"Unlike books that reduce rightwing populism in the ~~global south~~ to a few scattered footnotes, Anthony W. Pereira's edited volume illustrates the advantages of putting Jair Bolsonaro and Latin American rightwing populism at the center of comparative analysis. *Right-wing Populism in Latin American and Beyond* appeals to readers interested in theoretical, normative, and political-economic debates. Using cases from Latin America, Asia, Europe, and U.S. the contributors to this volume offer novel conceptual insights focusing on the political economy of rightwing populism, its relationships with civil society, its impact on democracies, and on how and why populist politicized and mismanaged the COVID 19 epidemic."

Carlos de la Torre, *editor of* The Routledge Handbook of
Global Populism and Director, Center for Latin American
Studies, University of Florida

"This a timely volume on right-wing populism and its current challenge to democracy. Initial chapters discuss the thorny problem of defining populism, followed by rich empirical chapters on a wide range of cases. Though centrally focused on Latin America, the volume is impressive in its broadly comparative approach, encompassing cases in Western Europe and the Philippines, as well as special attention to India and Brazil. A final empirical section presents valuable and wide-ranging perspectives on Bolsonaro's pernicious approach to COVID politics in Brazil. A welcome contribution combining deep case knowledge with comparative insights."

Ruth Berins Collier, *Heller Professor of the Graduate School,*
Department of Political Science, University of California, Berkeley

RIGHT-WING POPULISM IN LATIN AMERICA AND BEYOND

With contributions from 22 scholars and empirical material from 29 countries within and beyond Latin America, this book identifies subtypes of populism to further understand right-wing populist movements, parties, leaders, and governments. It seeks to examine whether the term populism continues to have any validity and what relationship(s) it has to democracy.

- Part I is an exploration of populism as an analytical concept. It asks how populism can and should be defined; whether populism can be broken down into subtypes; and whether the use of the term within and beyond Latin America in recent scholarship has been consistent.
- Part II focuses on political economy, and specifically whether political economy explanations of both the causes and consequences of right-wing populism fit recent cases in Latin America, Europe, and the Philippines.
- Part III examines institutions, and in particular institutions of coercion and digital communication. It contains chapter studies on various aspects of populism in Brazil, Spain, India, and Italy.
- Part IV concerns the coronavirus pandemic and the specific case of right-wing populism in Brazil. It examines the Bolsonaro government's response to the coronavirus pandemic, and how that response exacerbated the health crisis and reduced the government's popularity.

Right-Wing Populism in Latin America and Beyond is a timely and socially relevant contribution to the understanding of contemporary challenges to democracy. It will be of interest to scholars, students, and practitioners eager to understand the rise in right-wing agendas across the globe.

Anthony W. Pereira is Director of the Kimberly Green Latin American and Caribbean Center and Professor in the Department of Politics and International Relations at Florida International University. From 2010 to 2020 he was the founding director of the Brazil Institute at King's College London. Professor Pereira's research interests include authoritarianism and democracy, human rights, public security policy, and international relations in Latin America and the Caribbean. He has a B.A. in Politics from Sussex University and an M.A. and Ph.D. in Government from Harvard University. He has held positions at the New School for Social Research, the Fletcher School of Law and Diplomacy at Tufts University, Tulane University and the University of East Anglia. Professor Pereira has also been a visiting professor in the Department of Political Science at the Federal University of Pernambuco and at the Institute of International Relations at the University of São Paulo in Brazil. He has been a Fulbright and Fulbright–Hays fellow and received grants from, amongst other funders, FAPESP (the São Paulo research council), the British Academy, the Andrew W. Mellon Foundation, the John D. and Catherine T. MacArthur Foundation, and the Organization of American States. His books include *Modern Brazil: A Very Short Introduction* (Oxford University Press, 2020); (with Jeff Garmany) *Understanding Contemporary Brazil* (Routledge, 2018); and *Political Injustice: Authoritarianism and the Rule of Law in Brazil, Chile, and Argentina* (University of Pittsburgh Press, 2005). His articles have appeared in journals such as *Comparative Political Studies*, *Latin American Research Review*, *Commonwealth and Comparative Politics*, *Rising Powers Quarterly*, the *Bulletin of Latin American Research* and the *Journal of Latin American Studies*.

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RIGHT-WING POPULISM IN LATIN AMERICA AND BEYOND

Edited by Anthony W. Pereira

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ABBREVIATIONS

AKP	Justice and Development Party (Turkey)
AMLO	Andrés Manuel López Obrador
ANEL	Independent Greeks party (Greece)
ATS	Anti–Terrorist Squad
BJP	Bharatiya Janata Party (India)
CAA	Citizenship Amendment Act
CBI	Central Bureau of Investigation
CCA	Computer–assisted content analysis
CMS	Critical Management Studies
CNN	Cable News Network (Media network)
COVID-19	Disease caused by a new coronavirus called SARS-CoV-2
CVC	Central Vigilance Commission
DC	*Democracia Cristã* (Christian Democracy Party – Brazil)
DGP	Director General of Police
DIG	Deputy Inspector-General
DMC	Delhi Minorities Commission
EU	European Union
FARC	Revolutionary Armed Forces of Colombia
FDIs	Foreign Direct Investment
FIR	First Information Reports
GDP	Gross domestic product
HCQ	Hydroxychloroquine
ISI	Inter-Services Intelligence (Pakistan)
LGBTQIA+	Abbreviation for lesbian, gay, bisexual, transgender, intersex, and asexual. Umbrella term that is often used to refer to the community as a whole. The plus sign represents people

	with diverse sexual orientations, gender identities, gender expressions, and sex characteristics who identify using other terms
LP	Liberal Party (Philippines)
MDB	*Movimento Democrático Brasileiro* (Brazilian Democratic Movement Party)
MLA	Members of the legislative assembly
NGO	Nongovernmental organization
NIA	National Investigation Agencies
NOVO	*Partido Novo* (New Party – Brazil)
NPM	New Public Management
NUTS	Nomenclature of Territorial Units for Statistics
OECD	Organization for Economic Co-operation and Development
PARA	American People's Revolutionary Alliance ~~party~~ (Peru)
PC do B	*Partido Comunista do Brasil* (Communist Party of Brazil)
PCB	*Partido Comunista Brasileiro* (Brazilian Communist Party)
PDT	*Partido Democrático Trabalhista* (Democratic Labor Party – Brazil)
PJD	Justice and Development Party (Morocco)
PL	*Partido Liberal* (Liberal Party – Brazil)
PMB	Partido da Mulher Brasileira (Brazilian Women's Party)
PMN	Partido da Mobilização Nacional (National Mobilization Party – Brazil)
PODE	Podemos (Brazil)
PP	Progressistas (~~Progressists party~~ – Brazil)
PRF	Federal Highway Police
Pronasci	Programa Nacional de Segurança Pública com Cidadania (Public Security with Citizenship Program)
PROS	Partido Republicano da Ordem Social (Republican Party of Social Order – Brazil)
PRTB	*Partido Renovador Trabalhista Brasileiro* (Brazilian Labor Renovation Party)
PSB	*Partido Socialista Brasileiro* (Brazilian Socialist Party)
PSC	*Partido Social Cristão* (Christian Social Party – Brazil)
PSD	*Partido ~~Soial~~ Democrático* (~~Soial~~ Democratic Party – Brazil)
PSDB	*~~Partido da Social Democracia~~* (~~Party of Social Democracy – Brazil~~)
PSOL	*Partido ~~Socialinos~~ e Liberdade* (Socialist and Freedom Party)
PT	*Partido dos Trabalhadores* (Workers' Party – Brazil)
PV	*Partido Verde* (Green Party – Brazil)
REDE	*Rede Sustentabilidade* (Sustainability Network ~~party~~ – Brazil)
RWP	Right-wing populists
SARS-CoV-2	New coronavirus discovered in 2019

SENASP	*Secretaria Nacional de Segurança Pública* (National Secretariat for Public Security)
SIT	Special Investigation Team
SUSP	*Sistema Único de Segurança Pública* (Unified System of Public Security)
SYRIZA	The Coalition of the Radical Left – Progressive Alliance party (Greece)
UAPA	Unlawful Activities Prevention Act
UN	United Nations
UNICEF	United Nations International Children's Emergency Fund
UPPs	*Unidades de Polícia Pacificadora* (Pacificatory Police Units)
US/USA	The United States of America
WHO	World Health Organization
WTO	World Trade Organization

1

INTRODUCTION

Anthony W. Pereira

On June 12, 2022, in Marbella, Spain, Giorgia Meloni, President of the *Fratelli d'Italia* (Brothers of Italy) party, spoke to a rally organized by the far-right Vox party. Dressed in white and standing in front of a podium labeled "Real Change" and "Vox", Ms. Meloni shouted slogans in a hoarse voice full of anger and urgency:

> Yes to the natural family. No to the LGBT lobby. Yes to sexual identity. No to gender ideology. Yes to the culture of life. No to the abyss of death. Yes to the universality of the cross. Not to Islamic violence. Yes to secure borders. No to mass immigration. Yes to work for our citizens. No to big international finance. Yes to the sovereignty of the people. No to the bureaucrats of Brussels. And yes to our civilization. And no to those who want to destroy it…Long live Spain! Long live Italy! Long live the Europe of patriots!

The speech was greeted by a standing ovation from the crowd (VOX 2022).[1]

About three months later, on September 25, 2022, the Brothers of Italy, in coalition with the Lega party led by Matteo Salvini and *Forza Italia* led by Silvio Berlusconi, took 44 percent of the vote in Italy's parliamentary election. (Giorgia Meloni subsequently became Prime Minister on October 22).[2] News of this electoral victory was greeted warmly in some parts of Latin America. In Chile, the right-wing presidential candidate Jose Antonio Kast, who had lost the runoff to Gabriel Boric in December 2021, said "Italians have spoken loudly and clearly" and hailed the "undeniable triumph" of the Italian far-right.[3] In Brazil, Eduardo Bolsonaro, son of the then-President of Brazil and a candidate for federal deputy in the 2022 elections, tweeted, "Congratulations Giorgia Meloni, who will be the first woman to govern Italy, but you will hear from the media that the fascism of the ultra-right won. As in Brazil, Italy is now 'God, fatherland, and family'".[4]

What accounts for the resonance of this electoral victory in Latin America? What are the similarities and differences between right-wing populist movements in Latin America (a region with a long history of populism) and elsewhere, including Europe? This book explores those questions, based on the assumption that examining right-wing populism in its own right could help researchers using a variety of definitions of populism to create a common framework for analysis.

Right-wing populism is a subtype of mass politics that frames politics as a moral crusade. It has an aversion to "globalism" and multilateralism and defends national sovereignty, a hardline approach to law and order, the patriarchal family, conservative social values, and religion. It is important for at least three reasons. First, it has grown tremendously in recent years, becoming "dominant in the present" (Finchelstein 2017, xi) and bringing leaders to power in Austria, Poland, Hungary, the Philippines, India, Turkey, Italy, the United States, Brazil, El Salvador, Costa Rica, and elsewhere. Second, it has innovated in terms of its use of social media, its presentational style, and its ideological content. Third, in some instances, it threatens democracy.

This focus on right-wing variants of populism is not based on a claim that left-wing populism does not exist and does not also threaten democracy under some conditions. Instead, it assumes that studying right-wing populism on its own will help our understanding in a way that lumping it together as another example of populism writ large does not. This is a challenge, because some forms of populism, such as Peronism in Argentina, combine both left- and right-wing ideological elements. In addition, populist governments generally identified as left-wing, such as those of Hugo Chávez in Venezuela (2002–2013) and Andrés Manuel Lopéz Obrador or AMLO of Mexico (2018–present) may share important elements with their right-wing counterparts.

All but one of the 15 chapters in this book were prepared for and presented in an online conference organized by the Institute of Latin American Studies at the School of Advanced Study and the Brazil Institute at King's College London, both of the University of London, on March 18–19, 2021. The conference was on populism in general, and this is reflected in the chapters, several of which, especially two in the theory part, attempt to generalize about all forms of populism. The later parts of the book narrow the focus to right-wing populism, and the last part on COVID-19 offers in-depth studies of one case, the government of Jair Bolsonaro in Brazil (2019–2022). This is done because *Bolsonarismo* has had a major impact on the largest country in Latin America. More than the left-wing variant, right-wing populism has changed in recent decades, becoming a complex and dynamic transnational movement with the potential to disrupt, transform, and challenge the cleavage patterns and institutions of many democracies.

This introductory chapter will proceed in two parts. The first will briefly review Latin America's struggle with the question of popular identity in three key periods of its history since the beginning of the 19th century. The second will lay out some of the questions raised by the chapters in this book. For the contributors'

answers to these questions, and a suggested framework for the comparative ana-
lysis of right-wing populism, readers should turn to the conclusion of this volume.

Who Are "the people"?

Frederico Finchelstein (2017, xi, 2) argues persuasively that it is necessary to view
right-wing populism historically and from a global perspective, and he begins his
history with the first populist governments in Argentina and Brazil in the mid-
20th century (Finchelstein 2017, xv). However, conservative arguments about the
people and how they should be represented have a long lineage. In particular,
19th-century conservatives in Latin America took positions that have affinities
with those of 21st-century right-wing populists. This is because many of the latter
are influenced by traditionalism, an anti-modern and anti-Enlightenment intel-
lectual movement that reveres hierarchy, rejects the idea of progress, and places
spiritual and cultural values above material ones.[5]

In the Spanish and Portuguese empires in the Americas at the beginning of
the 19th century, the question of who were "the people" was complicated, more
complicated than in Iberia itself. The conquest of the indigenous population and
the mass importation of African slaves resulted in a complex social hierarchy. In
the 1812 Cadiz constitution, the indigenous were formally citizens but usually did
not enjoy that status in practice. Citizenship was not automatically granted to ex-
slaves, who had to solicit the right to naturalization. Women were not full citizens,
and creoles, white male descendants of Spaniards born in the Americas, formed
the bulk of the political elite. Benedict Anderson calls these leaders the creole
pioneers, a vanguard advancing the idea of a nation-state, carving those nations
out of the provincial boundaries of the Spanish American empire during and after
the wars of independence (Anderson 1991, chapter 4).

Two ideas were fundamental in these conflicts. The first was that sovereignty
did not emanate from the body of the absolutist king or queen, the holder of a
divine right to rule. Sovereignty belonged to the people. Article 3 of the Spanish
Constitution of 1812 declared that sovereignty "resides essentially in the nation
and, for this reason, the right to establish its fundamental laws belongs exclusively to
it" (Palti 2020).[6] In the words of Palti (2017, 93), some creole elites in the Spanish
Empire denounced "the corruption and ambition of colonial administrators" in
the name of "the people". Palti (2017, 308) cites Edmund Morgan's description
of this move: "representatives invented the sovereignty of the people in order to
claim it for themselves".

The second idea was that the people were not singular but plural. Rather than
replace a monarch with a despot who claimed to be the voice of the people, liberal
constitutionalists wanted the people to be represented by a constituent assembly
that would draw up a written constitution, a social contract between the ruled and
their rulers. The power of the state would be constitutionally self-limiting.

Liberal constitutionalism created a schism between liberals and conservatives that endured after the independence of Latin American states. Conservatives remained closer to the views of supporters of absolutist monarchs than liberals. They revered traditional social hierarchies and "order", which they often took to be God-given. They were sometimes skeptical of science and mistrustful of criticisms of authority. And they typically thought of the people as a collective, rather than as multiple individuals, as in liberalism.

Many conservatives supported slavery, the exclusion of Afro-Latin Americans from citizenship, and the acceptance of the indigenous only on the condition of their assimilation to the norms and practices of the white population. Conservative nationalism in Latin America was also often inward- rather than outward-looking. Whereas in other nationalisms the alien other was outside the national territory – for the Chinese it was "barbarian" outsiders who did not recognize the supremacy of the Middle Kingdom, and for the British, it was continental Europe, especially France – in Latin America the alien was often inside the national territory.[7] In Domingo Sarmiento's 1845 work Facundo, the central conflict is "between civilization and barbarism" in Argentina (Echeverria 2004, 2). In Euclides da Cunha's *Os Sertões* (2019), the enemy of the Brazilian Army in 1896–1897 is not a foreign invader but local people of the interior – *sertanejos* – following a messianic leader.

Conservatives generally preferred a strong, centralized state, a limited franchise, a powerful landed elite, and mercantilist controls on trade. If sovereignty was ultimately based on the people, it was exercised and embodied by a strong leader, a substitute for the pre-modern absolute monarch. Conservatives tended not to accept the liberal conception that political power was the result of a social contract, a voluntary pact between the citizens and the rulers. For them this was a violation of the natural order given by God.

The conservative view of power was more monolithic than that of the liberals: a leader incorporated a unitary people in a strong state with an official religion. The leader had a responsibility to protect the people and property, but not to recognize individual natural rights, which opened the door to what conservatives feared was anarchy. These elements of 19th-century conservatism give it an affinity with early 21st-century right-wing populism. If the latter is new in some respects, for example in its use of social media, much of its ideological foundation is not.

If the predecessors of right-wing populists in the 19th century were struggling with a response to the French revolution, "classic" populists of the mid-20th century were responding, at least in part, to the Bolshevik revolution in Russia in 1917. The governments of President Juan Domingo Perón (1946–1955; 1973–1974) in Argentina, President Getúlio Vargas (1951–1954) in Brazil, and President José María Velasco Ibarra (1944–1947; 1952–1956) in Ecuador were attempts to present an alternative model to Soviet communism as well as liberalism, socialism, and fascism (Finchelstein 2017, xv).

These governments combined elements of both left- and right-wing ideology. Contemporary right-wing populism borrows elements from its classic predecessors, most notably the condemnation of "the elites" as enemies of the people and its reverence for a strong leader who embodies and speaks for the nation. Finchelstein (2017, xv) describes these mid-20th century governments as "anti-liberal (against existing models of constitutional democracy)" but not "dictatorial and racist".

In Finchelstein's (2017, xxvi–xxvii) words,

> As authoritarian as the early populists were – in the sense that if you were not with them you were considered an enemy of the people (of the antipeople, not the people) – their definition of the people was rooted in the notion of the *demos*. If you wanted to support the regime, you could quickly switch from the antipeople to the people…[The antipeople] under populism are enemies of the people who lack legitimacy, but they are still allowed to exist and lose elections. They are not entirely persecuted or banned, even though they are merely tolerated.

These governments were also inclusionary in that they incorporated trade unions and were based on an expanded franchise after periods in which unions had been marginalized and repressed and voting had been tightly limited and controlled (Collier and Collier 1991, 22). Unlike classic populism, contemporary right-wing populism is often exclusionary and overtly authoritarian, and rather than tolerate political rivals, it sometimes views rivals as enemies who must be driven out of the country or at least intimidated into silence.[8]

The current wave of right-wing populism in Latin America can be traced back to the 1990s, represented by presidents such as Carlos Menem (1989–1999) in Argentina, Alberto Fujimori (1990–2000) in Peru, Fernando Collor de Melo (1990–1992) in Brazil, and Abdala Bucaram (1996–1997) in Ecuador. However, it has changed considerably since then and includes the governments of Álvaro Uribe (2002–2010) in Colombia, Nayib Bukele (2019–present) in El Salvador, Jair Bolsonaro (2019–present) in Brazil, and Rodrigo Chaves (2022–present) in Costa Rica, as well as the presidential candidacies of José Antonio Kast in Chile in 2021 and Rodolfo Hernandez in Colombia in 2022. If 19th-century conservatism was a reaction to the French revolution and mid-20th-century populism a response to the Bolshevik revolution, this wave of late-20th-century and early-21st-century right-wing populism is at least partly a reaction to post-Cold War globalization that reached its peak in the 1990s and 2000s.[9]

Globalization eroded traditional national sovereignty in areas such as trade and investment, pushing it upward to supranational bodies such as the European Union and the World Trade Organization and downward toward regional and local governments, as well as multinational corporations and nongovernmental organizations (NGOs). It was also accompanied by the rise of transnational metropolitan elites, highly educated managers, and professionals exemplified by the

attendees of the annual World Economic Forum in Davos, Switzerland who were often seen as secular, technocratic, neoliberal, and elitist.

