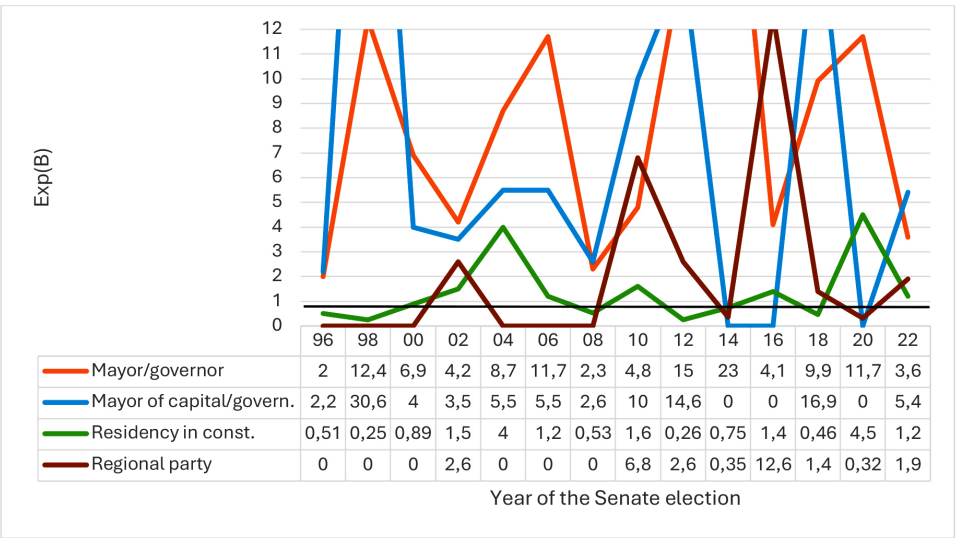
Source: Author

One factor that may partly explain this trend is the relatively late establishment of regions in 2000 and the consequent delay in the development of regional identities, which are crucial for the emergence and influence of regional parties (Folvarčný, Hruška & Pink 2025). Another explanation may lie in a strategic shift by regional parties. They appear to be more successful not only in Senate elections, but also when cooperating with one or more main political parties by nominating or supporting a single joint candidate. Overall, there seems to be a growing tendency toward cooperation among different actors in Senate elections, sometimes involving regional parties.

It is unclear whether the increasing electoral success of candidates supported by regional parties reflects a change in the perception of the Senate. This could be corroborated by trends in the effects of other variables, but none are observed. Other variables associated with the regional dimension of the Senate fluctuate considerably over time. This also applies to holding the position of mayor, governor or head of a county office, which has at least always increased candidates' chances of success in Senate elections (except in 1998).

To conclude this subsection, candidates possessing characteristics likely to be perceived by voters as suitable representatives of their constituency generally enjoyed a considerably higher chance of success in Senate elections. However, the magnitude of this positive effect varied substantially from election to election, and, apart from the effect of regional party support, no clear trend is visible.

Figure 5: Changes of independent variables' effects on candidates' chances to win the seat over time – regional dimension



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Mayor/governor	2	12,4	6,9	4,2	8,7	11,7	2,3	4,8	15	23	4,1	9,9	11,7	3,6
Mayor of capital/govern.	2,2	30,6	4	3,5	5,5	5,5	2,6	10	14,6	0	0	16,9	0	5,4
Residency in const.	0,51	0,25	0,89	1,5	4	1,2	0,53	1,6	0,26	0,75	1,4	0,46	4,5	1,2
Regional party	0	0	0	2,6	0	0	0	6,8	2,6	0,35	12,6	1,4	0,32	1,9