In its current form, right–wing populism – like its left–wing counterparts – offers to "take back control" from the forces of transnational technocratic elitism (Lind 2020, xxiii). Instead of multiculturalism, pluralism, and tolerance, it offers religious (and often ethnic) nationalism. In place of multilateral and supranational governance, it suggests traditional national sovereignty. Rather than the separation of powers, constraints on executive power from legislative, judicial, auditing, and investigative bodies, and the protection of minority rights of liberal democracy, it shows a preference for a strong leader who embodies the will of the people and engages in a plebiscitary form of governance.[10] In the face of increasingly assertive social movements demanding rights for the indigenous, immigrants, women, and sexual, gender, regional and religious minorities, right–wing populism offers the God of state-sanctioned religion, the patriarchal family, and the rites and symbols of the mainstream identity of the national majority. Unlike traditional conservatism, it does not want to maintain the stability of the status quo, but to radically deconstruct fundamental aspects of the current social order.

In economic policy, US and European versions of right–wing populism appear to differ from their Latin American counterparts. In the first two regions, and especially after the financial crisis of 2008–2009, right–wing populists usually offer economic protectionism and nationalism as an alternative to neo-liberalism capitalism, as well as social safety nets for "the people" – the deserving "real" people of the nation. In Latin America, in contrast, right–wing populists are more likely to offer a hard version of neoliberalism, at least rhetorically. But both variants attempt to offer the prospect of popular sovereignty and a new order that is fairer to those made vulnerable or uncomfortable by cultural and socioeconomic change.

Similarly, Latin American right–wing populists are less likely than their European counterparts to engage in nativist attacks on immigrants, although the appearance of such narratives in the 2021 Chilean presidential election suggests that this difference is not absolute. A third contrast between Europe and Latin America lies in the nature of party cleavage. Piketty argues that in Europe (and the United States), the parties of the left have "Brahminized", shifting from being based on working–class voters to representing the highly educated (Piketty 2019, 869). This realignment has generally not occurred in Latin America. For example, the largest party of the left in the region, the Workers' Party (*Partido dos Trabalhadores*, or PT) in Brazil, draws its support largely from the lower half of the income distribution in the country. In presidential elections, including in 2018, the less educated and lower income the voter, the more likely she is to vote for the PT. On the other hand, the right–wing populist candidate Jair Bolsonaro did particularly well in the same election among high-income and well-educated voters (Moura and Corbellini 2019; Nicolau 2020). This is not a pattern found in the party systems of Europe and the United States.[11]

Questions Raised by the Contributors to This Volume

The chapters that follow are organized into four parts: theory, political economy, institutions, and the COVID-19 pandemic. In the first part, three chapters using different definitions of populism examine what relationship populism might have with democracy, and how the category of right-wing populism can be used productively in comparative political analysis. Questions raised in this part include to what extent is populism congruent with authoritarianism? What are the main processes and drivers associated with populism? And how does populism affect governance?

In Chapter 2, Stacey Hunt uses an organizational definition of populism, considering it a way of competing for and exercising political power. She laments the lack of agreement in the literature on some of the most basic characteristics of populism and asks whether scholars have been consistent in their categorization of cases. In particular, she questions the stereotype that European populism tends to be exclusionary and right-wing while Latin American populism tends to be inclusionary and left-wing and asks why there has been a relative neglect of right-wing populism in Latin America. She cites the presidencies of Alberto Fujimori in Peru (1990–2000) and Álvaro Uribe in Colombia (2002–2010) as examples of the latter.

In her detailed analysis of elite-mass relationships during the administrations of these two presidents, she lists some of these governments' similar traits and asks whether insecurity might be a key axis of polarization within societies governed by a right-wing populist movement. Hunt also explores to what extent race and gender, policy success, and elite support should be variables in a framework of analysis of right-wing populism.

Anthony Spanakos uses an ideological definition of populism in Chapter 3. He defines it as an ideology that assumes that there is a misalignment between the structure of governance and the legitimate demands of the people and that this misalignment can be fixed through electoral politics. For Spanakos, the core value of populist ideology is the defense of popular sovereignty, direct democracy, and decisive executive action in opposition to technocratic forms of rule based on indirect representation, expertise, and support for minority rights.

Spanakos argues that while populism is rhetorically anti-status quo, specific types of populism approach existing institutions of governance differently, and that these differences are the key to understanding populism in all its variety. In his chapter, Spanakos asks how we might be able to construct a typology of populism based on populist movements' approaches to institutional reform. The chapter is suggestive and replete with numerous examples from within and beyond Latin America.

In Chapter 4, Katerina Hatzikidi, like Anthony Spanakos, questions a one-dimensional reading of populism and asks whether certain misconceptions about the phenomenon might hinder our ability to understand it. For Hatzikidi, populism is a distinctive kind of discourse and performance in politics; she thus

combines a Laclauian and sociocultural perspective in her analysis. Hatzikidi is particularly interested in what populism does or does not do to democracy and is also concerned with how populism combines with other dimensions of politics to produce a distinctive set of elite–mass relations, political narratives, and styles of governance.

Hatzikidi's chapter poses three fundamental questions about populism. These are to what extent it is an enemy of liberal democracy, whether it is inevitably transient in its impact on politics, and whether it automatically de-radicalizes when it comes to power, as a consequence of its leaders becoming incumbents. In a nuanced and persuasive fashion Hatzikidi explores possible answers to these questions, attempting to show that populism is plural, gradational, and ambiguous.

The second part of the book looks at right–wing populism and political economy. The three chapters in this part have an abundance of empirical material and straddle Europe, Latin America, and the Philippines. They build on a tradition of linking populism to economic changes that goes back at least until the 1950s. In Chapter 5, Paula Rettl asks about the relationship between globalization and populism. In particular, she explores whether economic losses created by trade and financial globalization increase support for far-right populist parties. Rettl is especially interested in whether other variables mediate the relationship between economic changes and support for right–wing populism and ~~construct~~ a model that measures the relationship between trade globalization and the level of populism in the discourse of prime ministers and presidents in Europe and Latin America.

Diogo Ferrari complements Rettl's chapter by analyzing the relationship between psychological factors (such as dissatisfaction, resentment, threat perception, and hostility toward immigrants) and support for right–wing populist parties in 23 European countries. In Chapter 6, Ferrari uses European Social Survey (ESS) data from 2002 to 2018 to attempt to bridge the gap between macroeconomic studies and micro-level psychological studies to deepen our understanding of why support for right–wing populism increases under some circumstances but not others. Like Rettl, Ferrari is interested in how right–wing populism often combines with "host ideologies" such as nationalism and social conservatism.

Unlike Rettl and Ferrari's focus on quantitative relationships between several variables in a large number of cases, Cecilia Lero's approach in Chapter 7 is an in-depth look at the Philippines and Brazil under two right–wing populist presidents, Rodrigo Duterte and Jair Bolsonaro, respectively. Lero is interested in whether explanations for the rise of right–wing populism developed to explain cases in the Global North explain the same phenomenon in the Global South. She looks in particular at the economic argument that right–wing populists appeal to the losers of globalization and the cultural argument that right–wing populism is a backlash against liberal multiculturalism.

The third part of the book concerns right–wing populism and institutions. The institutions examined are the social media platform Twitter, which facilitates the

formation of networks of far-right activists, the bureaucracies of the state during right-wing populist governments, and the police under the governments of Prime Minister Narendra Modi of India and Jair Bolsonaro of Brazil. While the grouping of these chapters involves a broad understanding of the meaning of "institution", all four chapters are invitations to further comparative work in this area.

In Chapter 8, Anna de Mello and Felipe Estre ask to what extent anti-globalist discourse is homogenous on social media. Taking a sample of 1,294 tweets that were retweeted 100 times or more in a six-month period in 2020, they compare and contrast the discourse of far-right anti-globalists in Brazil, Spain, and Italy. Looking at the language of these messages, they compare and contrast their core concepts. By analyzing the degree to which these Twitter users' perspectives on foreign policy and the international order converge, they cast light on whether we should see right-wing populism as a transnational phenomenon.

The chapter by Amon Barros, Ana Diniz, and Gabriela Lotta, Chapter 9, is a theoretical exploration of the significance of bureaucratic memory. The authors ask whether the memory of bureaucrats, and in particular bureaucrats whose routines are being upended by right-wing populist elected officials, can safeguard democratic institutions. Their analysis shows how bureaucratic memory is seen within different theoretical perspectives, comparing and contrasting Weberian, new public management, and critical management studies approaches to the state. Barros, Diniz, and Lotta argue that right-wing populists sometimes use "scorched earth" tactics against bureaucrats, attacking them in order to substitute their technical approach to advising governments with political loyalists.[12] In the face of such an onslaught what, if anything, can bureaucrats do, and how do scholarly approaches to bureaucracy view the possibility of bureaucratic resistance to right-wing populist governance?

Chapters 10 and 11, by Christophe Jaffrelot and Renato ~~Sergio~~ de Lima, respectively, offer striking parallels between the behavior of two right-wing populist leaders in power. These are Narendra Modi, Chief Minister of Gujarat (2001–2014) and Prime Minister of India (2014–present), and Jair Bolsonaro, federal deputy for Rio de Janeiro (1991–2018) and President of Brazil (2019–2022). Both Modi and Bolsonaro used the police to divide society into a threatening "other" and a good, law-abiding, and victimized majority. The contours of this polarization differ somewhat by country. In India the majority is Hindu and the threatening others are Muslims, while in Brazil the majority is Christian and the perceived threats come from criminals, arising usually from the ranks of the poor, non-white, and marginalized parts of the national community.

Both Jaffrelot and De Lima ask how this polarization works, and what impacts it has on policing, public security, and the perception of violence in India and Brazil. They also ask how victimization plays a role in creating affinities between leaders and followers in right-wing populism. Finally, they also ask how Modi and Bolsonaro have used the police to create for themselves the aura of a strong and implacable leader, defending the righteous majority through the use of violence.

The final part of the book covers right-wing populism and the COVID-19 pandemic. All four chapters in this part concern the performance of the Bolsonaro government during the pandemic in Brazil, but they approach that performance from different angles. The cumulative evidence of these chapters provides a rich and disturbing portrait of the Bolsonaro administration, which presided over the second-highest national death toll during the pandemic, behind only the United States.

In Chapter 12, David Magalhães and Guilherme Casarões ask why Bolsonaro, and other leaders including Donald Trump (2017–2021) of the United States, promoted hydroxychloroquine as a "cure" for COVID-19, contradicting their own government's health authorities. They also explore the impacts of this "medical populism", examining the alt-science network that pushed for hydroxychloroquine against the advice of the public health establishment.

Leonardo Avritzer and Lucio Rennó examine right-wing populism in Brazil at both the elite and mass levels in Chapter 13. They ask how traditional gatekeepers were weakened in the 2013–2018 period, facilitating the election of Jair Bolsonaro in 2018. Calling *Bolsonarismo* an anti-political movement, they examine how Bolsonaro brought the mentality of a social movement into government, operating simultaneously as both an incumbent president and a critic and opponent of major institutions of the political system, including the Supreme Court. The chapter also analyzes why Bolsonaro's response to COVID-19 did not change, despite strong evidence that it led to growing disapproval of his government.

In Chapter 14, Vinícius de Souza Struari and Rodrigo Otávio Moretti-Pires analyze what was the role of fake news in *Bolsonarismo*. Drawing on Judith Butler's work on who is considered human and deserving of mourning, they examine the role of "denialism" in the building of a bond between Bolsonaro and his supporters. They ask which were the key elements of this denialism and why it persisted throughout the Bolsonaro government, despite abundant evidence that as a response to COVID-19, it was ineffective.

Chapter 15, by Theo Aiolfi and Giulia Champion, asks what was Bolsonaro's approach to gender identity, and how did it play a part in his reaction to the COVID-19 pandemic? Using a performative approach to populism, Aiolfi and Champion argue that right-wing populist leaders create "the people" through transgressive performances and narratives, and that the leader must be both ordinary – like the people – and also extraordinary – exceptional enough to deserve to be a leader. In the Brazilian case, they are interested in how Bolsonaro adapted his nationalist ideology to the crisis of the coronavirus scourge, which began in Brazil in early 2020. They are particularly interested in how he invoked gender stereotypes to enjoin citizens to face the virus "like a man", and they ask where this particular narrative came from, and how it appealed to the *Bolsonarista* base.

The chapters that follow are empirically rich, theoretically nuanced, and regionally diverse, with a primary focus on Latin America but with comparative

references to Europe, the United States, the Philippines, and India, among other cases. They look at right-wing populism from a variety of perspectives and using several different definitions of populism. The concluding chapter will summarize their findings and describe how they might contribute to a framework for the analysis of right-wing populism as a type of movement and elite–mass relations. Right-wing populism is unlikely to disappear from the political landscape in the near future, and its potential for disruptive change should not be underestimated.

Notes

1

> Sí a la familia natural. No a los lobbies LGBT. Sí a la identidad sexual. No a la ideología de género. Sí a la cultura de vida. No al abismo de la muerte. Sí a la universalidad de la cruz. No a la violencia Islamista. Sí a las fronteras seguras. No a la immigración massiva. Sí al trabalho dos nuestros cidadanos. No a las grandes financias internacionales. Sí a la soberania del pueblo. No a las burócratas de Bruselas. Y si a nuestra civilización. Y no a quienes quieren destruirlo…Viva España! Viva Italia! Viva Europa de los patriotas!

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2 Meloni was sworn in as Prime Minister of Italy on October 22, 2022 (see Giuffrida 2022).
3 Kast is quoted as saying "*los italianos han hablado fuerte y claro*" and as praising the "'*inapelable triunfo' de la ultraderechista italiana*" (Público 2022).
4 *"Parabéns @GiorgiaMeloni Giorgia Meloni, que será a primeira mulher a governar a Itália, mas você vai ouvir da mídia que o 'fascismo da ultradireita' venceu. Assim como o Brasil, a Italia [sic] agora é 'Deus, pátria [sic] e família'"* (ANSA 2022).
5 Despite its name, traditionalism in the 21st century is radical rather than conservative, because it sees a need to destroy many elements of the current social order and replace them with fundamentally different ones. I am influenced here by Teitelbaum (2020, 8–14). In his book, Teitelbaum gives as examples of contemporary traditionalist thinkers Aleksandr Dugin of Russia, Stephen Bannon of the United States, and Ernesto Araujo of Brazil.
6 "A soberania…reside essencialmente na nação e, por isso mesmo, pertence a esta exclusivamente o direito de estabelecer suas leis fundamentais" (Palti 2020).
7 Nationalism is here defined as an ideology that claims that there exists a unique nation deserving of recognition and autonomy (Breuilly 2013, 1–2).
8 This can be true of left-wing populism as well, as in the cases of *Chavismo* in Venezuela and AMLO in Mexico, and the exclusion can extend to working-class organizations such as trade unions if they are aligned against the populist leader.
9 This is true of contemporary left-wing populism as well. I am not offering a mono-causal explanation of right-wing populism in this section, but simply trying to context-ualize its emergence.
10 This is true of left-wing populism as well, as in, for example, Chavismo.
11 Piketty (2020, 953–958) is well aware of this difference and discusses it at some length.
12 This applies to left-wing populists as well.

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PART I

Theory

2

INTELLECTUAL IMPERIALISM AND SELECTION BIAS IN THE STUDY OF POPULISM

Stacey Hunt

Introduction

Populism is not a new phenomenon, but its recent surge in Western Europe and the United States provoked a deep fascination with the topic and engendered a flurry of studies seeking to explain its emergence, politics, and legacy. Despite this newfound attention, there remains little agreement regarding the most fundamental characteristics of populism, and scholars still struggle to put forth a basic definition of the phenomenon. This is particularly puzzling, given the decades of research on populism in Latin America, where populism has long been recognized as the most common form of rule (de la Torre 2017). Recent studies of populism from Western academics have flatly ignored the large body of accumulated knowledge on the topic derived from Latin America and insistently reduced Latin American populism to "left-wing" populism exemplified by Hugo Chávez. I call this process *intellectual imperialism*: overlooking or appropriating the vast body of knowledge on populism produced in Latin America while selectively choosing cases and interpreting data in order to arrive at preconceived conclusions that parrot US foreign policy priorities. Intellectual imperialism has led to pervasive case selection bias, inconsistent variable operationalization, erroneous data analysis, and the atheoretical application of fundamental political concepts such as democracy thereby impeding the construction of a generalizable theory of populism and hobbling the formation of robust explanations for the wave of right-wing populism currently circling the world.

This chapter seeks to demystify the rise of so-called "right-wing" populists who embrace tough-on-crime policies, deploy violence and corruption as political tools, and pursue deeply conservative, ~~redressive~~ economic policies, all with broad support from local elites. The first section identifies how *intellectual*

imperialism functions to sustain five Western myths about populism: paternalism and fungibility; the primacy of economic variables and, relatedly, the pathology of poor people's political mobilization; eclectic or vacuous policy formation; and the absence or benevolence of violence in right-wing populist regimes. The second section addresses this case selection bias by comparing Peruvian President Alberto Fujimori, Latin America's prototypical "neoliberal" populist, and Colombian President Álvaro Uribe whose populism Western scholars routinely dismiss out of hand. This comparison suggests that if Fujimori was a populist, then so too was Uribe. The third section uses the comparative case study to challenge the myths of populism in the existing literature and introduce four new variables that should be ~~foreground~~ in the study of populism: gender and deification, policy success, elite support, and violence and insecurity. Analyzing heretofore overlooked cases such as that of former Colombian President Álvaro Uribe helps to transcend false dichotomies between European populism and Latin American populism, identify new relevant variables, and establish a common research agenda for right-wing populist executives around the world.

Intellectual Imperialism

In his 1995 analysis of then–Peruvian President Alberto Fujimori, Kenneth Roberts proposed a five-point definition of populism as (1) a personalistic and paternalistic, though not necessarily charismatic, leader who is (2) extremely popular and capable of sustaining a broad, heterogeneous multiclass political coalition concentrated in subaltern sectors of society. According to Roberts (1995), populists (3) deploy a top-down process of political mobilization that bypasses institutionalized forms of mediation, concentrating power in the executive, and (4) espouse amorphous and eclectic ideologies loosely framed around antiestablishment, anti-elite rhetoric. Finally, populists buttress their support through widespread corruption and clientelism. Writing as a corrective to the pervasive use of populism to denote profligate, unwise social spending, Roberts emphasized that populism is a specific way of competing for and exercising political power untethered to any particular market model, a point on which there was general consensus. "Populism is, quite simply, a way of constructing the political" (Laclau 2005, xi), a question of "domination, not distribution" (Weyland 2001, 11).[1]

Although Roberts provided a clear template for a universal definition of populist rule with broad agreement that populism is a political rather than economic phenomenon, contemporary Western scholarship has engaged in what I call *intellectual imperialism*, overlooking or appropriating vast bodies of knowledge and insistently continuing to operationalize populism in economic terms while selectively choosing cases and interpreting data in order to arrive at preconceived conclusions that parrot US foreign policy priorities. *Intellectual imperialism* sustains five atheoretical and antiempirical tropes among Western scholars of populism: paternalism, fungibility, the pathology of the poor, the primacy of

economic variables, and the compatibility of right–wing violence with democ-
racy. Cherry-picking cases, this scholarship reduces Latin American politics to an
indistinguishable "wave of Latin American left populisms of the early twenty-first
century" which were "sustained by a global commodity boom" (Brubaker 2017,
358). Western scholars are particularly mesmerized by Hugo "Chávez and friends,"
turning the now deceased leader into a synecdoche for all Latin American (left-
wing) populists, who all "take inspiration from Chávez" (Weyland 2013, 19).
According to this line of reasoning, Chávez and Evo Morales are the "prototypical"
Latin American populists whose profligate redistribution defines Latin American
"inclusionary" populism as opposed to "exclusionary" populism everywhere else
in the world (Mudde and Rovira 2013). Even Nicolás Maduro, Chávez's decidedly
unpopular and flatly autocratic successor, is guilty by association, repeatedly labeled
a populist by authors before they ever asked the question or provided any data to
substantiate the claim (Moffitt 2016, 1). A search on Google Scholar for "Hugo
Chávez populist" yields 13,900 results. A similar search for "Álvaro Uribe popu-
list" reveals just 2,360 results, suggesting that Western scholars are not studying the
universe of cases. According to Campani and Lazaridis (2017, 3), the term "popu-
lism" has become a slur "for all those who do not accept the current neoliberal
political–economic world order," including within academe. This insistence on
reducing Latin American populism to Hugo Chávez has engendered extreme case
selection bias which obscures any connection between "right–wing" and "left–
wing" populism, makes the recent rise of "right–wing" populism outside of Latin
America seem inexplicable and without precedent, and handicaps our efforts to
understand populism as a global phenomenon.