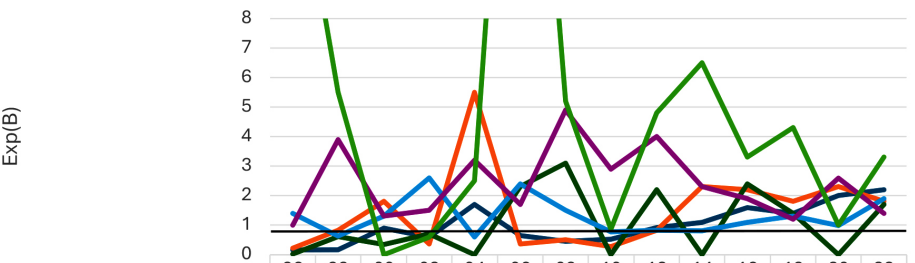
Source: Author

The Chamber of Wisdom

As shown above, a non-partisan candidate generally did not have a higher chance of succeeding in the Senate elections. On the contrary, the overall effect of this variable was negative. However, Figures 6 and 7, which depict the evolution of the effects over time, show that this variable's effect on a candidate's success in the election has been changing. The negative effect is particularly evident in the early years of the Senate. This applies to both advancing to the second round of the election and winning the election. In the subsequent period, the effect of

being a non-partisan candidate was neither substantially positive nor negative. However, from 2016 onwards (for the effect on a candidate's advancement to the second round), we observe a substantive increase in the effect, which becomes positive. In the 2022 election, the non-partisan candidate was then 2.2 times more likely to advance to the second round compared to other candidates.

Figure 6: Changes of independent variables' effects on candidates' chances to advance to the second round over time – the Chamber of Wisdom



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Non-partisan	0,16	0,17	0,9	0,59	1,7	0,64	0,46	0,52	0,92	1,1	1,6	1,4	2	2,2
Non-part. (main parties)	0,22	0,82	1,8	0,36	5,5	0,37	0,5	0,28	0,83	2,3	2,2	1,8	2,3	1,8
Independent	0,03	0,62	0,35	0,71	0	2,3	3,1	0	2,2	0	2,4	1,4	0	1,7
Degree	1,4	0,63	1,3	2,6	0,6	2,4	1,5	0,78	0,83	0,81	1,1	1,3	0,99	1,9
Prestigious occup.	1	3,9	1,3	1,5	3,2	1,7	4,9	2,9	4	2,3	1,9	1,2	2,6	1,4
Occup. director	14,4	5,5	0	0,6	2,5	24,2	5,2	0,86	4,8	6,5	3,3	4,3	1	3,3

Year of the Senate election

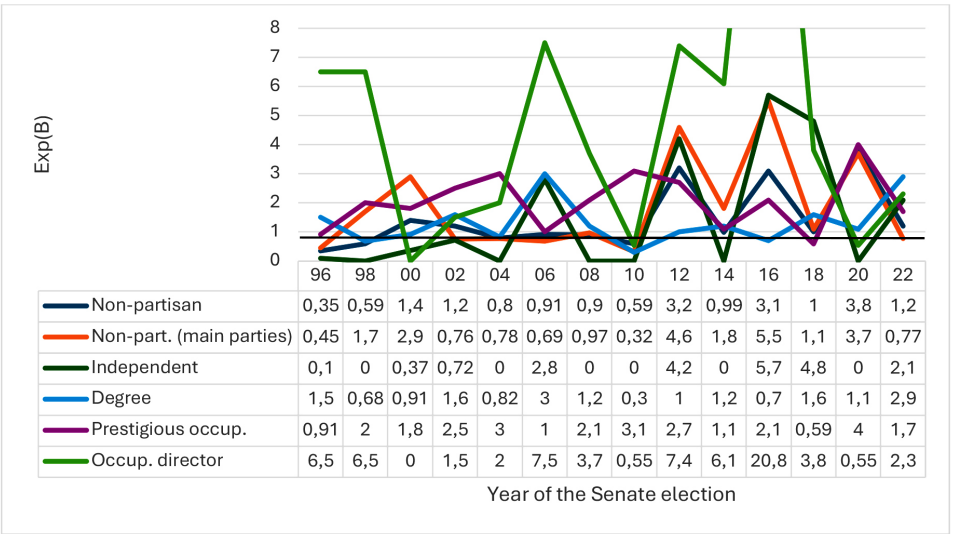
Source: Author

The described trend becomes even more apparent when considering the adjusted variable measuring the effect of *non-partisan candidates nominated by one of the main political parties*. As noted earlier, this variable was introduced to filter out non-partisan candidates with only negligible chances of success. Moreover, as demonstrated in the preceding section, political parties play an important role in Senate elections, as reflected in this adjusted variable. While the overall effect of non-partisan candidates nominated by major political parties appeared neutral in the previous analysis, figures illustrating the development of these effects over time provide a clearer picture of what the non-partisan candidate variable represents. That is, from roughly 2012 to 2014, we observe a substantial increase in the effect that became positive in recent years (the exception being a large and isolated positive increase in the effect on advancing to the second round as early as 2004).