Western scholars insistently cling to disproven definitions of populism as prof-
ligate redistribution to the poor to conclude that former Colombian President
Álvaro Uribe and other right-wing populists in Latin America were not populists
at all (e.g., Bejarano 2013; Dugas 2003). Bejarano (2013, 332–333), in particular,
does circles around herself, presenting impeccable empirical evidence demon-
strating Uribe's "active use of a populist style and a populist discourse" only to
conclude that Uribe wasn't *really* a populist because he didn't emphasize "class
divisions as central social cleavages," didn't entertain ideas of redistributive justice,
and never invoked the "oligarchy." In his numerous writings condemning the
populist excesses of Hugo Chávez, Kirk Hawkins (2010, 42) discards the possi-
bility that Álvaro Uribe was a populist, declaring without evidence or explanation
that Uribe was a "pluralist charismatic," "a president who acquired a reputation
as a tireless public servant in the country's war against leftist guerrillas." Levitsky
and Loxton (2013) similarly label Uribe as a "non–populist government" without
ever considering the question at hand, collecting or presenting substantiating evi-
dence, or citing local experts. More alarming, they claim that although Uribe
was "responsible for human rights violations," these abuses were "episodic" rather
than "frequent" and didn't "skew the playing field against the political opposition"
(Levitsky and Loxton 2013, 113).

Others accept that Uribe was a populist, but toe the line with US geo-political alliances by rationalizing Uribe's "good" populism in contrast with Chávez's "bad" populism. Kurt Weyland (2013, 25) assents to the fact that Uribe "employed populist strategies," but asserts that Uribe and other right-wing populists in Latin America were *good* for democracy because they acted "on behalf of neoliberal economic policies" and "the need to defeat violent leftist guerrillas." "[R]ight-wing populism did not ruin democracy in Argentina, Brazil, or Colombia, and in Peru democracy's destruction and temporary replacement were followed by a quick resurrection. By contrast, left-wing popu-lism has a more negative balance sheet," Weyland insists (2013, 26). According to Weyland (2013, 26–27), left-wing populists – namely, Hugo Chávez – are "non-democratic leaders" who constrain political pluralism, while right-wing populists engender democracy "by reducing the power of the state over markets and private economic actors," subordinating politics to economics. Left-wing populists, he continues, "put democracy to death" through their incorpor-ation of the poor and previously marginalized into the political process and the distribution of national resources (Weyland 2013, 29). Right-wing populists such as Alberto Fujimori and Álvaro Uribe, who fundamentally altered or suspended constitutional rule of law, shuttered or corrupted Congress and the courts, destroyed all checks on executive power, oversaw the illicit redistribu-tion of resources to the wealthy, and deployed paramilitary death squads and secret police forces to put actual people to death, often grotesquely tortured and dismembered, "had no such effect" (Weyland 2013, 29). Weyland (2013, 31) claims that in the aftermath of transient neoliberal populist experiments, Colombia, Mexico, Peru, and Brazil "boast stable democracies" today, marked by "[s]teady institutions, pluralist party systems, and respectable government performance," which have allowed those countries to avoid a repeat of those populist experiments. He juxtaposes this with the "inflation, corruption, and violent crime" of left-wing populism (ibid.).

Such analyses are disturbingly out of touch with the devastating collapse of constitutional democracy in Peru and Brazil; enduring mass protests decrying state violence and inequality in Colombia and Peru; and profound problems with organized crime, vast corruption, and police violence across the region. Weyland and friends also display flagrant disregard for the dozens of scholars who have meticulously detailed and theorized various facets of Uribe's populism in Spanish-language works published in Latin America, including his reliance on violence, corruption, and fear. Pastrana and Vera (2011) detail Uribe's populist for-eign policy; Galindo (2006) establishes the centrality of authoritarian, *mano dura* anti-insurgent policies to Uribe's populism; Mara Viveros Vigoya (2013) explores the raced-gendered components of Uribe's populist appeal; a superlative volume edited by Mauricio Garcia Villegas and Javier Eduardo Revelo Rebolledo (2009) explores the vertical and horizontal consolidation of power in the executive under Uribe. María Jimena Duzán (2004), a Colombian journalist, explicitly drew a

comparison between Fujimori and Uribe as far back as 2004. Adolfo Atehortúa Cruz (2007) meticulously details the role of Uribe's community councils in fostering direct contact with his constituents and distributing patronage. Miguel Ángel Herrera (2012) and Cristina de la Torre (2005) both explore questions of democracy, authoritarianism, and the rule of law under Uribe's populist regime, the former theoretically and the latter empirically. *Las perlas uribistas* (2010) details Uribe's vast corruption, ties to paramilitary violence, and consolidation of power in the executive branch through a violent frontal attack on the judiciary, civil society organizations, and the free press, as well as the suffocating fear felt by his victims. Álvaro López (2016) identifies the crisis engendered by the confluence of the adoption of neoliberal economic policies, the deinstitutionalization of the Colombian state, and the failure of peace talks with the Revolutionary Armed Forces of Colombia – FARC as creating the necessary political opportunity for Uribe's populist project to emerge and succeed. Marta Fierro (2014) persuasively argues for understanding Uribe as a populist based on his personal charisma and authority, manifested in his extraordinary communicative abilities; the use of a simple, nationalistic, and moralistic political discourse based on good people (*el pueblo*), and bad people (terrorists), a polarization of society, and the corresponding framing of Uribe as the embodiment of the good people in their moral fight against the terrorist enemy; the refusal to negotiate with or recognize the right to exist of the enemy; direct relations with constituent particularly through community counsels/town hall meetings; and the concentration of power in the executive. Comparing the populist rule of Hugo Chávez and Álvaro Uribe, José Miguel Cubillos (2011) finds that both deployed corruption to buttress their support and remain in power.

Western scholars have tended to overlook this vast body of research exploring right-wing populism in Latin America in favor of deploying "populism" as a political cudgel to bemoan the redistribution of political and economic power by Latin American presidents critical of the United States (Arditi 2005). Right-wing populism in the Americas, to the extent it is admitted at all, is blindly welcomed as necessary, transient, and democratic, explicitly embracing right-wing violence as more compatible with democracy than economic redistribution. This selection and confirmation bias has impeded a robust understanding of right-wing populism and created false binaries between supposedly right-wing European populism and left-wing Latin American populism. In his hallmark treatise on populism, Ernesto Laclau argued that "what is specific about populism – its defining dimension – has been *systematically* avoided. We should start asking ourselves whether the reason for this systematicity does not perhaps lie in some unformulated political prejudices guiding the mind of political analysts" (Laclau 2005, 10). In order to get at that "defining dimension," the next section seeks to address this systemic case selection bias through a studied comparison of prototypical populist Alberto Fujimori and former Colombian President Álvaro Uribe.

Alberto Fujimori and Álvaro Uribe

Personal and Paternal

Both Colombia and Peru were widely considered failed states when Alberto Fujimori and Álvaro Uribe launched their first campaigns for office in 1989 and 2001, respectively. Mired in economic crisis, collapsing or inexistent infrastructure, and civil wars with communist insurgents and violent drug cartels, both states were on the verge of collapse, lacking basic administrative and coercive powers (Hunt 2006; Mauceri 1995). Unable or unwilling to resolve this dramatic crisis, existing political parties and elites, as well as the judiciary, were all deeply unpopular and discredited (Roberts 1995). As traditional political actors became more and more unpopular, the party systems in each country first fragmented, and then collapsed as the foremost institution to mediate between state and society (Burt 2006; Fierro 2014).

Despite long careers in public service, neither Fujimori nor Uribe had widespread public recognition before launching their first presidential campaigns (Bowen 2000; Holguin and Escamilla 2009). Eschewing despised establishment parties, both leaders ran as outsiders, cobbling together their own electoral movements by traveling tirelessly around the country to promote "direct democracy" by holding "democratic workshops," meeting with constituents, and dominating local news coverage (Holguin and Escamilla 2009; Schmidt 2000). Refusing to debate other candidates, both candidates simply embraced well-known racial stereotypes – Fujimori of Japanese immigrant and Uribe of Antioqueños – to project themselves as hardworking and thereby juxtapose themselves with lazy, corrupt elites (Rousseau 2010; Viveros 2013). They each chose vague slogans – "honesty, technology, and work" and "firm hand, big heart" – eschewed indulgences such as alcohol and tobacco consumption, highlighted their simple, abstemious diets, and frequently donned traditional ponchos and hats in the style of rural peasants all in an effort to highlight their "immense capacity for work" which served as a heuristic to contrast them with traditional political and economic elite (Bowen 2000; Roberts 1995). Finally, each man portrayed himself as a national patriarch imbued with messianic qualities, preordained to save his country from chaos and utterly irreplaceable (Bejarano 2013; Burt 2006; Kimura 1998; Bejarano Guzmán et al. 2010).

Popular Coalition Builders

Fujimori and Uribe both won in upset victories against establishment candidates and went on to win consecutive elections by commanding margins, maintaining extraordinary levels of public support during their 10 and 8 years in office, respectively, despite recurrent scandals that earned each of them the moniker of "Teflon"[2] president. Their approval ratings – routinely around 70% – stood in stark contrast to that of other democratic institutions which barely made it out of the single

digits in either country. In March 1992, with only 12% of Peruvians expressing confidence in political parties, the "delegitimization of established institutions was so thorough that Fujimori received poplar acclaim when he suspended the constitution, dissolved Congress and regional governments, and purged most of the judiciary in a military-backed *autogolpe*," his approval ratings jumping over-night from 59% to 82% (Roberts 1995, 98). Fujimori won his third bid for office in 2000 with 74.3% of valid votes, earning a clear mandate just months before his regime's spectacular collapse. Even during his 2008 trial for crimes against humanity, two-thirds of Peruvians approved of Fujimori's tenure (Associated Press 2009). Similarly, Uribe left office after eight years with a 68% approval rating and three years later was voted "The Greatest Colombian" on Colombia's History Channel (Fierro 2014, 129; Viveros 2013).

Running few or no other candidates on their respective lists, Fujimori and Uribe both initially faced opposition-dominated legislatures that they quickly moved to co-opt by adopting policy proposals from other parties, appointing opposition leaders to positions within their administration, and calling for an elimination of despised legislator's seats and benefits. Each leader skillfully constructed broad coalitions that revolved around their persona, such that "Fujimorista" and "Uribista" became labels that identified political ideology, policy persuasion, coalition member-ship, and voter preference. Upon his election, Fujimori quickly added the military, media, and business community to his campaign coalition of Japanese-Peruvians, Evangelicals, rural indigenous, university students, and the national intelligence community (Bowen 2000; Roberts 1995; Schmidt 2000). "The rapidity with which these interests coalesced around Fujimori and the lack of an alternative political project reflected the collapse of the party system that had allowed Fujimori to win the presidency and then dominate the political agenda" (Mauceri 1995, 20). Uribe skillfully exploited a similar vacuum, also appointing opposition politicians to senior positions in his administration and forming a powerful and enduring coalition with backing from the military, business elite, large landowners, regional politicians, and drug barons (Bejarano 2013, 336). Despite their extraordinary popularity, neither candidate was particularly successful in translating their support into support for their successors, policy reforms, or down-list candidates, frequently loosing or barely winning referenda on constitutional reforms and subnational elections in spite of sky-high popularity (Atehortúa Cruz 2007; Schmidt 2000). Fujimori and Uribe's hand-selected successors continually struggled to enjoy any semblance of the popu-larity conferred to their predecessors.

Top-Down Mobilization, Concentrating Power

Once in office, both leaders consolidated power in the presidency both horizon-tally over other branches of government and vertically over regional and local government to astonishing degrees, bypassing or subordinating existing demo-cratic institutions, eliminating institutional counterweights to executive power,

attacking oversight organizations, and governing from the top down to such a degree that it fundamentally distorted the democratic balance of power in Peru and Colombia alike (García Villegas and Revelo Rebolledo 2009; Roberts 1995). Fujimori and Uribe blamed their respective countries' problems on do-nothing legislatures and obstructionist judiciaries and immediately set about consolidating compliant congressional supermajorities that served as little more than rubber stamps on executive initiatives, using them to redraft their constitutions, in part or in whole, to allow for presidential reelection (Atehortúa Cruz 2007; Bejarano 2010; Burt 2006; Schmidt 2000). Both men went about stacking the courts, consolidating or eliminating justice institutions, dismissing federal prosecutors, and appointing compliant "provisional" appointees in what amounted to a "wholesale takeover of the judiciary" (Conaghan 2002, 117; García Villegas and Revelo Rebolledo 2009). Both men purged the police, military, and civil service of all top brass, and replaced meritocratic promotions with obsequious, ill-prepared novices marked by "neither competence nor meritocracy" in order to achieve "unconditional support" and subservience (Bejarano 2010, 18; Bowen 2000; Duzán 2004). A revolving door of ministers was either dispassionately fired or rewarded with cushy positions in foreign embassies if they took the fall for government malfeasance without implicating the President (Atehortúa Cruz 2007; Bowen 2000). Both men routinely bypassed senior administration officials communicating directly with low-level field officers or sycophantic underlings mockingly referred to, in Uribe's case, as "kindergarteners" (Duzán 2004, 36). They also went around their ministers, making policy decisions with an intimate shadow cabinet of informal advisors comprised family members, childhood friends, and members of the intelligence community or military (Duzán 2004; Mauceri 1995).

Fujimori and Uribe consolidated control over the media, using a system of carrots and sticks to reward obsequious journalists with intimate access, inside scoops, and offices in the presidential palace while marginalizing, persecuting, banning, and incarcerating the rest (Bowen 2000; Duzán 2004). Both men traveled continuously, inaugurating public works and meeting directly with constituents in community councils where they would directly respond to citizen's petitions for tangible good, hand out "little checks" of money, and commit to local development initiatives on the spot, funneling money directly through newly created presidential agencies to distribute patronage funds[3] in exchange for electoral loyalty (Bejarano 2013; Duzán 2004; Roberts 1995; Rousseau 2010; Schmidt 2000). These incessant community councils and public works inaugurations garnered widespread criticism of abuse of office to dominate press coverage during their campaigns (Conaghan 2002). Both leaders were also criticized for displacing existing political institutions, forcing local residents to negotiate directly with the president, personalizing the state, and sidelining regional and local government, political parties, labor unions, and community organizations (Atehortúa Cruz 2007; García Villegas and Revelo Rebolledo 2009).

Eclectic Anti-Elitism or Unflapping Mano Dura?

Fujimori and Uribe both largely left economic policy to career economists in their central banks and international lending agencies which advocated the neo-liberal macroeconomic orthodoxy of the time (Bowen 2000; García Villegas and Revelo Rebolledo 2009). Both ~~leader's~~ antiestablishment discourse evolved over time, moving from targeting fiscal austerity, the *partidocracia*, and finally, corruption, in the case of Fujimori, while Uribe first focused on congressional "corruption and politicking," then the Constitutional Court, and finally the Supreme Court (Bejarano 2013; Roberts 1995). Yet both presidents had one consistent enemy throughout their time ~~and~~ office: internal armed insurgents they called "terrorists." Similarly, both presidents consistently held to one mano dura security policy that formed the "backbone" of their governments (Duzán 2004, 64). They both denied the existence of an armed conflict, reduced the insurgents to terrorists, rejected any negotiation with them out of hand, militarized the armed conflict and everyday policing, and framed the president as a divine warrior, sent by god to save the country from violent terrorists (Hunt 2006, 2009). Mired in decades of violent conflict that only escalated in the immediate aftermath of each of their elections, this policy deeply resonated with voters for whom insecurity was their primary concern (Criscione and Vignolo 2014; Rousseau 2010).

Both presidents were keen to take responsibility – and to accept recognition – for any blows to the insurgents and all matters of internal security generally, reenacting scenes of military conquest for television crews and holding high-profile press conferences that asserted themselves as commander-in-chief (Bowen 2000; Duzán 2004, 121). With both leaders refusing to negotiate with guerrilla insurgents, they doubled down on their roles as messianic, forgiving fathers, investing significant resources in efforts to encourage defections and get insurgents to turn themselves in, promising to show mercy and forgiveness to terrorists who surrendered unconditionally and confessed their crimes. Both presidents were able to claim incredible success as their countries experienced important security improvements, including stark reductions in battle deaths, homicide rates, massacres, kidnappings, bombings, and attacks on infrastructure, racking up significant military advantages against insurgents by capturing or killing most top commanders and reclaiming the vast expanses of territory that had previously been under guerrilla control (Schmidt 2000).

Despite defeating the insurgency early in his tenure, Fujimori never wavered in his commitment to mano dura policies, showcasing his security achievements – each of which conferred significant boosts to his approval ratings – before each election, warning of a resurgence of terrorist violence without him at the helm and engaging in massive disinformation campaigns including publicizing false reports of terrorist activity (Burt 2006; Mauceri 1995). Despite opposition from human rights groups, "Peruvians at large generally welcomed Fujimori's tough stance" against crime and violence (Bowen 2000, 292). "Control of terrorism" was

ranked as the most positive aspect of Fujimori's first and second terms, and his victory over guerrilla groups was the number one reason people voted for him in his third bid for office in 2000, with 64% of voters choosing Fujimori because he "defeated terrorism" (Arce 2003, 572–573). "Indeed, Peruvians were inclined to overlook almost any fault because Fujimori had restored a sense of order to their lives" (Schmidt 2000, 104). Even in 2007 as Fujimori was being tried in court for his part in extrajudicial killings, supporters insisted that "The legacy of Alberto Fujimori in today's Peru is peace" (Rousseau 2010, 150).

During Uribe's eight years in office, Colombians also experienced important security improvements, and despite continuous scandals and ongoing imperfections, trust in Uribe and the military – the organization in charge of carrying out his signature policy – remained in lockstep at 70% throughout his time in office, far and away the two institutions with the highest levels of trust and approval from citizens at the start of the 21st century (DANE 2009, 42).

> Unlike other countries, where a host of socioeconomic issues may be at the root of the crisis that gives way to populist mobilization, in Colombia insecurity became the main axis of polarization within society and the central issue around which new political loyalties came to be articulated since 2002.
>
> *Bejarano 2013, 328–329*

Uribe declared that the country was "coming out of a collective kidnapping" and public opinion seemed to agree (Criscione and Vignolo 2014, 478). "Not a year had passed since [Uribe] took office before three-quarters of Colombians of all social classes and political affiliations perceived that the state had reconquered the [national] territory" (Palacios 2012, 169).

Corruption and Clientelism

Fujimori and Uribe's clientelistic use of community councils to distribute funds directly from the executive office to local communities and individuals through cash payments, infrastructure projects, and social spending, bypassing planning and budgeting procedures and explicitly conditioning patronage funds on political support, has been well-documented (Bejarano 2013; García Villegas and Revelo Rebolledo 2009; *Las perlas* 2010; Roberts 1995; Schmidt 2000). But both men also oversaw vast illicit enrichment schemes that redistributed national resources to the wealthy. Fujimori stole an estimated $1 billion for himself and the elite of Peru, lining the pockets of the media, business, military, and political elite in exchange for political support. "Unable to resist the lucrative payoffs and other perks offered up by Montesinos, media executives joined military officers, election officials, judges, legislators, and businessmen in collaborating to keep Fujimori in office" (Conaghan 2002, 115). Uribe, in turn, favored handing out desirable

posts in foreign embassies as patronage, buying congressional votes, declaring tax exemptions and public subsidies for friends, family, and agribusinesses, and legalizing land grabs by drug trafficking rural oligarchs who displaced peasants in order to seize their land in what has been called a "reverse agrarian reform" that concentrated half of the country's land in the hands of just 1% of its population (Bejarano 2013; *Las perlas* 2010; Reyes 2016).

Neither leader relied solely on clientelism and corruption to buy support, however. They both deployed rampant violence and fear through a radical militarization of civil society and their internal armed conflicts (*Las perlas* 2010). Both presidents placed large swaths of land under military control, occupied public universities, expanded the role of the military in policing and local service provision, created dozens of new brigades, used US counternarcotic monies to purchase new military aircraft and arsenals, and vociferously defended the military from accusations of human rights abuses. At the same time, they forced civilians to participate in counterinsurgency activities, arming and training various rural "self-defense" forces and building enormous networks of paid informants (Burt 2006; Hunt 2012; Mauceri 1995). Both allowed top-secret paramilitary death squads to run out of their domestic intelligence agencies and went about "criminally and terrifyingly hunting down human rights defenders and the political opposition" (Morris 2010, 160). They targeted regime critics, political opponents, union leaders, human rights activists, reporters, and even Supreme Court Justices – labeling them all terrorists and subjecting them to illegal wiretapping and surveillance, bogus criminal or civil investigations, death threats, disappearances, torture, assassinations, and massacres with the specific goal of silencing or "neutralizing" them (ibid., 170; see also Burt 2006; Bowen 2000). According to the Interamerican Court for Human Rights (CIDH), "this level of persecution is unimaginable in a democracy," reminiscent, in both cases, of Southern Cone dictatorships (ibid., 172).

Recurrent scandals led many people to refer to Fujimori and Uribe as "Teflon" presidents, but they ruled because of violence, not in spite of it. Outright intimidation and persecution of the opposition created a culture of fear that impeded opposition groups from mounting an organized challenge, articulating a coherent alternative, or mobilizing a critical mass (Burt 2006). During the 2000 election, over two-thirds of the population feared military intervention in favor of Fujimori (Schmidt 2000, 106, 126).

> Fear became more palpable after [Army intelligence agent Mariella] Barreto [was found dead, her dismembered body parts dumped along the road outside of Lima]. People think, "If they [the Servicio de Inteligencia Nacional – SIN] do this to one of their own, what might they do to us?" said one opposition legislator… we don't want what happened to Mariella Barreto to happen to us.
>
> *Burt 2006, 54*

Asked why she did not engage in public protest against Fujimori, one community activist answered: "Anyone who speaks up is a terrorist (*Quién habla es terrorista*)" (ibid.). Uribe, too, deployed rampant violence "to silence and eventually eliminate any glimpse of opposition or alternative project for change" (Bejarano 2013, 335). Anyone who questioned the regime was denounced by Uribe as "miserable liars," "delinquents," and "international mouthpieces of the FARC [Revolutionary Armed Forces of Colombia]" (Orozco Tascón 2010, 98, 107). Under threat of assassination by secret police, "the guarantees of self-expression without fear grew narrower every day" (ibid.)

According to the Peruvian Truth and Reconciliation Commission (CVR), the state and its paramilitary "irregular forces" such as peasant self-defense patrols engaged in systematic human rights violations during the Peruvian civil war, responsible for 40% of the 68,000 dead in the political violence between 1980 and 2000, 8,000 disappearances, and thousands of illegal detentions, torture, wrongful convictions, and imprisonment (CVR 2003). In Colombia, military and paramilitary affiliates were also responsible for just over half of the 262,000 civilian deaths, commissioning thousands of massacres and assassinating an estimated 10,000 individuals – mostly poor young men, many with intellectual disabilities who were falsely presented as fallen guerrilla fighters (Atehortúa Cruz 2007; JEP 2021). Like Fujimori, Uribe embarked on a "profoundly conservative" political project in order to "retain power in the hands of those who already had it" by using violence "to silence and eventually eliminate any glimpse of opposition or alternative project for change" (Bejarano 2013, 335).

Analysis

This brief comparison suggests that if Alberto Fujimori was a populist, then so too was Álvaro Uribe. Both men defeated establishment candidates by running as political outsiders at moments of acute crisis, creating their own electoral movements by holding "democratic workshops" around the country. They both enjoyed extraordinary popular support, winning ~~repetitive~~ elections by wide margins and building notably broad and enduring political coalitions around their name brands that allowed them to co-opt the legislature and bypass or undermine the judiciary and oversight organizations, eliminating checks on executive power. Both presidents delighted in top-down processes of political mobilization, bypassing institutionalized forms of mediation in exchange for direct contact with the people through constituent assemblies held throughout the country where they personally doled out material benefits. Finally, both leaders abdicated control over economic policy to economists and international lenders, focusing instead on consistent mano dura policies against "terrorists," massive illicit enrichment schemes that bought elite support, and widespread, pervasive violence and fear.

These findings challenge common tropes of paternalism, fungibility, the pathology of the poor, the primacy of economic variables, and the absence or

benevolence of right-wing violence within studies of populism. Drawing on a long tradition of framing populist leaders as "fathers of the nation," Roberts (1995) described Fujimori's rule as "paternal." Yet he lacked any sustained analysis or comparison of this "paternal" rule, making the gendered nature of his power seem self-evident. The effect has been to use "paternalism" as a tautology that suggests that powerful men are seen as father figures, and father figures are powerful men, without rigorous examination of the concept or much in the way of empirical evidence. This analysis aligns with a number of other studies in suggesting that successful populist executives are seen more as *national saviors* than mortal fathers (Zúquete 2008). Moreover, these demigods have embraced, perpetuated, or glorified misogynistic violence against women that challenges prima facie assumptions of paternalism. This process of deification and its relation to violence against women cannot be understood by assuming that powerful men are simply paternal and that average citizens naturally crave father figures in their politicians. Deification and other gendered performances appear to be constitutive of populist power, and mainstream scholars must move beyond assumptions that all nations need and naturally welcome a national patriarch to rigorous comparative studies of when, why, how, and to what end right-wing populist leadership is gendered.

A related tension in Western studies of populism is the insistence that populist power is both fungible and deeply personalistic, invested only in the populist. Populists are often believed to command support for policy initiatives, down-list candidates, and successors with the snap of their fingers. This myth informs speculation of populism as "rule by plebiscite," as feared by Weyland (2001) and the unfound categorization of a populist's successor and/or homologues as similarly populist by virtue of geographic or historic coincidence. This comparative case study demonstrates that neither executive was particularly successful in translating his extraordinary popularity into support for his policy reforms, down-list candidates, or handpicked successors. Nor did they automatically infect or inspire right-wing populism in their executive peers. This study suggests that scholars should be careful of conceptual contamination, refrain from dismissing every policy and person in contact with a populist executive as populist in their own right, and evaluate each individual or policy separately. Failing to do so avoids identifying and grappling with the unique way populists personalize the state and political power.

Second, despite widespread agreement that populism is a political, not an economic, phenomenon, scholars continue to operationalize populism primarily in economic terms by focusing on the pathological mobilization and participation of the poor, the primacy of macroeconomic crises and policies, and the centrality of public spending and patronage to populist regimes. Roberts (1995) himself highlighted the role of economic crisis and policy response to the exclusion of other policy arenas and identified the poor as the key constituency in Fujimori's "*multiclass* political coalition concentrated in *subaltern* sectors of society." He

defined subaltern in purely economic terms as the working poor and informal sectors, and focused almost exclusively on the power of resource windfalls to buy poor people's support through investment in poverty alleviation programs, but such explanations of populism are partial, at best. Hugo Chávez, for example, increased his share of the vote from 56% in 1998 to nearly 60% in 2000 and maintained significant popular approval before commodity prices spiked in 2003, conferring the ability to invest in social services (Flores Macias 2012). Neither Fujimori nor Uribe had any resources to speak of before their elections in 1990 and 2002, respectively, so that factor cannot explain their upset victories. Uribe never did have any economic success or windfalls, reliant instead on aid from the United States to fund his war. Fujimori's economic "windfall" from privatizations did fuel much-needed infrastructure projects and social spending in the lead-up to the 1995 election, but these one-time payments dried up shortly after and cannot explain his prior or subsequent popularity or electoral success, particularly his extraordinary popularity in the aftermath of his 1992 self-coup. In general, Western scholars tend to problematize poor people's economic and political inclusion, arguing that populists "whip up support from largely unorganized masses to win office" (Weyland 2001, 12). Consistently reducing the poor to "unorganized" and politically naïve "masses" is particularly troubling because it is directly at odds with explicit and detailed descriptions of the way in which populist success is reliant on the co-optation of existing grassroots organizations such as soup kitchens, suffrage groups, and local health initiatives (Kampwirth 2010).

In both cases at hand, elite actors were far more important than "subalterns" in the construction and exercise of populist power. Their coalitions were more precisely *multisectoral* than multiclass, drawing key support from religious, cultural, political, economic, and military elites in what is more aptly described as *heterogeneous social constituencies*. Fujimori's popularity was not uniquely concentrated in subaltern sectors of society that were bought out by legal but clientelistic economic redistribution, but among military, business, and economic elite interested and engaged in illicit self-enrichment. Fujimori's approval ratings among elites were consistently higher than his approval ratings among the general populace. A late 1990 poll showed that 95% of top businessmen supported Fujimori and 73% of them predicted his policies would be successful, far higher percentages than in any other sector of the population, despite the fact that his economic policies had not yet borne fruit and he hadn't developed a counterterrorism strategy at all (Bowen 2000, 76). Similarly, wealthy urban districts voted overwhelmingly to approve the 1993 constitution in sharp contrast with the poor urban neighborhoods and rural provinces who refused to endorse the coup despite supporting him in 1990 (Mauceri 1995). Peru's regime has long been the product of strategic calculations by elites weighing the relative economic costs and benefits for themselves of authoritarianism and democracy (McClintock 1989). Fujimori's popularity wasn't contingent upon either the poor or policy success; it was dependent on elites who turned a blind eye to Fujimori's abuses in order

to grab the opportunity to reshape the scope and nature of state power in Peru while enriching themselves through the privatization of state assets (Mauceri 1995, 8). "The Peruvian experience points to a deeply disturbing fact: the persistence of non-democratic attitudes and behavior in the highest echelons of Latin America's socioeconomic elite" (Conaghan 2002, 116). Similarly, Uribe built a broad coalition notable for the inclusion of elites rather than any particular subaltern group. With firm backing from the military, Uribe's primary constituents were the "landed oligarchy" who he represented, defended, and "even redeemed" in an "unholy alliance of big landowners, regional politicians, and drug barons who stood together behind the armed project of the paramilitary groups during the last two decades of the twentieth century" (Bejarano 2013, 336–337). Uribe's government favored businessmen and large landowners, and inequality grew during his administration (Fierrro 2014, 131). The poor, rural regions most affected by his paramilitary violence, and large urban centers with sizeable educated middle classes like Bogotá were the most likely to vote against Uribe and his policies. Exclusively focusing on clientelistic, but not illegal, and desperately needed investments in education, health, and infrastructure to the exclusion of massive illegal transfers of billions of dollars in public funds to the upper echelons of society obscures how populists obtain and reproduce their power, though it certainly illuminates deeply engrained biases in Western knowledge production.

Finally, Fujimori and Uribe both embraced consistent, not eclectic, anti-insurgency policies. This is not the "thin-centered" ideology described by Mudde (2017, 30) that displays little intellectual refinement or consistency by enacting "whatever the people want." These populists consistently advocated law and order policies, using their acute security (not economic or manufactured identity) crises to justify tough-on-crime *mano dura* policies that consistently framed political insurgencies – not elite – as terroristic threats to the country, to resounding approval. Accordingly, they both militarized their counterinsurgency strategy and civil society, made vast use of paramilitary death squads and civilian "self-defense" forces, and turned their intelligence agencies into terrorist organizations which they used to eliminate opposition to the president through murder, illegal surveillance and phone tapping, massacres, death threats, torture, and spurious criminal and civil charges. Recurrent scandals revealing the violence and corruption of these leaders led both to be referred to as "Teflon" presidents, but they ruled because of violence, not in spite of it. Fujimori and Uribe deployed the explicit and pervasive use of violence to silence critics, impede the emergence of countermovements or political alternatives, and create the image of overwhelming and unquestioned popularity that was essential to their populist project (Burt 2006). This analysis challenges an easy demarcation between fascism and populist democracy based on the regime's deployment of violence as espoused by Finchelstein (2017). It also reveals disturbing tendencies among Western scholars to dismiss or downplay

devastating right–wing violence as limited, justified, or cleansing (e.g., Levitsky and Loxton 2013). Western scholars must unequivocally acknowledge that violence *always and directly* contravenes democracy and explore disciplinary assumptions that render state-led or right–wing violence – if enacted by US allies – more compatible with democracy than economic redistribution.

Conclusion

Recent studies of populism from Western academics have flatly ignored the large body of accumulated knowledge on the topic derived from Latin America, insistently reducing Latin American populism to "left-wing" populism exemplified by Hugo Chávez, dismissing the populist nature of US allies out of hand, deploying atheoretical and unsubstantiated tropes in the study of populism, and using populism as a political cudgel against leaders who are out of favor with the United States, regardless of what local knowledge and evidence indicate. I call this process *intellectual imperialism*: overlooking or appropriating the vast body of knowledge on populism produced in Latin America while selectively choosing cases and interpreting data in order to arrive at preconceived conclusions that parrot US foreign policy priorities. This chapter identifies five tropes in English-language studies of Latin American populism: paternalism and fungibility, the primacy of economic variables and the pathology of the poor, eclectic policies, and the compatibility of state-led violence with democracy. These tropes obscure gendered processes of deification, the centrality of elite support and corruption, the primacy of *mano dura* security policies, and the use of violence deployed by populist presidents from Nayib Bukele to Rodrigo Duterte, Donald Trump, and Viktor Orbán. Transcending the false divide between "right-wing" (European) and "left-wing" (Latin American) populists and building a universal understanding of right-wing populism requires remedying historic selection bias that has trained Western eyes on a handful of examples by examining previously ignored cases and sources and recommitting to a level of intellectual integrity that forestalls the manipulation of data and concepts to serve preconceived political ends.

Notes

1 Rovira Kaltwasser et al. (2017) and others have fought to divide studies of populism into "political-strategic," "ideational," or "socio-cultural" approaches. I personally find such divisions limiting and definitions partial, and this definition incorporates elements of all three.
2 "Teflon" effect is related to a political power that shields incumbents from being prosecuted from criminal charges.
3 Ministry of the Presidency, in Peru, and the Presidential Agency for Social Action and International Cooperation, in Colombia.

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3

POPULAR SOVEREIGNTY, INSTITUTIONALITY, AND THE DILEMMAS OF DEMOCRATIZING DEMOCRACY

Anthony Spanakos[1]

This chapter puts forward a definition of populism as an ideology that assumes that there is a misalignment of the *kratos* (structure or form of primary governance) and *demos* (the legitimate decision-making body or its representative) in terms of justice that is deliberate, systematic, and, at least partially, resolvable through electoral politics. As with any other ideology, it allows adherents to make sense of the world. While there has been a deluge of writing about populism of late, populist *politics* – that is, the mechanisms for attempting to follow through on populist claims and concerns – are what genuinely attract the attention of political scientists. Populist politics are *anti-status quo* in rhetoric but display considerable diversity in their mode of concretization. This chapter argues that the way that populist politicians view institutions can be critical in understanding this variance. Separating populist politicians according to the mode of change to the institutional structure of the polity pursued helps explain why some populists appear more "anti-institutionalist" than others. It also gives insight into whether populist politicians are likely to dismantle democracy although this chapter urges some caution in making such judgments.

What Is Populism?

Why Ask This Question?

Political scientists struggle with words in ways that the political leaders and citizens they study do not. What populism is ~~does~~ requires little explanation to the latter but "is it not obvious?" does not get scholarly work past peer review. The immediacy of an empirical context allows voters to make judgments on whether candidates, parties, platforms, policies, or speeches are populist and whether that is

desirable. Political scientists, at some distance, are cautious about applying the label to a person or thing if that person or thing is sufficiently different than others that fit the category. The consequences for a citizen to call a politician populist are that he or she might vote a certain way and perhaps persuade others to do likewise. One consequence of a scholar calling a politician populist is that that politician's speeches, policies, or activities will be incorporated into some data set to test causal propositions or to understand how populists work and what impact they have on polities.

Consider the issue of democracy. Levitsky and Way (2015) argued the alleged decline in democracy in the world that some political scientists have observed was largely a function of mislabeling political systems as democratic in the past. If there are three (or 30) "populist" politicians who are populist for different reasons or in different ways, their populism may produce diverse outcomes because it is not a single thing. That is, the causal mechanisms will be obscured[2] and that may raise a problem for social science. Müller (2016, 58) is blunter, asking "[m]ight the popularity of diagnosing all kinds of different phenomena as 'populism' be a failure of political judgment?"

Populism is a particularly difficult concept because it has a range of meanings *and* it is widely used in academic studies and popular writings. That there may be need for clarification is not new (Weyland 2001) nor is the recognition of populism as drawing on and participating in key aspects of democracy (Panizza 2005). Scholarly anxiety about understanding populism waxes and wanes and it has been particularly intense in recent years. Populism invokes the "sovereignty of the people" (Jagers and Walgrave 2007, 73) and involves "[s]ome kind of revolt against the established structure of power in the name of the people" (Canovan 1999, 3). Neither of these is *necessarily* unique to populism nor dangerous for liberal democracy. But scholars have identified many reasons for concern. Populist discourse is anti–pluralist (Müller 2016), results from weak government performance and poor representative institutions (de la Torre 2015; Levitsky 2021), can hasten democratic breakdown (Levitsky and Loxton 2013), can be exclusive and inclusive (Kalyvas 2019; Mudde and Rovira Kaltwasser 2013; Rio Francos 2020), can facilitate grassroots and top–down organizing (Panizza 2009), and can intensify and politicize antagonisms in society (de la Torre 2015; Roberts 2016). While many political scientists admit that populism is not inherently antidemocratic, they generally agree with Mudde (2021) that it is antiliberal democratic in practice, if not in principle as well (Müller 2016). That most political scientists see populism as likely to degrade liberal democracy (Ochoa Espejo 2016**)** does not mean that there is agreement about what it is and what its effects are.

Populism in Political Science Literature

Early research (Germani 1978) thought of populism as an orientation for a regime or as a set of profligate economic policies (Dornbush and Edwards 1991). Since

the 2000s, there have been two primary approaches, though these are not mutually exclusive. The first considers populism to be a political strategy used by a charismatic figure to collect various citizens who feel marginalized by the actual political system into a single, ambiguous category (the people) which is then opposed to those who benefit from the current political arrangements (Corrales 2006; Levitsky and Roberts 2011; Weyland 2001). The other approach is more ideational and/or discursive and it thinks of populism as a means of people-forming through discourse practices and public performances that distinguish the moral, long-suffering people from the immoral elites (Laclau 2005; Ostiguy, Panizza, and Moffett 2021; Panizza 2005). This approach has received considerable attention (Aslanidis 2016; Hawkins 2011; Mudde and Kaltwasser 2013) and Mudde (2021) argues that there is increasingly a consensus about the utility of conceptualizing populism as a "thin-centered ideology" (Mudde and Kaltwasser 2013), "an ideology…[in which] society…[is] separated into two homogenous and antagonistic groups…. Which argues that politics should be an expression of the *volonté générale* (general will) of the people" (Mudde 2004, 543).[3] Some work within the ideational school has moved away from thinking of populism as a thin-centered ideology, preferring instead to look at style (cultural lows/highs) and performative acts (Ostiguy, Panizza, and Moffitt 2021) or has explicitly eschewed the notion, preferring to think of it in terms of frames (Aslanidis 2016; also Bonikowski and Girdon 2016). These cases focus on the use of "we-ness" grounded in particular cultural, moral, emotional, and political discourses rather than a more typical ideological axis.

The concept of a "thin" ideology emerged in Freeden (2006) which aimed to reduce the conceptual burden that had been placed upon ideology by scholars who assumed that an ideology involves a fixed and specific menu of policies, mobilizing techniques, alliance-formation, and politics more generally. Freeden (2006) noted that ideologies could be identified by the presence of core values and then a range of values that are of varying importance (thus, liberalism has a core value of individual autonomy which can be associated in differing degrees with a range of positions on government, economic regulation, religious thought, and so on). Yet even with a less restrictive notion of ideology, Freeden doubted whether populism was an ideology. Aslanidis (2016) goes further arguing that populism fails to be an ideology, even a thin one, and that thinking about it thus is misleading. It fails because it lacks "far-ranging policy implications" and "dedicated partisans" unlike socialism and liberalism (Aslanidis 2016, 89). Such expectations might be unwarranted or, at least, unnecessarily demanding. Heywood's sixth edition of *Political Ideologies* includes chapters on socialism, liberalism, conservatism, anarchism, nationalism, fascism, feminism, green ideology, multiculturalism, and Islamism. (2017). It is not clear that Aslanidis' requirements would be present and in evidence in these ideological isms. Moreover, Freeden and Aslanidis' judgment of populism may be hasty. Populism does indeed have a core value (see section 1.4) and a range of associated values appear. This chapter argues that the core value is

an opposition to an entrenched *pleonectic* system, which harms the people while other values include opposition to indirect forms of representation, technocratic decision-making, support for minority rights, and ~~supporting~~ popular sovereignty, direct democracy, and/or decisive executive action.[4]

What Is Ideology?