The positive increase in the effect of a *non-partisan candidate* corresponds to the decrease in the effect of a *candidate nominated by the main political party*, described in the first part of this section. It suggests a shift in the Senate's per-

ception towards an institution less dependent on political partisanship. On the other hand, the increasing chance of a non-partisan candidate succeeding in Senate elections may also be associated with the decline in political party membership (Hájek 2019). Even major parties are increasingly forced to co-operate in Senate elections with non-partisan candidates who run with their support. Hruška and Balík (2025b) described the nomination of candidates to the Senate by political parties as a form of headhunting, in which parties often approach candidates with potential to succeed in the election. In effect, however, it still contributes to shaping the Senate into an institution that is relatively less dependent on political parties.

Figure 7: Changes of independent variables' effects on candidates' chances to win the seat over time – The Chamber of Wisdom



	96	98	00	02	04	06	08	10	12	14	16	18	20	22
Non-partisan	0,35	0,59	1,4	1,2	0,8	0,91	0,9	0,59	3,2	0,99	3,1	1	3,8	1,2
Non-part. (main parties)	0,45	1,7	2,9	0,76	0,78	0,69	0,97	0,32	4,6	1,8	5,5	1,1	3,7	0,77
Independent	0,1	0	0,37	0,72	0	2,8	0	0	4,2	0	5,7	4,8	0	2,1
Degree	1,5	0,68	0,91	1,6	0,82	3	1,2	0,3	1	1,2	0,7	1,6	1,1	2,9
Prestigious occup.	0,91	2	1,8	2,5	3	1	2,1	3,1	2,7	1,1	2,1	0,59	4	1,7
Occup. director	6,5	6,5	0	1,5	2	7,5	3,7	0,55	7,4	6,1	20,8	3,8	0,55	2,3

Source: Author

For the other variables, the trend over time is not as apparent. On the contrary, we observe a seemingly random fluctuation. This is especially true for the variables connected to the *candidate's occupation* and *degree*.

Conclusion and discussion

This article examines which candidate characteristics increased their likelihood of success in Czech Senate elections, thereby revealing how voters perceive the Senate and its role within the political system. The analysis identified substantive effects for variables corresponding to all three distinct perceptions of the Senate's role.

First, the influence of political partisanship points to the Senate's role within the horizontal separation of legislative power, where it is seen as a component of the national political arena and an instrument of political oversight. Second, variables linked to the territorial background of candidates and their experience in regional politics reflect a regional dimension of the Senate's role, suggesting that voters may partly view the Senate as a forum for articulating local or constituency interests, despite its limited formal powers in this regard (see Hruška & Čapek 2026). Third, the recurring advantage of elite (and in recent years independent) candidates resonates with the perception of the Senate as a Chamber of Wisdom, a body more detached from party politics and grounded in personal reputation and competence – even though the evidence in this case remains somewhat tentative. These findings are thus in line with previous qualitative work highlighting the multiplicity of meanings attached to the Czech Senate (Hruška & Balík 2025a, Hruška & Balík 2025b).

Moreover, some evolving patterns of electoral behaviour suggest that understandings of the institution may also shift, even without constitutional reform – a conclusion echoed by senators' reflections (see Pithart 2016). The analysed data primarily indicate that the Senate's independent character seems to have strengthened over time. The findings thus provide additional evidence that the way institutions are perceived and enacted in practice may differ from their formal constitutional design. This nuance aligns with the perspective of discursive institutionalism, which understands institutions not merely as external structures constraining actors, but as arenas in which meanings and roles are continuously interpreted and reproduced through discourse (Schmidt 2008; 2010). Such dynamics are particularly salient given the Senate's limited public visibility. Previous research shows that many citizens are only vaguely aware of its powers and functions (Hruška 2023), which likely amplifies the symbolic and interpretive aspects of representation over formal-legal ones. Moreover, this may subsequently affect the institution's perceived legitimacy (Hruška 2026).