Heywood identified three components of ideology that are consistent with populism. ~~These ideologies are as follows~~:

1. Provide a perspective, or "lens" through which the world is understood and explained. People do not see the world as it is, but only as they expect it to be: in other words, they see it through a veil of ingrained beliefs, opinions, and assumptions…
2. …Help to shape the nature of political systems…[and]
3. Can act as "a form of cement, providing social groups, and indeed whole societies, with a set of unifying beliefs and values" (Heywood 2017, 2–3).

That is, ideology is an attempt to understand reality with a preexisting, largely inalterable framework that supplies believers with answers for all things and shelters them from the possibility of surprise (Voegelin 1987, 30). As Arendt notes, an ideology "insists on a 'truer' reality concealed behind all perceptible things" (Arendt 1976, 470) which it alone sees. In this way, it is similar to Taylor's "imaginary" which is "not a set of ideas; rather, it is what enables, through making sense of, the practices of a society" (Taylor 2004, 2).

Ideology creates and encourages the development of codes, symbols, gestures, and acts that have particular meaning to those who partake, and which differentiate them from others. It need not lead to particular political action but it does contribute to the intensification of relationships of fellowship and belonging (what Putnam [2000] calls "bonding"), within a group that shares a common mental-normative map, and othering of those outside. An ideologue neither persuades nor listens. Rather, he or she commiserates with fellows and strikes against adversaries. Meaningful debate is not possible as the speaker is closed off to wonder, surprise, and uncertainty. Populists do not say "I think the neoliberal economic model imposed by the rapacious unpatriotic elites brought mass hunger and constitutes systemic violence against the people, but I could be wrong. What do you think?"

Populism as Ideology

Populism can be considered an ideology in the vein noted above. It assumes a deliberate and resolvable misalignment in terms of justice between political form (*kratos* or institutional/constitutional structure) and political identity (*demos*, the people) in a polity where elections are politically meaningful. Core elements are that: the

slight done to the people is deliberate, perpetrated by a group in power who use a structure to perpetuate the harm (as well as the in-group's privilege), and that the injustice against the people is unwarranted but can be resolved through political (and, at least partially, electoral) means. These are core beliefs (Freeden 2006) and no populism does not have these elements in a clear sense. Ancillary to these are the following assumptions: there is a normative/administrative structure that rewards the *pleonexia* of the few and harms the people; an anti-status quo position; a politicization of justice as restoring what rightly is of the people; a defense of the morally good people; the belief that the people should be united and that enemies should be defenestrated and/or not be able to hide behind institutions and laws to protect their advantage; institutions of horizontal accountability limit the agency of the people (local level) or the executive (the national representative of the people); and that people should interact with their fellows and see the political in all discussion and life. Much of the above tends to encourage an anti-populism with a similar orientation of all friendship, discourse, and life along political lines of group demarcation.[5] Populism is, then, a framework for making sense of the world, which "helps to shape the nature of political systems" and it helps to build bonds within groups in society (Heywood 2017, 2–3).

Scholarly research on populism, whether of the strategic or ideational variant, assigns particular weight to rhetoric. For the former, words are ways of overcoming weak political institutions and ambiguous political ideologies and/or tools for winning over politically naive or charisma-hungry people who do not *a priori* share ideological or class interests (see Weyland 2001; 2020). For the latter, speech and political acts constitute the people itself in the process of establishing a relationship between populist politician/movement and adherents (Laclau 2005; Spanakos 2008). Ostiguy (2009) highlights how populist politicians speak and act outside of the bounds of the (putatively) publicly sayable, engaging in a form of "low politics." In so doing, they attempt to recreate public discourse (if not public space and affairs more broadly) and they drive polarization in both the actions of their movement and responses that emerge, bringing about an intensification of politics which becomes the explanatory key for all aspects of the life and activities of people within the polity. When such totalization is achieved – evident in the rupturing of friendships, deliberate efforts to reside in neighborhoods of fellows, the loading of quotidian language with clues that someone is "on one side" – it is easier to recognize populism *qua* ideology.[6]

Populist Politics

What is normally of interest to political scientists is not populism *per se* but populist politics. It is the *praxis* of populism and its ramifications. Understanding such is vexing because of the considerable variation *within* populist politics. These comments highlight the importance of separating populism *qua* ideology from the means through which populists put their preferences into political terms. As is

the case with any ideology, this involves compromise, inconsistencies, and contra-
diction, and the politics are often carried out by some whose commitment to the
ideology is superficial. While populism does not determine any particular mode
of political activity, this chapter will argue that the vision of institutionality of the
members of the populist political community can explain what populist politics
look like in a specific time and place.

Variety in Populist Politics

A world view that encourages rebellion against a system in which the undeserving
are disproportionately resource-laden as a result of a systemic bias against the good
members of the society does not necessitate any particular set of policies or regime
orientations. Not surprisingly, there is much diversity among the populisms of the
19th century (*narodniki* in Russia, Populists in the United States), early- to mid-
20th century (Lázaro Cárdenas in Mexico, Getúlio Vargas in Brazil, the *Alianza
Popular Revolucionaria Americana* – APRA party in Peru), and later 20th century
(Andreas Papandreou in Greece, Anwar Sadat In Egypt), neo-populists (Fujimori
in Peru, Collor de Mello in Brazil, Carlos Andrés Pérez in Venezuela), or the 21st-
century populisms (Chávez in Venezuela, Morales in Bolivia, Correa in Ecuador),
right-wing/nationalist/or patriotic (National Front in France, Law, and Justice in
Poland, Fidesz in Hungary, Trump in the United States), and left-wing populisms
(SYRIZA – the Coalition of the Radical Left – Progressive Alliance – in Greece,
Podemos in Spain). The differences in matters of policy and politics are substan-
tial in many cases (RioFrancos 2020), yet there is quite a bit of similarity in
terms of style and performance (Ostiguy, Panizza, and Moffitt 2021; Houle and
Kenny forthcoming). While some scholars emphasize differences between left/
inclusionary and right/exclusionary populisms (Mudde and Kaltwasser 2013;
RioFrancos 2020; Kalyvas 2019), the primary divisions addressed by political
scientists are about populist politics insofar as the actors involved seem to demon-
strate antiliberal, anti-pluralist, and anti-institutional positions.

The first two subjects have received considerable attention in the scholarly lit-
erature (Levitsky and Roberts 2011; Müller 2016; Spanakos 2011; 2013; Weyland,
Madrid, and Hunter 2010). This chapter examines claims about populist politics as
anti-institutional, claims that received particular attention in studies of the "Pink
Tide" leftist governments (Cleary 2006; Levitsky and Roberts 2011; Panizza
2009; Weyland, Madrid, and Hunter 2010) which separated populist governments
according to whether they pertained to the "institutional" or "anti-institutional"
left. This distinction was important because populist politics tend to, and in the
more "anti-institutional cases" unquestionably, lead to an accumulation of power
that exceeds traditional authority for the executive while weakening the oversight
ability and tainting the perceived legitimacy of other branches of government and
organized institutional actors (media, political parties) to interfere with the will
of the people (Corrales 2006; de la Torre 2015). This does not only happen at the

level of the national executive but can happen at state and local levels and it can also involve issues connected with federalism (such as the Venezuelan National Assembly reducing the authority of the Mayor of Caracas 2009).

Changing *de facto* and *de jure* rules as well as reducing the ability of the government to constrain itself are both of concern particularly if liberal democracy is the norm (see Munck 2015; Ochoa Espejo 2015). Institutions, whether as rules political actors accept or as organizational bodies with coercive power to enforce compliance, are fundamental to ensure the self-limiting nature of liberal democracy (Schedler et al. 1999).[7] When a political system successfully transitions to a stable democratic regime wherein all relevant actors recognize democratic channels or institutions as the only means to power – institutional will and capacity to conduce legitimate paths to and restraint on government office are considered necessary conditions by most scholars (Linz and Stepan (1996). Thus, challenges to the shape, function, and legitimacy of institutions raise alarm bells as they are considered fundamental to liberal democracy, as a form of regime, and the persistence of liberal democracy over time. Populist politics work within the institutions of electoral politics but they also scoff at, ignore, or sidestep some or many of the basic normative and procedural "rules of the game."

Populism supplies populist politicians with a very good (for adherents) normative justification for such a relationship to the current institutional framework. Institutions – the "system" – are allegedly designed to benefit the elites at the expense of the poor and they are neither neutral nor do they offer universal benefits or mechanisms for *all* citizens. Rather the deck is either stacked against the people or the people are entirely marginalized from these institutions. Institutions are therefore central to the political system against which populist politics rebels. If democracy receives its legitimacy because the people, in some way, rule, then institutions and elites who restrict or prevent popular sovereignty have limited legitimacy, particularly in the face of the legitimacy of an organized people articulating its political will for change (Hardt and Negri 2009). This allows populist political movements to appear casual and even antagonistic toward institutions while out of office and, often, while in office. But how much, if at all, will populist politicians change the institutional structure while in office, and will those changes be threats to democracy, the market, or society? Clearly, much has to do with contextual questions (profound crises, institutional strength of veto players) as well as leadership preferences (see Mainwaring and Pérez–Liñán 2014; Weyland 2020). But the mode through which populist ideology enters politics is very important as well (see Spanakos and Romo Rivas forthcoming).[8]

Institutionality and Populist Politics

All populist politics employ *anti-status quo* rhetoric but political scientists criticize them not for being *anti-status quo* but for being "anti-institutional."[9] Yet, as noted,

the degree to which populist politicians are seen as anti–institutional varies con–siderably (consider Lula da Silva, Bernie Sanders, Andreas Papandreou, Juan Perón, Nestor Kirchner, ~~Recept~~ Tayyip Edrogan, Viktor Orbán, and Hugo Chávez).[10] Why have populist political actors behaved so differently in the face of a fairly similar structure of liberal democratic institutions (on paper) and a greater range of liberal democratic norms of political competition (in actuality)? Building on Spanakos (2015), this chapter suggests four primary visions of institutionality which can help explain the very different routes taken by political leaders.[11] A heuristic is set up with the way populist politicians understand the institutionality of a polity (see Table 3.1). That is, institutionality is not only concerned with actual institutions and their reform but how institutions should shape and concretize the polity, broadly understood, over time. The elements of institutionality are highlighted below: (1) does the group envision a retreat or expansion of the reach of the gov–ernment and state? and (2) should changes in the institutions of government and state be permanent?

Populist political actors with a *restorationist* institutionality tend to see the current governmental and state order as bloated and in need of significant trimming. The critique is only partially economic as the primary concern is that the government has overreached and the state has swollen in order to reward the partisan interests of political parties and supporters that had been in power (often for decades) and have exploited the universal growth in the size and reach of the modern state to maximize the space in which politics occurs.[12] Cutting back the size and reach of the state, even if done with little precision (say a 10 percent across–the–board cut in all ministry budgets and personnel), is seen as a way of "taking back" the country which has been co–opted by a class of bureaucrats who have profited from the growth of administra–tive power. The changes sought by restorationist populist politicians aim to be per–manent and to prevent future "power grabs" by future elected governments. There is a sense that the political system was sounder in the past, the expansion of governments and mandates have weakened governmental authority and legitimacy and made citi–zenship more state–dependent and less free. There is usually an element that addresses morality and identity politics: the expansion of political rights and incorporation of different groups have weakened a sense of common identity and diluted traditional values. To address the above concerns, a successful restorationist effort will not only attempt to pull back the state but will aim to make such changes permanent and to make it harder for future governments to bring about another era of administrative growth and group/particularist rights.

Populist political actors with a *progressive* institutionality believe that the state is too thin to address the many needs of the people whom it has excluded. New ministries, agencies, rights, legislation, and courts are needed. Moreover, new regulations, funding, and accountability mechanisms are necessary for the various bodies of the government and state that exist to make sure that what exists works better for all and what emerges truly helps its targeted populations. In short, the

government and state need to change rapidly, and this will be accomplished by growing these bodies, their mandates, and their personnel. The determination of these new mandates and the pools from which personnel will be dispropor- tionately or exclusively drawn from within the populist political actor's coalition which currently holds office. Like the restorationist institutionality, the progres- sive one accepts the basic structure of government and the state but prefers to expand it significantly, while the restorationist prefers trying to reduce it to the core structure. Similarly, the progressive institutionality believes that the changes in the institutional order are not only necessary but that they will remain necessary and, if anything, more changes will likely be necessary for the future. Therefore, institutional reforms and political actions should be permanent while remaining open to future changes that move in the same direction. Efforts will be made to prevent future reforms that might aim at pulling back on commitments made while the progressive is in office.

The progressive institutionality aims to fix and add to the existing structure by "bringing in" people and issues that were not previously incorporated or taken with the level of seriousness deemed appropriate by the populist political actor. Those who seek to *refound* the institutional order aim to take over the state for the purpose of "remaking it." They have less concern with whether there is much to preserve in the extant institutional order and feel that the institutions of the ruling group it has supplanted should not constrain the will of the people as it refounds the polity. Rather than simply quantitatively changing government and the state, populist political actors with a refounding institutionality seek to establish a new constitution, new institutions, and create a new language of politics that should govern new forms of politics. The new orienting principles, the architecture of politics, and institutional bodies, and normative grounding should be permanent, and they must be established firmly so that future governments cannot undo the changes.

Polemic institutionality also rejects the near entirety of the institutional order, and it seeks a new constitution, institutions, and politics but is more radical in its orientation toward change. The state should be taken and remade and this generally means massive increases in the state at various levels, as well as an extension of politics to all things. It sees the political change it has brought as permanent, but it denies the idea of permanence in politics and insists that the political remain open so that the sovereign power of the people can be maximized (Spanakos 2015). It sees all structures, institutional processes and edifices, and patterns as being exclusive, and it deliberately thinks of all politics, including constitutional politics, as being provisional and experimental.[13] This is, perhaps, the most distinctive aspect of polemic institutionality, that it seeks to institute a new order governed by awakening popular sovereignty, but by delib- erately seeking to not build institutions or institutionalize practices with an eye toward permanence.

TABLE 3.1 Institutionality and Populist Politics

	Restorationist	*Progressive*	*Refoundational*	*Polemic*
Position toward the government and the state	Take the government back from the elites who have co-opted it	Bring the people into the government, to make it the government of the people	Take and remake the state, refound the political order	Take and remake the state, "we are the state"
Position toward institutions	Stop and/or reverse the growth of the state and its agencies, imbue more authority at the local level or central executive (because of popular election), step back from international organizations/commitments	The state should grow to accommodate new groups and interests and build new ministries and organizations (corporatist state or connections with social movements), "*their* institutions should not constrain us"	A new constitution and new institutions are needed. These need not be derived from extant constitutional rules and norms because of popular support	Institutions are bureaucratic and disempower the people; they should facilitate popular sovereignty not serve as a restraint; "the *demos* should be the *kratos*"
Institutionalization (often reliant on charismatic figures who personalize and undermine the political process)	Preference for institutional change to be permanent – future growth to be more reliant on supermajorities. These changes would make the political system less state-dependent and more citizen-driven and democratic	Preference for institutional change to be permanent, creating rules and laws to enshrine new rights and less likely to be rescinded/repealed. These reforms would make democratic capitalism more democratic and stable	Preference for constitutional change to be permanent. Recognition of diverse bodies and agencies should be very difficult to roll back. This new macro-institutional order would make the polity more democratic and enable popular sovereignty	Institutions should be experimental and provisional, the polity should be open so that popular sovereignty is maximized, this openness should be permanent

(*continued*)

TABLE 3.1 Cont.

	Restorationist	Progressive	Refoundational	Polemic
Political orientation	National identity, patriotism, national interest, the danger of cultural Marxism, administrative state	Voice the marginalized as having a special place in the national identity, bringing economic and social recognition	Living well, valuing indigenous or traditional values, the primacy of the people or groups within it for legitimacy claims	Without permanent institutional rules or bodies, the role of an ordering orientation grows – peoples' will, recognition of the marginalized
Examples	Jair Bolsonaro (Brazil), Law and Justice (Poland), Donald Trump (USA)	Juan Perón (Argentina), Getúlio Vargas (Brazil), *Acción Democrática* (Venezuela)	Bolivia (*Movimiento al Socialismo* – MAS) particularly with Evo Morales as president)	Venezuela (Hugo Chávez, less so under Nicolás Maduro)

Note: Table classifies populism in different perspectives following the text.

Institutionalities, Rules of the Game, Limitations, and Democracy

Populist politicians, as anti-*status quo* actors, necessarily attack (at least rhetoric-ally) the norms, laws, institutions, and even constitution in the democratic context where they operate. Supporters see such actions as possible steps toward liberation and the founding of a new, more just polity, while opponents decry them as anti-pluralist efforts to concentrate governmental power in a coalition that seeks to punish alleged traitors and adversaries. The bulk of political science literature on populism leans toward this latter approach as it witnesses how populist rhetoric and actions inside and outside of government often contribute to a weakening of institutions of horizontal accountability and protection of minority rights. In short, populist politics tend to erode liberal mechanisms which have been founda-tional for modern democracy (Spanakos 2011). At the same time, not all populist politics lead to the collapse of democracy nor are populist politics the only poten-tial cause for such. Populist politics could contribute to democracy in important ways (Kalyvas 2019; Levitksy and Ziblatt 2018).

Populist politics represent a threat (promise) for opponents (supporters) regarding democracy, markets, and society and, as such, can accelerate the dismant-ling (restoration or final achievement) of democracy.[14] It is difficult to make a clear statement as to when populist politics are the one and not the other. Examining populist politics according to the means why they attempt to concretize their vision of ideal political order (their institutionality) can highlight the depth and scope of challenge to the *status quo* as well as give some insight into some of the means to achieve this which might be permissible to the populists. In general, the more populist politicians aim to change, the more troubling (liberating) will be their limited regard for norms, rules, and institutions for opponents (proponents).

Notes

1 This chapter was improved as a result of comments from Anthony Pereira, Matthew Taylor, and Mishella Romo and other participants of the "Populism in Latin America and Beyond" conference at the Brazil Institute, King's College London, March 18–19, 2021. Further comments were received from Kate Temoney and Arnaud Kurze, and other colleagues at a presentation on April 21, 2021 to the Research on Interdisciplinary Global Studies at Montclair State University.
2 For a thoughtful evaluation of the term "patrimonial" as populism is often used as an epithet, particularly when analyzing developing countries, see Pereira 2016.
3 An interesting fusion of these perspectives is offered by Bonikowski and Gidron (2016, 10) who consider populism as "an attribute of" the political which is strategically used through a particular framework.
4 Müller (2016) highlights the essence of populism as being anti-pluralism. That certainly is present in populism, but it is insufficient to explain the directionality to which anti-pluralist rhetoric and policies are oriented. It also does not sufficiently separate populism from other "-isms" that are anti-pluralist.

5 Anti-populism is beyond the scope of the current chapter, but it is noteworthy that populist politics succeed most evidently when a shifting in the orientation of a polity occurs such that the primary polarization is seen as an antagonism between populist groups and their opponents.

6 To pose that populism can be understood as an ideology does not mean that it cannot be understood through strategic use of populist ideas or in public discourse or performances.

7 Though it is beyond the scope of this chapter, there is an important difference between scholars who think of institutions as organizational bodies with coercive power (the presidency, the media, congress) and those who think of them in more micro-behavioral terms ("…institutions are the way we behave given how we anticipate others will behave, based on how they and we behaved in the past" (Taylor 2020, 14).

8 Rovira Kaltwasser (2016) makes a similar point. As he considers populism a "thin-centered" ideology, it can easily be grafted onto other ideological and policy frameworks (e.g., nationalism) in different contexts. The argument in this chapter is a bit different in that the question is not grafting populism to another ideology, though that certainly occurs, but how populist leaders see the mode of realization in terms of populism via institutionality.

9 Many ideologies aim at political change and their political adherents seek to bring about such changes. The challenge is how change is to be brought about. It is worth noting this because so many aspects of populism (emphasis on the people, skepticism about institutions, demands for change, moralistic vision of political conflict, etc.) are not unique to populism and, on a theoretical level, are not necessarily anathema to democracy. Separating populism as an ideology from populist politics and then thinking of populist politics in terms of institutionality may help highlight unique characteristics of populist politics.

10 This chapter focuses on scholarly analysis of populism and it does not seek to definitively identify some politicians as populist or not. Given how contested the concept of populism is, it is not surprising that scholars vary considerably in their assessment of populism (see Hawkins 2011, as well as Panizza 2015 on President Pepe Mujica's playful self-assertion of populism).

11 Of course, the political behavior of any leader or group responds to a particular case and the way in which opposition has coalesced into an anti-populist coalition matter.

12 The criticism of the occupation of the state (the "deep state") by insiders generally extends to civil servants and others with partisan interests that may vary from left to right (though often disproportionately to one side) but all occupants of the "deep state" are conceived as being "entrenched" actors and people of a similar partisan direction or even party. The critics, on the other hand, tend to see themselves as marginalized outsiders whose voice is not heard or is being snuffed out.

13 There is an inconsistency in the idea that all politics, policies, and bodies are provisional and experimental and contingent upon popular will on an intellectual level with a more strategic, practical position of supporters that "there is no turning back." Thus, if/ when popular will appears to support a return to earlier policies or a rejection of new ones, the current and new ones are defended by the populist actor as legitimate and not thought of as experiments.

14 Anthony Pereira's comment on this question for this paper and throughout the conference was especially provocative.

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4

POPULISMS IN POWER

Plural and Ambiguous

Katerina Hatzikidi

Introduction

Until a few years ago, researchers across theoretical traditions and approaches to populism seemed to agree that there has been an inordinate focus on populist forces as contenders and not enough on what populists do in power. To address what they identified as a gap in the study of "the way in which actors and institutions cope with the coming into power of populist forces" Cristóbal Rovira Kaltwasser and Paul Taggart (2016, 201) organized a Special Issue on populists in government. Ioannis Andreadis and Yannis Stavrakakis (2017) similarly affirmed that populists in government have been very little studied compared to populists in opposition. With the election of populists around the world in recent years, however, studies proliferated, exploring the "populist challenge" from different standpoints.

In shifting the focus from populists' campaign behavior and discourse to their role in power, much of the research applied the same theoretical underpinnings (and often, normative assumptions) used to analyze populism in opposition. Treating populism as a largely monosemic phenomenon that is inimical to modern or liberal democracies, many of the studies fail to acknowledge the diversity of populist expressions across time and space or account for the specific conditions in which each may emerge and gain momentum.

In this chapter, I address some of these shortcomings by discussing three persistent (mis)conceptions about populism in power: (1) populism as an enemy of liberal democracy; (2) populism's transient nature; and (3) populism's "mainstreaming" and de-radicalization. Drawing on examples from the literature on populism, with an emphasis on Brazil under the presidency of Jair Bolsonaro, this comparative theoretical discussion aims to show the limitations of the abovementioned theorizations and how their uncritical application to *all* cases of populism in government risks obfuscating the phenomena we wish to analyze.

It is argued instead that the study of populism would gain analytical strength from being attentive to both commonalities and differences between the different case studies, as well as from exploring the ambiguities that inform populist political articulations. Recognizing populism as a plural, gradational, and ambiguous phenomenon is to better account for the heterogeneity and complexity of populist expressions without losing sight of their shared elements.

Populism is minimally defined here as a logic of political articulation that centers around the nodal point of "the people", creating an antagonistic frontier between "the people" and "the elites", "the system" or "the establishment". This definition draws from the so-called discursive approach (as elaborated by Ernesto Laclau and advanced by the Essex School) but also embraces the proposition, recently made by Pierre Ostiguy, Francisco Panizza, and Benjamin Moffitt, to bring the discursive approach together with the performative and sociocultural approaches, which they understand as complementary rather than mutually exclusive (Ostiguy et al. 2021, 1–9). For the purposes of this chapter, liberal democracy is understood as the outcome of the articulation of two distinct traditions – political liberalism and democracy – as discussed by Chantal Mouffe (2000, 18–20).

Populism as a Threat to Liberal Democracy

One of the most recurrent questions with regard to populism can be formulated as follows: "What does populism *do* to democracy?". A great many pundits have given a definitive answer to this question, arguing that populism is "a constant peril" (Müller 2016, 11) and a threat to liberal or modern democracies (Urbinati 2014; Mounk 2018a; Pappas 2019a). Whether tracing its roots in late-19th-century Russian and US American movements (Hofstadter 1964) or seeing it as a post-fascist response to leftist politics after the Second World War (Finchelstein 2014), central to the idea of populism as a threat to democracy is an understanding of the former as an inherently anti-pluralist political articulation, which thus threatens to impose majority rule on minorities, disrespecting liberal safeguards.

Often, political actors with illiberal ambitions or projects do not dare declare themselves nondemocrats or antidemocrats (Urbinati 2015, 479) but strive to "achieve at best a semblance of democracy" (Rovira Kaltwasser and Taggart 2016, 202) even as their acts contradict their self-image. Some of these political actors are populist. They may get fairly elected and, while in office, set in motion a process of democratic erosion from within which challenges the resilience of "democratic guardrails" and gradually debilitates democratic institutions (Levitsky and Ziblatt 2018). Some of the ways in which this gradual erosion may take place are the appointment of loyalists and family members to key positions of state bureaucracy and their dismissal when loyalty to the party or populist leader is not clearly shown; attacks against independent media and branches of state power, such as the legislative and judicial authorities; and the excessive use of discretionary power.

Such tactics have been observed in different populist administrations around the world and across time, from Argentina (e.g., Juan Perón) to the Philippines (Rodrigo Duterte) to the United States (Donald Trump) and El Salvador (Nayib Bukele). But do they comprise a "populist blueprint", "a well-scripted project of democratic illiberalism, which is common in all cases of ruling populism" (Pappas 2019a, 190).

Drawing on Fareed Zakaria's (1997) concept of "illiberal democracy", Yasha Mounk argues that populism appears to many as a solution to "undemocratic liberalism" and the increasing crisis of representation that is being observed around the world (Mounk 2018b, 100; Mudde and Rovira Kaltwasser 2018, 1670). Many modern liberal democracies are seen as failing "to translate popular preferences into public policy" (Mounk 2018b, 100), and populist movements promise to restore popular sovereignty, which is "seen to have been hollowed out as a consequence of globalization" (Gerbaudo and Screti 2017, 323). But for authors who adopt a so-called liberal approach, the suggestion that populism may be a corrective to the shortcomings of democracy is an "empirically groundless idea" (Pappas 2019b, 82) and

> even in cases in which the populists' democratic commitments are genuine, they still pose a danger to democracy. As Müller rightly points out, their *illiberal predilections* are deeply at odds with the maintenance of institutions, like free and fair elections, that stop them from running roughshod over the popular will once they become populist.
>
> *Mounk 2018a, 52; my emphasis*

Seeing populism as "the mirror image opposite, and a major foe, of contemporary liberal democracy" (Pappas 2019b, 70; see also Rosanvallon and Goldhammer 2008, 265), Pappas argues that *all* populists in power follow the same illiberal "blueprint". However, while the case studies he discusses crosscut regional and historical settings, it seems that they were cherry-picked to prove this point. Like other liberal approach proponents, Pappas omits any in-depth examination of divergences between inclusionary and exclusionary populisms (Mudde and Rovira Kaltwasser 2013) – whether along a left-right continuum or otherwise – and avoids discussing examples, such as SYRIZA or Podemos, that have been generally explored in the literature as cases of pluralist populism (Aslanidis and Rovira Kaltwasser 2016; Markou 2017; Siomos and Stavrakakis 2018). Furthermore, such authors usually make no analytical distinction between a populist narrative structure and performative style and the specific politico–ideological content which may inform them, ultimately considering populism as a sort of "total social fact" shaping every aspect of political and social life.[1]

The problem with this approach, in my view, is that it presupposes "illiberal predilections" and a plan to stay in power by illiberal means as part of the "populist blueprint" but makes little effort to consider the diversity of populist phenomena

or distinguish between common features and particularities of each case. Treating populism in the singular, such authors tend to see it as a monolithic phenomenon. While they may acknowledge distinct expressions of populism across time and space, they understand its illiberal or antidemocratic core to be rather transversal and immutable (see also the critique offered by Stavrakakis and Jäger 2017). In this view, populism and pluralism are cast as incompatible: by rallying "the people" against "the establishment" or "the elites", populism is understood to overemphasize the principle of popular sovereignty and majority rule at the expense of liberal safeguards such as individual and minority rights and the rule of law. Thus, populists must not (be let to) come to power, since if this happens, liberal democracy and its institutions will be under serious strain.

Analyzing the relationship between populism and democracy in the literature, Rovira Kaltwasser (2012) distinguishes between the "liberal", the "radical", and the "minimal" approaches. The first, as discussed already, tends to see populism as a pathology. The second would be used by "scholars who sympathize with the notion of radical democracy [and who] tend to think of populism as a positive force that strengthens political representations" (2012, 185). These authors are understood to follow the discursive approach. For Rovira Kaltwasser, the "minimal" approach, which can be based on either Mudde's ideational or Weyland's strategic definitions of populism, is "less normative" than the other two (2012, 192) and is "the only one that permits us to grasp that populism can be both a threat to and a corrective for democracy" (2012, 185).

While it is true to suggest that the liberal approach tends to see populism, in all its forms and shapes, as a pathology, it is important to note that the "radical" approach does *not* see populism as a priori "good" for (liberal) democracy. Scholars following the discursive approach may understand populism as inherent to democracy and even as an ideal-type expression of the political itself (Laclau 2005, 225), but that does not mean that they assume an unproblematic relationship with liberal democracy (Panizza 2005, 29) nor that populism may only have positive effects on modern democracies (Stavrakakis 2014, 514). Indeed, they do not make "assumptions about the specific contents and the ideological or programmatic features of populist actors" (Katsambekis 2022, 10) but try to understand the ways in which "different demands and corresponding social groups can be discursively linked" (ibid., 13). Moreover, the ideational approach is not itself without normative assumptions: its understanding of the construction of "the people" as homogeneous casts populism as essentially anti-pluralist even before exploring its effects on a given democratic context (Vergara 2020). Such an approach may distort the analysis of a given populist expression. Katsambekis (2022) notes, for example, how in 2015 Cas Mudde had dismissed SYRIZA's commitment to pluralism and protection of minority rights – elements that had informed the party's agenda from the beginning and which guided its policies while in office (see also Mudde 2017). Katsambekis then rightly suggests that the insistence of inscribing a conceptualization of populism as anti-pluralism to *all* cases of populism can

lead to "the imposition of theory-driven assumptions upon data-driven findings" (2022, 16).

Populism's Transient Nature

In his seminal work on populism, Taggart (2000) proposed a "self-limiting quality" as one of the main themes of populism as an ideal type. Taggart uses this term to describe the supposed inherent difficulty populism has to sustain itself in the long term. Seeing populist distrust of professional politicians, mainstream media, and democratic institutions as a core element of its "ideology of immediacy" (Brubaker 2017, 365; Urbinati 2015), its appeal to constituencies is understood to rely largely on populists' "unusualness" vis-à-vis the political establishment (Taggart 2004, 276). For Taggart and others (e.g., Mudde 2004), it is precisely in this constitutive element of populism where its self-limiting quality is revealed: once in power, populists can no longer convincingly present themselves as political "outsiders" and "as they become institutionalized into politics, they inevitably lose a major part of their popular appeal" (ibid.). Hence, because of its "ambivalence about politics" and its anti-institutional stance (Taggart 2000, 4), populism, so the argument goes, will likely be discontinuous or temporary.

Yet the assertion about populism's self-limiting quality does not tell us much about the ways and celerity in which its supposed decreasing appeal plays out in relation to actual post-electoral circumstances. What empirical factors may influence constituencies' shifting stance toward a populist government and in what ways, if at all, do they differ from similar shifts affecting non-populist governments? Is transience a product of, or dependent on, popular disillusionment vis-à-vis the difference a populist administration was expected to make (hence of disillusionment with regard to systemic change)? Is "unusualness" populism's only major appeal so that as soon as a populist party is institutionalized it automatically loses its most important asset? Are said limitations equally relevant when populists' performance in office is positively evaluated among segments of the population? The sheer diversity of populist phenomena conduces us to think that answers to these questions need to be context specific. The same, I wish to argue in what follows, is true for populism's episodic and transient nature. While constitutive characteristics of populism may ultimately become limiting, this needs to be determined on a case-by-case basis and not be established in advance, or as a general rule, for all populist manifestations.

What is important to consider, when examining populism's relationship with institutions and the political establishment, is a disjuncture that frequently occurs between populism's "anti-system" rhetoric when in opposition and its ambiguous relationship with "the establishment" when in power. Populism's anti-system imperative is a resourceful rhetorical mechanism that is able to mobilize constituencies around radical political and social change. But while it may continue to be vehemently communicated even after populists take office, it usually acquires

multivalent connotations and becomes embedded in a complex relationship between power brokers and the now institutionalized anti-establishment forces. In what follows, I will critically reflect on populism's episodic nature, examining the possibility of the populist momentum being successfully kept even after its institutionalization. Ambiguity is key to understanding how, for example, in the eyes of followers, a populist government may not be considered part of "the establishment" even if it holds office.

Identifying and analyzing the ways in which populists in government strive to maintain momentum is essential to assessing variations in their popular appeal. The election of populists is often the result of a popular reaction to a discursively performed (sense of) crisis (Moffitt 2015) and, consequently, of a wish to reestablish order (Laclau 2001; 2005). For this purpose, populists often "earn a mandate to bury the political establishment" only to reconstruct it thereafter and "'refound' the political order" (Levitsky and Loxton 2012, 163). "We need to destruct many things, undo many things, to begin constructing later", affirmed the Brazilian President in a formal dinner in Washington DC, in March 2019, after thanking the conservative author and conspiracy theorist Olavo de Carvalho for his influence on the ideological revolution underway (Revista Piauí 2020). However, as Antonio Gramsci observed, destruction is not as easy as it may initially appear: "indeed, it is as difficult as creation" (2007, 25). Destruction is a process that requires time and, more than that, it is an action that is bound to encounter resistance. For Bolsonaro, and many populist leaders across the political spectrum, resistance to their government is proof of "the system's" sway and determination to muffle, restrain, and ultimately impede the populists' plans to reinstate popular sovereignty and restore order. Until "the system" is defeated and substituted by the "anti-systemic" forces in power, populists will continue to denounce the ills that ravage politics and the powerful adversaries that "do not let them" govern.

In what follows, I look at a discursive scheme employed by President Bolsonaro that has helped him maintain much of his populist appeal during his term in office. According to this narrative structure, I identify and heuristically call "David vs. Goliath", earnest government efforts to carry out changes are met with great resistance either by the powerful establishment and/or evil enemies who work against the far-right populist leader. This discursive scheme allows for a shifting enemy discourse, flexibly adjusting the populist antagonistic frontier to maintain relevance in changing political circumstances. The discussion does not imply that such a narrative scheme is a necessary feature of *all* populisms in office. It is suggested, however, that similar tropes may also be at work in other populist manifestations. It serves, therefore, as an indication of the limits of populism's transient nature.

Despite his long-standing career as a rank-and-file congressman, Jair Bolsonaro successfully presented himself as an "anti-system" presidential candidate in Brazil in 2018. He managed to dissociate himself from the tainted image of a politician at a time when the country was shaken and vexed by the revelation of a series

of corruption scandals by emphasizing his military past and inviting the reserve Army General, Hamilton Mourão, on his ticket, effectively repositioning himself outside the political establishment. With a messianic far-right populist discourse that rallied Brazil's so-called "righteous citizens" (*cidadãos de bem*) against the morally and politically corrupt elites, and with the promise to break with the evils of backroom political operations, Bolsonaro took many by surprise by winning the 2018 presidential elections (Hatzikidi and Dullo 2021).

Jair Bolsonaro's government ~~has shown~~ signs of sustainable acceptance throughout its ~~first~~ term, despite facing serious challenges such as economic and environmental crises and becoming one of the world's epicenters of the COVID-19 pandemic. Furthermore, prior to being elected, Bolsonaro promised although did not quite deliver, a "smaller state", which would result from large-scale privatizations and the shrinking of state bureaucracy, including a reduction of ministries. Despite the many shortcomings, however, his popularity continued to be sustained among roughly one-third of the population (Nobre 2020a, 17–19) for much of his ~~first~~ term, and often expanded beyond his loyal group of supporters. What may explain the maintenance of momentum – particularly with his core electoral base – even in the face of inability to keep electoral promises and shake the political establishment?

In one of the first studies aimed at exploring populists' influence once in power, Albertazzi and McDonnell (2015), discussing populist parties in government in Italy and Switzerland, showed that they tended *not* to lose credibility when in office. Another study drawing on data collected during the SYRIZA-ANEL coalition government in Greece shows that populists' resilience in power "does not exclusively rely on the materialization of promises" and their appeal does not necessarily decrease when electoral promises cannot be kept (Andreadis and Stavrakakis 2017, 504). What the researchers observed instead is that:

> what becomes more important than keeping the promises is *being seen as trying hard to implement them* (no matter whether the attempt itself has been successful) […] Relying on the representation of salient dichotomies and on the identity/difference dialectic, populist political discourse may be in a better position to deal with policy failure when this can be attributed to the power of a formidable adversary at the transnational level and when it can still attract the anti-populist wrath of internal party antagonists, sustaining thus in the eyes of the voters a continuity between populism in opposition and populism in power.
>
> *ibid., my emphasis*

Andreadis and Stavrakakis's findings highlight the importance of the "David vs. Goliath" discursive (understood here to include speech, bodily behavior, and style) metaphor for populism's resilience in government. The case of SYRIZA is paradigmatic, for it "attempted to convey the idea that it was *a party in office but not*

in power; a government that fought for the people's demands against the political and economic elites that continued to have the real power" (Katsambekis 2019, 36; cited in Markou 2021, 182; my emphasis). In the Brazilian case under discussion, the "formidable adversary" need not be exclusively transnational but can be domestic as well, and the opposition is predominantly interpellated around antiauthoritarianism, rather than anti-populism. Nevertheless, the discursive logic is largely the same, expressing populists' tireless efforts to bring about change against all odds.

Indeed, several transnational menaces have been weaved into Bolsonaro's discourse throughout his time in office, most eminently with regard to his virulent anti-Communism (Hatzikidi forthcoming). Countries like Cuba, Venezuela, and even Argentina, are steady regional "red scares" and, more recently, China was added to the countries under attack due to the COVID-19 outbreak (Bolsonaro, like Trump, called the coronavirus "Chinese virus" and the vaccines developed Chinese pharmaceutical companies "*vachina*", in a pun with the Portuguese word for vaccine "*vacina*"). But the powerful enemies are equally found within: the "communist penetration" and the duty to expunge it from Brazilian soil, the corrupt political establishment, the "leftist cultural hegemony" in places of culture and education, atheists, environmentalists, and all those defending the preservation of indigenous and other protected territories from illegal loggers and miners and from their conversion into pastureland, to mention but a few. More generally, anyone who questions or objects to Bolsonaro's "plan of destruction" is cast as an enemy of the people and the nation.

During the pandemic, this became evident when Bolsonaro declared war on mayors and state governors for implementing or simply recommending social distancing measures. Calling Brazilians to flout any restrictions on their right to free movement and work, Bolsonaro blamed local administrations for the economic crisis that would ensue (Hatzikidi 2020). At the same time, questioning the authority of high courts, he repeatedly threatened to use "his army" to restore "democracy", against the "dictatorial" directives of mayors and governors, and implement the will of the people. In his effort to forge an image of a humble and honest "soldier" (and, occasionally, "martyr") working hard for his country and its people, Bolsonaro is quick to blame others and present himself as either the winner over, or a victim of persecution by, powerful and sinister institutions and stakeholders, and hence never take responsibility over a loss, failure, or neglect. As Marcos Nobre (2020b) observed: "Bolsonaro always acts as if he is permanently cornered, although he is the president" (2020b, 170).