By employing a large original dataset – linking lower-chamber electoral outcomes to the level of Senate constituencies – this study also provides a novel empirical contribution to the broader discussion about electoral behaviour in second-order or less salient elections. Senate contests, like other upper-chamber elections across Europe, exhibit unique logics of voter motivation and institutional perception. Understanding these logics is essential not only for interpreting the Czech case but also for theorising how citizens engage with institutions designed to act as checks within democratic systems – a question that remains increasingly pertinent in the current era of democratic erosion (see Just & Charvát 2022; Hruška & Hanley 2026).

Several limitations must nonetheless be acknowledged. The analysis does not directly measure citizens' perceptions of the Senate, but rather infers them from voting outcomes. This indirect approach risks conflating instrumental motiva-

tions with genuine evaluations of institutional roles (for instance, voting for a well-known regional politician may stem from name recognition or personal popularity). Second, the relatively low voter turnout in Senate elections means that voting behaviour reflects only a limited share of the public's perceptions. Furthermore, the characteristics most relevant to the Chamber of Wisdom perception – such as wisdom or independence of judgment – are difficult to capture using the available data. A further limitation concerns the presence of multi-party nominations and ad hoc pre-electoral alliances, which complicate the attribution of party-level electoral support to individual Senate candidates. Despite these limitations, the findings offer valuable insights into the types of candidates preferred by voters and, by extension, into the perceived role of the upper chamber in Czech politics. Combined with qualitative evidence from prior research (Hruška & Balík 2025a), the results help better understand how voters navigate the Senate's triple nature.

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Supplementary files

Appendices can be accessed here:

Appendix A: Descriptive statistics and alternative models, DOI: 10.6084/m9.figshare.31812196

Appendix B: Influence of the different types of constituencies, DOI: 10.6084/m9.figshare.31812292

Appendix C: Candidates in the Czech Senate elections and their characteristics, DOI: 10.6084/m9.figshare.30540587

Appendix D: Areas of electoral support of Czech political parties at the level of the Senate constituencies, DOI: 10.6084/m9.figshare.30540683

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BOOK REVIEW

Making Refugees Political Agency Visible: Practices of the Subject by Amelie Harbisch

NATALIYA-MARIYA MOCHERNAK

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Amelie Harbisch's book, published in January 2025 by Routledge, focuses on the significant role of refugees and asylum seekers in international relations. Harbisch works at the Department of International Politics and Conflict Studies at the University of Erfurt. Her research interests include knowledge production in international relations, ethnographic and participatory methods, forced migration and international political sociology.

This publication contributes to debates on forced migration and the political subjectivity of refugees. Harbisch points to the fact that most traditional literature on international relations has tended to view refugees as a problem rather than as individual subjects. She highlights the absence of an individual approach to refugees as actors in international migration who are part of the international system and argues that the political actions of refugees have significant implications for international relations. The very existence of refugees challenges political and academic notions about the nature of international relations, which are based on established categories such as nation-states and citizenship. The reality of forced migration questions universal democratic principles, which remain unfulfilled in the context of refugees' political rights. According to the author, to fulfill these principles, it is necessary to rethink concepts such as borders and sovereignty, which are constructed by defining refugees as 'others'.

The central argument of the book is that 'in order to understand forced migration, we must understand how refugees emerge as individual human subjects and what political power they have in this process' (Harbisch 2024: 1). In line with the aim of the text, the author formulates two research questions: 'how external constructions create refugees as subjects' and 'how refugees work with, against, or outside these discourses in their everyday practices to become

subjects' (Harbisch 2024: 3). The answer to the first question reveals the ideas about refugees that arise through political discourse, the media and their everyday interactions. The author focuses on the relationship between these often-contradictory ideas (helpless child/dangerous criminal) and the impact of this contradiction on refugees. The second question, on the other hand, reveals refugees' attitudes toward these perceptions and their role in either stabilising or challenging the contradictions inherent in these constructions.