By opening up the semantic field of the "enemy", Bolsonaro's populist discourse continuously adjusts its antagonistic frontier to changing political circumstances and thus strives to preserve its appeal. There is always a threat to the people and the nation, but who or what that threat depends on the conjuncture. This chameleonic approach to the "enemy" signifier bears similarities to Laclau's (2005) notion of the "floating signifier", or the association of multiple meanings to the

same term. The "enemy" in Bolsonaro's case becomes associated with multiple and often shifting categories ranging from "leftist psychos" (*esquerdopatas*), "criminals" (*bandidos*), vaccination enthusiasts to anyone who dissents from the government's official line.

As different analyses of populists in power have shown, populist discourse in office commonly shifts its target or changes the intensity of its accusations (Levitsky and Loxton 2012, 170; Markou 2021). These observations concur with the understandings of populism as "shrouded in imprecision" (Taggart 2004, 274). As Laclau (2005) has remarked:

> the language of a populist discourse – whether of left or right – is always imprecise and fluctuating: not because of any cognitive failure, but because it tries to operate performatively within a social reality which is to a large extent heterogeneous and fluctuating. I see this moment of vagueness and imprecision – which, it should be clear, does not have any pejorative connotation for me – as an essential component of any populist operation.
>
> *2005: 118*

Populism's imprecision and shifting (enemy) discourse as both a necessary adaptation to changing social realities and a form of maintaining its appeal bring us to a second point about populism's resilience in power: negotiations with "the enemy". Like other populists, when he first took office, Alberto Fujimori was complaining that institutional powers "were actively blocking his efforts to carry out the public will and resolve Peru's economic and security crises" (Levitsky and Loxton 2012, 170). The *autogolpe* (presidential coup), which he justified in the name of "true" democracy (ibid., 171), was for Fujimori the only way out from a deadlock in which his government, and by extension, the people, and the country as a whole, were found. And while for Levitsky and Loxton (2012) the coup demonstrates the "elective affinity between populism and competitive authoritarianism" (2012, 181) in Latin America's "fragile" democracies, many populist leaders in government choose instead to negotiate with key powerholders from the political, the financial, and the military establishment, among others. Although one of Bolsonaro's electoral promises was to end the "old politics" of "give-and-take", after just over a year in office, and threatened by the possibility of an impeachment process, he quickly resorted to the backroom deals he vehemently denounced during his campaign. The concessions to members of the "*Centrão*", a large self-serving cluster of congressmen from right and center-right parties known for lending support to any incumbent government – independently of its political orientation – in exchange for strategic positions and financial gain, were presented to the government's "ideological base" as a strategic sacrifice Bolsonaro had to make in order to stay in power by satiating the demands of powerful stakeholders who may otherwise hinder the government's plans for radical transformation.

Contrary to Levitsky and Loxton (2012) who argue that because populists are "elected on an anti-establishment appeal", once in office they cannot negotiate or share power with established parties and other institutional actors since "such a move would constitute a betrayal of their mandate, which could be politically costly" (2012, 163), the many examples of populist parties joining governing coalitions prove that negotiations can and do take place, although they may often be silenced or justified for damage control. Furthermore, the Brazilian case under discussion demonstrates how a not-so-tacit alliance with key powerholders of the political establishment par excellence may be used as another example of the "David vs. Goliath" narrative scheme, effectively showing the government willing to negotiate even with its (former, or in principle) enemies for the benefit of the people. Shifting the category of the enemy is also essential to convert a former enemy into a precious new friend, or an old friend into a dangerous enemy, following changing political circumstances. By "domesticating" the enemy, the populist administration keeps threats at bay and remains in power to carry out the will of the people.

Taming Populism

At odds with the image of populists in power "domesticating" or "taming" their enemies and eroding democratic institutions from within is a third widespread assumption about populism: the "inclusion-moderation" thesis (previously applied mostly regarding political Islam, see Schwedler 2011). According to this hypothesis, populists in power tend to become more moderate – that is, less hostile to liberal democratic institutions – as a result of their participation in pluralist political processes. The moderating effects of inclusion would induce populists in office to tone down their incendiary Manichean discourse and adopt a rather conciliatory tone. This process of "moving into the mainstream", or becoming more similar to established parties, is thought to increase populists' chances of political survival (Akkerman et al. 2016, 14–17).

Different explanations are given to support this thesis, such as a need to appeal to the "median voter" and expand the electoral base (when seeking office and once in power), as well as the supposed de-radicalization effect of coalition governments. As will be discussed next, however, several empirical studies show a wide array of populist behavior with regard to moderation and radicalization, questioning the assumptions of the inclusion-moderation hypothesis. While some indeed tone down their antagonistic discourse and seek consensus (see Markou 2021, 186), others double down on divisive issues maintaining their populist style, while many adopt a more ambiguous approach vis-à-vis their relationship with institutions and the political establishment.

Analyzing the political communication of the Lega Nord party in Italy between 2001 and 2005, for example, Albertazzi and McDonnell (2005) claim that the regionalist far-right populist party managed to present itself as simultaneously

inside and outside the governing coalition with Silvio Berlusconi. By carefully choosing their "friends" and "enemies" from inside the government, the party "successfully walked the populist tightrope of being seen to have 'one foot in and one foot out' of government" (2005, 953), thus keeping their base engaged. But it is not just populists in government coalitions who seek to simultaneously communicate an image of uncompromising defenders of the people's will and rein back their radicalism. In a comparative study of incumbent pro-Islam populist parties in Turkey and Morocco (AKP and PJD respectively, both known as the Justice and Development Party), Kirdis and Drhimeur (2016) argue that a similar ambiguity is at play. Both parties have sought to consolidate their electoral appeal by combining a moderate understanding of political Islam (thus engaging with broad constituencies) with a more antagonistic populist discourse that claims to restore popular sovereignty of the marginalized religious majority (thus appealing to their core constituency) (2016, 602–603).

In the run-up to the 2018 presidential elections in Brazil, Jair Bolsonaro reached out to those segments of the population who remained undecided. To win them over, he partially tried to tone down his radical antidemocratic, homophobic, racist, and sexist views in a bid to convince as large a number of people as possible that he would be able to live up to the role's expectations.[2] Importantly, he allied himself with key figures that were largely seen as "guarantors" of moderation, most notably Sergio Moro and Paulo Guedes, who became Minister of Justice and Minister of the Economy, respectively. Moro renounced his position as a federal judge and joined Bolsonaro's government after gaining unprecedented popularity, and even "heroic" dimensions, through his involvement in the Car Wash (Lava Jato) corruption investigations which culminated in the imprisonment of former President Luiz Inácio Lula da Silva. Guedes, an ultraliberal economist and investment banker acted as the financial market's ambassador in Bolsonaro's campaign and future administration, conferring on him the support of capital holders most concerned with the government's economic policies.

Guedes appeared particularly confident that he could steer Bolsonaro (who, as a congressman tended to vote in favor of statist projects) toward the direction he wanted. In fact, he declared himself able to "tame" the "crude, coarse guy" (Gaspar 2018, online). However, seeing Guedes's increasing isolation in the Bolsonaro administration and his apparent inability to implement many of the policies he proposed (Carvalho 2020), one could say that it is ultimately Bolsonaro who "tamed" Guedes. Moro, on the other hand, who believed that he had been given carte blanche to preside over crime and corruption investigations, resigned in April 2020 accusing Bolsonaro of wanting to interfere with ongoing investigations and have access to secret intelligence documents by assigning a confidante to head the Federal Police.

Similar to his electoral befriending of alleged moderation guarantors, Bolsonaro's negotiations with members of the *Centrão*, mentioned in the previous section, are also seen by some as contributing toward the president's de-radicalization.

Among the many concessions made in exchange for loyal voting and support in the two houses of Congress, the government took some steps back vis-à-vis the most radical or "ideological" items on its agenda. The appointment of Supreme Court Justice Kassio Nunes Marques, for example, placated those who feared an extremist nomination but deeply frustrated the government's core constituency which expected Bolsonaro to make good his promise to appoint someone "terribly evangelical". Ernesto Araújo, the Minister of Foreign Affairs who openly embraced conspiracy theories and thwarted diplomatic relationships with China, was forced to resign in March 2021, allegedly also following pressure from the *Centrão* and moderate segments of the government.

While it is undeniable that some moderating effect results from negotiations and from pressure to broaden the government's appeal beyond its loyal electoral base, far from "reining in" the president, moderation goes hand-in-hand with continuous appeals to the government's radical "ideological" base. At the same time, efforts are made to present a de-radicalized profile, Bolsonaro, and members of his administration, ceaselessly work to strengthen their commitment to their core constituency. For example, a few months after appointing the "moderate" Nunes Marques, Bolsonaro appointed André Mendonça, an evangelical pastor, to the Federal Supreme Court in a direct nod to his core constituency.

Questioning the "incumbency challenge", Daniel Hegedüs (2019) analyzed Hungarian Prime Minister Victor Orbán's speeches during the 2010–2018 period in government. His findings indicate that not only did the populist radical right politician not moderate his discourse in office, but, on the contrary, by continuously tapping into a narrative of crisis, he even radicalized his "us" versus "them" dichotomies (2019, 423). At the same time, Hegedüs observed that a discursive shift occurred with regard to the main target of anti-elitism, largely substituting domestic with European elites. Comparing official party discourse from different populist parties in governing coalitions in Europe and New Zealand, Schwörer (2022) similarly contends that elected "populists do not decrease the degree of anti-elite and people-centered messages … but rather change the type of elites they attack and the antagonist groups they juxtapose" (2022, 1).

We see, therefore, that populists in office do not necessarily become more moderate but, on the contrary, may even radicalize their antagonistic politics. Instead of their "mainstreaming", as inclusion-moderation theory would have it, it would seem then that what is being mainstreamed instead is populist discourse. Hence, far from seeing moderation efforts exclusively as signs of a constitutive change resulting from the populists' inclusion into pluralistic political processes, we might get a more accurate picture of populists' behavior in power by paying equal attention to the way they appeal to their core constituencies. The concept of ambiguity, as discussed earlier and exemplified in the cases mentioned above, can be a useful guide to mapping the complex and often contradictory discursive and performative mechanisms populists employ to stay relevant and survive politically.

Concluding Remarks. Populisms in Power: A Plural Phenomenon

In this chapter, I explored possible limitations of three widespread ideas about populism, namely that it is inherently "bad" for liberal democracy, always short-lived, and more moderate in power. Drawing on examples from Brazil under Bolsonaro, alongside case studies from the literature on populism, I pointed out some of the analytical and normative biases involved when adopting preconceived understandings about populism. An aim of this theoretical discussion was to point toward the need to recognize both similarities and differences between the manifold populist manifestations across time and space. Considering populism as a largely monolithic political phenomenon prevents us not only from seeing the great diversity and gradational nature of populism but also from accurately recognizing and understanding what the different populist expressions have in common. Instead, I suggest that applying a minimal definition of populism (with two main discursive criteria: "people-centrism" and "anti-elitism", as proposed by the Essex School) and heuristically approaching the distinctive characteristics of the case study at hand, research on populism will be able to better account for the plurality of the phenomenon.

Thinking about the relationship between populism and democracy, many authors tend to agree that the two are more productively understood in conjunction than in isolation (Canovan 1999; Arditi 2004; Rovira Kaltwasser et al. 2017). Building on Paulina Ochoa Espejo's (2015) discussion of the uncritical framing of democracy and populism as discrete phenomena, Moffitt (2016) proposes an "equivocal" view that "consider[s] the democratic and anti-democratic tendencies *within* populism" (2016, 150, emphasis in the original), the latter being conceptualized as a political style. For Moffitt, populism has strong democratic and antidemocratic tendencies that can manifest concurrently (2016, 145) and it is ultimately impossible to predetermine how democratic a populist political project may turn out to be (2016, 149). Not far from the notion of ambiguity discussed in this chapter, Moffitt's equivocal lens encompasses tensions observed in different populist phenomena without making assumptions about each of them, providing therefore a useful approach to the complex relationship between populism and democracy.

Similar ambiguities are at play when thinking about whether populism is a lasting phenomenon or when we consider whether it becomes less radical when in government. Indeed, if the discussion of the three widespread (mis)conceptions about populism has been able to show anything, this is that populism is best understood in the plural, not in the singular. Populists are first and foremost distinguished by their appeal to "the people" and by discursively mobilizing the people against "the elites", "the system", or "the establishment". These are elements that all populisms share. Their relationships to liberal democracy, however, or their ability to maintain momentum and stay in power, cannot be established in advance for *all* populisms.

Setting off from a minimal definition, researchers can then carve out the specificities of a given populist phenomenon by paying attention to the politico-ideological elements that structure and inform populist discourse. Broadly speaking, independently of whether one adopts a discursive, performative, socio-cultural, or ideational approach, it is important to keep in mind that "populism tells us very little about the democratic 'content' of any political project" (Moffitt 2016, 133). Or, in the words of de Cleen and Stavrakakis (2019):

> a populist politics is never exhausted by its populist dimension. To under-stand a particular populist politics we need to study the articulation between the populist dimension and the other dimensions of that politics: nationalist, often, but also socialist, conservative, authoritarian, and so on, rather than subsuming these dimensions under populism.
>
> *2019, 318*

Furthermore, and beyond examining what populisms have in common, the "key", argue Molyneux and Osborne (2017), is to examine how they play out at a pol-itical level (2017, 17).

Besides the necessity to explore the "other dimensions" of populist politics, or the politico-ideological project populism comes with, it is also important to recog-nize that populism acquires different degrees of intensity and it is not a phenom-enon that either *is* or *isn't* present. As Aslanidis (2017) has argued "the persistent use of populism as a dichotomous term, despite the battery of empirical work that proves its graded nature" (2017, 281), informs another misconception about popu-lism that, in turn, fuels anti-populism. To be able to comprehend a given populist project in its own right, we need to steer clear of normative assumptions about the reasons for its emergence, its behavior, and its evolution. And we also need to pay attention to anti-populist discourse, which acts as "a mirror image of the populist strategy" (Mudde and Rovira Kaltwasser 2018, 1684; Stavrakakis 2014), often used by mainstream political forces to discredit and dismiss their legitimate opponents (Aslanidis 2017, 283). The degree of populism's "radicalness", for example, is also a matter of how threatening non-populists judge the populist forces to be, and of how virulent their (often preconstrued) anti-populism is.

While form informs content and the two cannot be completely dissociated (Ostiguy et al. 2021), to identify and analyze a specific populist manifestation while avoiding preconstrued assumptions, it is useful to think of populism's "empty heart" (Taggart 2000) or its "empty shell, which can be filled by the most disparate political contents" (Traverso 2019, 16). In this sense, we may say that while populism provides a discursive and performative mechanism of polit-ical articulation, it is not there where we should look for the ideological drives that inform specific government policies and actions. These are often guided by ideas and political projects that precede their populist discursive articulation. To return to the Brazilian example discussed in this chapter, while Bolsonaro's mili-tarism and authoritarian inclinations are long-standing, his populism is arguably

circumstantial and opportunistic (Ichimaru and Cardoso 2020). Tuning in to the particular politico-ideological components of a given populist project will allow us not only to describe a political phenomenon for what it is and not for what we assume it to be, but it will also enable us to estimate how each populism may turn out to be in power.

Acknowledgments

Notes

1 I am here using the notion of "total social fact" drawing on Marcel Mauss's description of "total social phenomena" (1954, 3–4), in which "all kinds of institutions are given expression at one and the same time – religious, juridical, and moral", only to emphasize the idea that populism is often endowed with more attributes than a minimal definition could possibly allow for.
2 N.E.: Notably, in the run-up to the 2022 elections, we can observe the same effort to adopt a more moderate narrative on the part of Bolsonaro campaign to grasp a bigger electorate, particularly to win over a greater share of female votes.

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PART II
Political Economy

5
ECONOMIC GLOBALIZATION AND POPULISM IN LATIN AMERICA AND BEYOND

Paula Rettl

Introduction

Both populism and economic globalization have been on the rise in the last decades, motivating increasing scholarly attention to the phenomena and their relationship (see Rodrik 2021 for a recent review). However, the relationship between populism and economic globalization is not straightforward for four main reasons. First, economic globalization is multidimensional. Second, populism can be defined in different ways, and each definition implies a different relation with economic globalization (and, more generally, with the economy). Third, there is an ongoing debate in the literature about why and how economic globalization increases support for populist leaders. Lastly, the consequences of populism for economic globalization are understudied (Funke, Schularick, and Trebesch 2020).

In what follows, I discuss how previous research informs our understanding of the relationship between economic globalization and populism and the puzzles that remain to be solved. In the following section, I present the complexity of economic globalization, the related measures, and trends. I subsequently discuss three different definitions of populism and how they relate to economic global-ization and, more generally, the economy. I then examine studies on the effects of economic globalization on populism and the possible channels. The subsequent section considers the contrary relationship, that is, the impact of populism on economic globalization. The final section concludes with some reflections and avenues for future research.

Dimensions of Economic Globalization

Globalization is a complex process of economic, political, social, and cultural integration between countries. As flows of goods, capital, people, and information become larger and more frequent and trans- and supranational regulations become more numerous and binding, countries become more interdependent, and national borders are gradually eroded (Mcgrew 2020; Norris 2003). Furthermore, the many types of globalization are not necessarily independent processes. For example, increasing the movements of goods can lead to more supranational regulation through the World Trade Organization (WTO) or the European Union (EU). That being said, this chapter focuses on the economic dimensions of globalization.[1]

Economic globalization refers to cross-border trade and financial flows. It can be measured both as actual flows – for example, trade as a percentage of gross domestic product (GDP) – or as regulations that facilitate or restrict such flows, such as import tariffs. Previous work in economics shows that both actual flows (i.e., *de facto* economic globalization) and regulations (i.e., *de jure* economic globalization) matter for economic growth, employment rates, and wages (Autor, Dorn, and Hanson 2016; Choi et al. 2020; Dix-Carneiro 2014; McLaren 2017). Nevertheless, *de facto* and *de jure* globalization may impact a country's economic condition differently (Gygli et al. 2019).

The most comprehensive and widely used economic globalization index in the literature is the KOF economic globalization index (Gygli et al. 2019). In its most recent version, it allows for comparing over 180 countries between 1970 and 2018. It also breaks down economic globalization as trade globalization and financial globalization and each of these subdimensions in *de facto* and *de jure*. Table 5.1 outlines the variables used to measure each type of economic globalization.[2]

Most of the literature on populism focuses on Europe, the United States, and Latin America. Accordingly, I show in Figures 5.1 and 5.2 the evolution of *de facto* and *de jure* trade and financial globalization in these regions, as well as the average

TABLE 5.1 Trade and Financial Globalization

	De facto	*De jure*
Trade	Trade in goods, trade in services, trade partner diversity.	Trade regulations, trade taxes, tariffs, trade agreements.
Financial	Foreign direct investment, portfolio investment, international debt, international reserves, international income payments.	Investment restrictions, capital account openness, international investment agreements.