To understand the individual political activity of refugees, Harbisch uses Foucault's concept of subjectivation. She explains subjectivation as a process in which refugees are assigned a specific identity or meaning through external influences, such as bureaucratic procedures for determining refugee status, academic discourse or media discourse. In addition to the concept of subjectivation, the author also employs biopolitics to explain the exclusion of refugees from political life and their reduction to a purely biological existence. Both concepts represent forms of power through which refugees are controlled.

On an empirical level, the book is based on an analysis of media photographs and ethnographic data collected through participant observation and semi-structured interviews with 36 individuals who have undergone the refugee system in Germany (Berlin) and Austria (Vienna). Through quantitative analysis of media photographs, Harbisch provides a systematic overview of photographs that appeared in Austrian and German media during the migration crisis. The total sample consisted of 464 photographs from the archives of two online news servers (Spiegel-Online.de and Krone.at) from 2015 to 2017, in each country. The analysis reveals recurring patterns of depicting refugees as a de-individualised mass of people, refugees controlled and detained by authorities, or refugees as violent criminals who are out of control and represent a threat. There was also a difference between how the media represents refugees, with the Austrian media portraying refugees as suspicious subjects, while the German media portrayed them as helpless. Subsequently, a qualitative analysis of nine selected photographs is presented. It shows how refugees are portrayed as mere death through photographs of deceased persons or persons in life-threatening situations. These photographs support the construction of refugees as incapable and helpless, waiting to be rescued and requiring compassion. Similarly, it is shown how refugees are portrayed as a threat to the host country through photographs depicting uncontrolled masses of people flowing across borders. Harbisch also points to the positive portrayal of refugees through images of refugees in the workplace, confirming their successful integration into the host country's labour market.

While the analysis of media photographs conducted in the second chapter focuses on the construction of meanings attributed to refugees by the media and provides an answer to the first research question, the author uses ethnographic research to seek answers to the second question, focusing on the refugees

themselves and how they participate in shaping their own identity. Through the analysis of media photographs, three dominant scenarios are identified. The first scenario constructs refugees as bare life, which leads to the perception of refugees as helpless and incapable beings who need to be protected. They are expected to show appropriate gratitude for the protection provided. Refugees often find themselves in a situation where they internalise this scenario. At the same time, however, they reject it and transform it into a position of strength and heroism for refugees by emphasising their independence and referring to the universal concept of human rights. The author reveals how refugees have transformed this scenario through an artistic performance in the theater using specific inscriptions on their bodies, which they subsequently questioned. The second scenario depicts refugees as criminals. This scenario depicts refugees as a threat to the host country, while female refugees are perceived as victims. The third and final scenario depicts refugees as helpful workers. Here, refugees are portrayed as capable workers who contribute to the economic prosperity of the host country. The identification of these three dominant scenarios is a key contribution of the book. By describing the behaviour of refugees in these scenarios (victim, criminal, useful worker), Harbisch concludes that all three scenarios lead to the depoliticisation of refugees, indicating that refugees are either excluded from politics or politicised in a negative sense. Furthermore, the author provides insight into how refugees themselves respond to this reality, how they disrupt these scenarios, how they reject and reshape them, or even (ironically) appropriate them in order to repoliticise their role.

The book presents new data reflecting the views and needs of refugees, collected during ethnographic research. It contains several appendices that enhance the transparency of the collected data. The author presents a table with the results of a quantitative media analysis conducted in Chapter 2. It includes a table providing an overview of the interviews conducted, which lists the nationality and age of the respondents, as well as the date and location of the interviews. It is also possible to view the author's interview materials, specifically the topics and questions she addressed in each interview. In general, this book can be recommended to students and researchers in the field of international relations. It will be especially beneficial for researchers working on migration and refugees.

Harbisch, Amelie (2024): ***Making Refugees Political Agency Visible: Practices of the Subject.*** **London: Routledge.**

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