Note: Description of the variables included in the several dimensions of the KOF Globalization Index (Gygli et al. 2019).
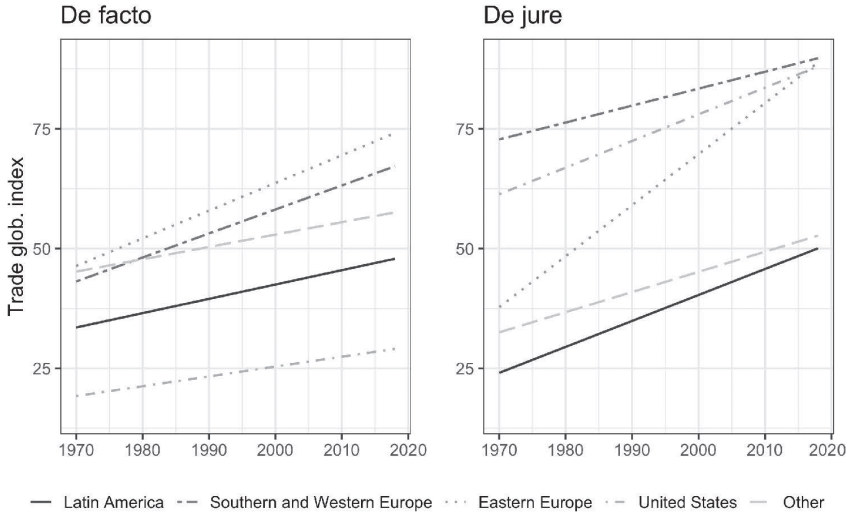
FIGURE 5.1 Trade Globalization
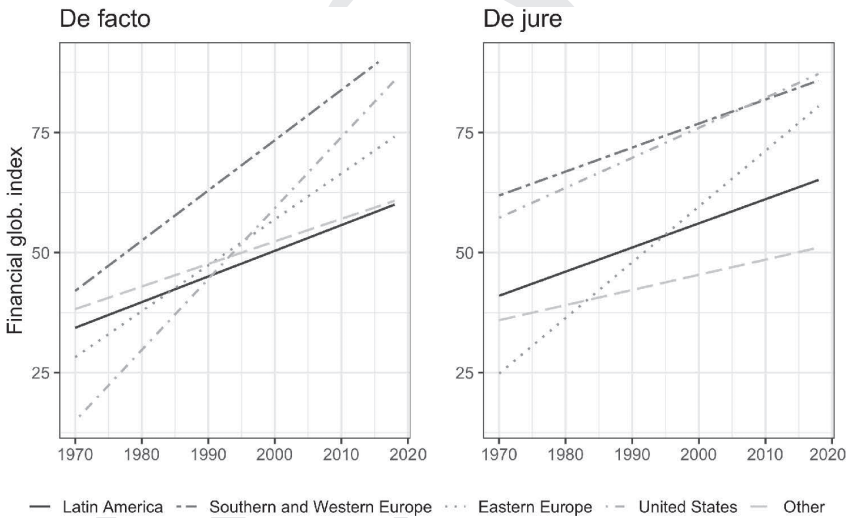
FIGURE 5.2 Financial Globalization

for all other countries between 1970 and 2018. Figure 5.1 shows that *de facto* and, especially, *de jure* trade globalization rose significantly in the period. This trend is particularly strong in Eastern Europe. The United States has the starkest contrast between *de facto* and *de jure* trade globalization, as its level of *de facto* trade globalization is much lower than *de jure*. Moreover, Latin America has low *de facto* and *de jure* trade globalization compared to Southern and Western Europe, Eastern Europe, and the rest of the world (i.e., the "other" category).

TABLE 5.2 Economic Globalization Correlation Matrix

	Trade (de facto)	Trade (de jure)	Financial (de facto)	Financial (de jure)
Trade (*de facto*)	1.0000			
Trade (*de jure*)	0.3041	1.0000		
Financial (*de facto*)	0.6146	0.5404	1.0000	
Financial (*de jure*)	0.2335	0.6262	0.5367	1.0000

Note: Pairwise correlation coefficients of different dimensions of the KOF Globalization Index (Gygli et al., 2019).

When it comes to financial globalization, similar patterns emerge. Namely, all regions went through increasing financial *de facto* and *de jure* integration between 1970 and 2018. Furthermore, *de facto* and *de jure* globalization do not always go hand in hand. For example, while the United States has similar *de jure* financial globalization levels as the European average, it has significantly lower *de facto* financial globalization. Turning to Latin America, we realize that the region has on average lower levels of *de jure* and *de facto* financial globalization than Europe. As compared to the rest of the world, Latin America is below average in terms of *de facto* financial globalization and above average in terms of *de jure* financial globalization.

Table 5.2 shows the correlation matrix between the different types of economic globalization. The table shows a relatively high correlation between *de facto* trade and financial globalization (0.61). Similarly, *de jure* trade and financial globalization also have a relatively high correlation (0.63). However, the correlation between *de facto* and *de jure* trade globalization is relatively low (0.30), while for *de facto* and *de jure* financial globalization, the correlation is stronger (0.54).

Definitions of Populism and Their Relationship with the Economy

Populism can be defined in different ways. As a result, each definition yields a different relationship with economic globalization and, more generally, the economy. In this section, I discuss how economic globalization and, more generally, the economy relate to three definitions of populism: macroeconomic populism (Dornbusch and Edwards 1991; Rodrik 2018), populism as a strategy (Weyland 2001; 2017), and populism as a thin ideology (Mudde 2004; Mudde and Rovira Kaltwasser 2017; 2018).

Macroeconomic Populism

The definition of populism more closely related to the economy is defined by Dornbusch and Edwards (1991). Inspired by the economic developments in Latin

America in the 1990s, the authors defined populism as a set of policies aiming at income redistribution that violate "orthodox" economic principles, such as respecting budget constraints, avoiding inflation, and promoting efficiency. In short, this understanding of populism – also called "macroeconomic populism" – is based on the idea that electoral incentives lead to shortsighted economic policies, which in the long run cause economic crises that hurt the poor particularly badly (Rodrik 2018).

According to this point of view, examples of "bad economic policies" implemented by macroeconomic populists are expanding the public sector and printing money to finance such expansion (Edwards 2019). Following Dornbusch and Edwards (1991), this set of economic policies prompts growth and welfare gains in the short run but are unsustainable and, in the long run, end up creating a range of problems, such as high inflation, lack of foreign exchange, accumulation of debt and capital flight (Edwards 2019).

The relationship between this understanding of populism and economic globalization is twofold. On the one hand, policies classified as part of macroeconomic populism can curtail economic globalization (Funke, Schularick, and Trebesch 2020; Rodrik 2018). On the other, part of what makes macroeconomic populism harm economic output and increase poverty, in the long run, are external constraints linked to economic globalization. More specifically, the level and the type of integration of a country in the world economy define the external constraints that a government faces when implementing economic policy (Shambaugh 2004; Stallings 1992). For example, increasing public spending at the expense of a balanced public budget might have different consequences in the United States and Latin American countries because they borrow money in international markets at different costs.

To illustrate how macroeconomic populism is not necessarily bad economics, Rodrik (2018) evokes the example of President Franklin D. Roosevelt (FDR) and the New Deal.[3] According to this author, once in power, FDR did not respect all the orthodox principles of the economy, such as maintaining a balanced budget and keeping taxes low. For instance, FDR introduced a tax on wealth (the 1935 Revenue Act), provided social security to the elderly and the unemployed (the Social Security Act), and took the United States off the Gold Standard in 1933, which ultimately led to the depreciation of the dollar and a decrease of US interest rates. Rodrik (2018) argues that the New Deal did not lead to economic collapse and, importantly, allowed American democracy to survive the Great Depression.

Moreover, under certain circumstances, economic policies considered to be orthodox can also be unsustainable in the long run. For instance, Rodrik (2018) points out that one solution to contain macroeconomic populism is to delegate part of economic policy domains to autonomous and technocratic agencies, which are not submitted to the short-termism of elected politicians. These technocratic agencies can be national – such as independent central banks – or international, such as the International Monetary Fund. However, autonomous agencies, which are insulated from the need to gain popular support, are vulnerable to being

captured by special interests. One example is when independent central banks try to contain inflation by raising interest rates, hurting job creation and economic growth (Rodrik 2018).

Furthermore, a growing body of research documents the detrimental implications of import competition and trade liberalization to wages, lifetime income, and employment levels (Autor, Dorn, and Hanson 2016; Dix-Carneiro 2014; McLaren 2017). Consequently, free trade combined with austerity can cause dissatisfaction and grievances in specific sectors of the electorate, eventually causing a backlash against globalization (Colantone and Stanig 2018b; 2018a; Margalit 2012; see Walter 2021 for a review).

What is more, some politicians that have been identified as populists – such as Carlos Menem, Fernando Collor, and Alberto Fujimori – have enacted orthodox economic policies in close consultation with the International Monetary Fund and the World Bank. Furthermore, Latin American leaders on the left that are identified as populists, such as Evo Morales, respected some orthodox principles, such as budget discipline (Weyland 1996; 2017).

Therefore, defining populism in terms of unsustainable economic policy is inaccurate for two main reasons. First, whether a set of economic policies is sustainable or responsible is context-dependent and, at least to a certain extent, a normative judgment (Rovira Kaltwasser 2019). Second, politicians identified as populists have enacted very different economic policies, showing that economic policies are not a good candidate to define populism. In fact, populism is rather a political concept (Weyland 1996; 2017). For these reasons, the definition of populism based on economic policy is no longer frequently used in the scholarly work in economics and political science (Guriev and Papaioannou 2020; Rodrik 2020; Rovira Kaltwasser 2019; Weyland 2017).

Organizational Populism

Noting that populist leaders in Latin America have been both for and against heterodox economic principles, Weyland (1996; 1999; 2001) argues that the populist phenomenon can be better understood by focusing on political organization strategies rather than economic policy choices. More specifically, the main characteristic of populism understood as a political strategy is a direct and unmediated relationship between the populist leader and her popular base. In the author's words,

> Populism is best defined as a political strategy through which a personalistic leader seeks or exercises government power based on direct, unmediated, institutionalized support from large numbers of mostly unorganized followers.

Weyland 2001, 14

In practice, populist leaders seek to boost their autonomy and personalistic power by contesting, pushing aside, and dominating other actors and institutions. They legitimize their actions by claiming that they alone represent the will of the people. Such a claim becomes more credible due to the populists' direct and unmediated relationship with her popular base of support (Weyland 2001).

From this perspective, the relationship between populism and globalization is not unidirectional. Indeed, while Latin American populist leaders such as Alan García (Peru) and José Sarney (Brazil) promoted import substitution in the 1980s, other populist leaders in the 1990s endorsed trade liberalization, such as Alberto Fujimori and Fernando Collor de Mello (Faucher 2018; Weyland 1999). Such a seemingly contradictory relationship between populism and economic policy can also be witnessed beyond Latin America. For example, late-19th-century American populists were for reducing import tariffs, while many contemporary populists are rather protectionist (Rodrik 2021).

How is it possible that populism is combined with such different types of economic policies? Weyland (1996; 1999) argues that, on an abstract level, populism has both affinities and incompatibilities with neoliberalism. This allows populist leaders to take actions to either curtail or foster economic globalization, depending on what is more politically convenient in a given context.

Understanding the conceptual affinities and incompatibilities between economic globalization and populism as a strategy requires analyzing the relation between neoliberalism and economic globalization. According to Mudge (2008, 704–705), neoliberalism is an ideological system based on the idea of "(…) the elevation of the market – understood as non-political, non-cultural, machine-like entity – over all other modes of organization." A key element in this ideological system is the promise to generate wealth through imposing limits and discipline onto states and bureaucracies while facilitating free flows of goods and capital. Since the early 1980s, when US President Ronald Reagan led a wave of new trade policies, neoliberalism provided the ideological grounding for most free trade agreements (Dreiling and Darves 2016).

According to Weyland (1996; 1999), the micro-foundation of neoliberalism is the unmediated relationship between markets and individuals. Likewise, the foundation of populism as a strategy is the unmediated relationship between a leader and the individuals that make up her support base. Consequently, both neoliberalism and populism oppose intermediary organizations of civil society – such as trade unions, social movements, and NGOs – and reject their role as essential and legitimate players in markets and politics.

However, there are at least two critical incompatibilities between populism and neoliberalism. First, neoliberalism embraces universalistic principles and hence is uncomfortable with the personalization and concentration of power in the hands of populist leaders. Second, populists often rely on redistributive policies to maintain and gain support, and hence are at odds with the fiscal balance required by neoliberals (Weyland 1996; 1999).

Therefore, the feasibility of an alliance between populism and neoliberalism is context-dependent. In 1990s Latin America, hyperinflation and disappointment with import substitution policies called for radical change. Populist leaders saw neoliberalism as a way to signal a bold shift in economic policy and simultaneously criticize the political and economic establishment for their economic policy principles (de la Torre 2017; Weyland 1999). Neoliberals, in turn, find difficulties getting political support for unpopular reforms, such as austerity. Hence, they see an alliance with populists as an opportunity to have the political leverage they need to advance privatization, austerity, and trade liberalization (Weyland 1999).

In short, Weyland (1996; 1999; 2001; 2017) argues that populism is better understood in terms of the political rather than in terms of economic policy. Notwithstanding, it is possible to identify affinities and incompatibilities between populism as a strategy and different economic policy paradigms, such as neo-liberalism. Whether affinities or incompatibilities prevail depends on several contextual factors, including whether and why an economy is in deep crisis.

Ideational Populism

An influential definition of populism conceptualizes it as a thin ideology (Mudde 2004; Mudde and Kaltwasser 2017; 2018). As opposed to full ideologies, thin ideologies are restricted to a few core concepts and do not provide answers to all the major political questions and policy debates in a given society (Stanley 2008). The key features of populism understood as a thin ideology are twofold. First, it depicts a society divided into two homogeneous groups: the pure people and the corrupt elite. Second, it claims that popular sovereignty should prevail above all other principles, often leaving no room for pluralism.

Thin ideologies, such as populism and nationalism, are often combined with full ideologies, such as socialism and liberalism (Freeden 2003; Stanley 2008). Therefore, populism is nearly always combined with other ideological elements. Mudde and Rovira Kaltwasser (2018) identify two broad types of populism: inclusionary and exclusionary. The differences between inclusionary and exclusionary populism derive from how populist leaders and parties define "the people" and "the elite," as well as the other ideological features they mobilize. As opposed to exclusionary populism, inclusionary populism defines "the people" broadly and seeks to promote the material, political, and symbolic inclusion of marginalized groups.[4]

The relationship between populism as a thin ideology and the economy is not conceptual. Instead, it is contextual. Moreover, a common feature of leaders and parties that apply populist rhetoric is to bring new issues to the political debate (De Vries and Hobolt 2020). In this way, populism pressures mainstream elites to reconsider policies that were absent in political competition (Kaltwasser 2019). Therefore, whether populist leaders or parties implement policies that foster or

limit globalization depends on how populists define the political and economic establishment and the grievances they mobilize. For instance, in Europe, where public opinion over the European project is deeply divided, populist leaders and parties have an opportunity to thrive by bringing European integration to political campaigns (De Vries 2018; De Vries and Hobolt 2020). In turn, many Latin American populist leaders have mobilized grievances linked to inequality and economic deprivation by connecting them with views toward the United States and imperialism (Mudde and Rovira Kaltwasser 2013).

Economic Globalization as a Cause of Populism

On the one hand, economic globalization shocks have implications for the economic condition of countries, with significant heterogeneity across local labor markets and occupations (McLaren 2017). On the other, we know from a vast body of literature in political science that economic conditions – such as GDP growth, variations in unemployment rates, and inflation – affect the fortune of incumbents and can also lead to ideological and attitudinal shifts (Margalit 2019b). Increasingly, scholars link economic changes caused by globalization to political behavior (e.g., Autor et al. 2020; Colantone and Stanig 2018b). In what follows, I discuss which lessons we can draw from the literature as to the extent to which economic globalization is one of the causes of increasing support for populist parties in many countries in the Americas and Europe.

Studies on Trade

One of the most critical changes in the global economy in the last decades was the emergence of China as a key trade partner for many developing and developed countries. China's share of world exports rose from 1.1% to 12% between 1984 and 2021, with import trends presenting a similar pattern (World Bank, 2023). The increasing importance of China as a trade partner has implications for labor markets around the globe. Whether these implications are for the benefit or disadvantage of workers depends on each country's development level, local labor market specialization, and workers' occupations and skill levels (Ranu 2018).

In developed countries, trade with China led to worse working conditions for low-skilled workers, particularly those in the manufacturing sector. For example, increased import competition from China and other developing countries, such as Vietnam, led to the stagnation of real wages of unskilled workers, lower levels of labor market participation, and higher levels of inequality in the United States (Autor, Dorn, and Hanson 2016; Pierce and Schott 2016). Moreover, the effect of Chinese import competition can spill over from the manufacturing sector to local service sectors, as Malgouyres (2017) shows in the case of France. Furthermore, the effect of increased import competition from China goes beyond economic

losses. Indeed, British and American subnational regions more exposed to import competition present worse health indicators, more unstable mental health, and lower marriage and fertility rates (Autor, Dorn, and Hanson 2019; Colantone, Crinò, and Ogliari 2019; Pierce and Schott 2016).

In emerging markets and developing countries, the rise of China had at least two contrasting effects on labor markets. First, import competition from China decreases employment rates, formality, and, in some cases, wage levels for low-skill manufacturing workers and, more generally, in unskilled labor-intensive sectors. In Latin America, studies found that to be the case in Mexico, Chile, and Brazil (Álvarez and Claro 2009; Costa, Garred, and Pessoa 2016; Utar and Ruiz 2013). Second, the emergence of China led to increased demand for commodities and raw materials, benefiting workers in local labor markets specialized in these products. Costa, Garred, and Pessoa (2016) show that this was the case in Brazil, where subnational regions specialized in soybeans, nonprecious metals, oil, and gas experienced a surge in wages and formality levels.

Furthermore, studies show that the reduction of import tariffs negatively affects labor markets (see McLaren 2017 for a review). This finding contradicts predictions based on neoclassical economic models, in which welfare gains are expected from trade. Against the assumptions of such models, empirical studies show that workers have a hard time moving to other regions, occupations, and industries. Moreover, the effects are long-lasting and might even be amplified in the long run. In Brazil, for example, the impact of trade liberalization on regional earnings was three times stronger 20 years after the changes in tariffs than it was in the first ten years (Dix-Carneiro 2014; Dix-Carneiro and Kovak 2017).

The importance of trade shocks to the fortune of workers' welfare motivates an increasing body of literature on the political consequences of trade. From a theoretical standpoint, at least three outcomes are expected from increased exposure to trade. First, wage loss and unemployment should increase support for redistribution (Meltzer and Richard 1983). Second, a higher risk of unemployment and wage loss is expected to increase the demand for insurance (Rehm 2009; 2016). Third, deterioration of economic conditions leads to anti-incumbent and anti-establishment sentiment and voting (Fiorina 1978; Healy and Malhotra 2013). Based on that, the expectation should be that losers of trade globalization are more supportive of parties that are for the expansion of redistribution, and social security policies, and apply antielite rhetoric. However, empirical studies yield puzzling conclusions.

In the United States, import competition from China caused a shift to the right. US regions specialized in goods exported by China experienced a surge in the vote share for Republicans and conservative attitudes. This causal relationship between import shocks from China and shifts to the right is stronger after 2008 and in districts where most of the population is white (Autor et al. 2020). Moreover, Baccini and Weymouth (2021) show that manufacturing layoffs, in general, led to an increase in the vote share for the Republican party between 2004

and 2016 among whites only, raising the question of whether the specific causes of unemployment, wage loss, and economic hardship matters for political behavior.

Studying 15 countries in Western Europe, Colantone and Stanig (2018b) show that import competition from China increased support for far-right, nationalist, and isolationist parties between 1988 and 2007 in more exposed regions. They also find a general shift to the right in the electorate. In another study, the same authors find an effect of import competition from China on support for the leave option in the Brexit referendum (Colantone and Stanig 2018a). Moreover, a number of country-specific studies go in the same direction. For example, Barone and Kreuter (2021) find that the vote share of populist parties increased in Italian municipalities more exposed to Chinese import competition between 1992 and 2013. Dippel et al. (2022) exploit the fall of the Iron Curtin in 1989 and China's accession to the WTO in 2001 to analyze how increased import competition from Eastern European countries and China impacted voting behavior in Germany. They find that increased import competition benefited fringe extreme-right parties and that this effect is mainly driven by low-skilled manufacturing workers.

Few studies on the effects of trade on political behavior focus on Latin America and developing countries more generally. Campello and Urdinez (2020) find that both legislators and voters develop more negative attitudes toward China in Brazilian local labor markets more exposed to Chinese import competition. However, they do not find positive effects in subnational regions that benefited from increased exports to China. Costa, Junior, and Rocha (2019) show that trade liberalization in Brazil had long-lasting effects on political behavior through religion. More specifically, in subnational regions more exposed to tariff reduction, Evangelical Pentecostal churches and the vote shares of candidates connected to them experienced a surge. Moreover, Ogeda, Ornelas, and Soares (2021) find that trade liberalization in Brazil caused a decrease in vote shares for left-wing parties by weakening trade unions.

Overall, studies on the effects of trade on political behavior show that far-right nationalist and populist parties were able to mobilize grievances caused by the negative impact of trade on local labor markets, while mainstream left-wing parties lost support. Several factors moderate this relationship. Examples of such factors are racial identity, the presence of labor unions, and the generosity of welfare states. More studies are needed to establish whether deteriorating labor market conditions caused by trade affect political behavior differently than worsening labor market conditions caused by other reasons, such as economic policy failures. I discuss these issues in the following subsections.

Studies on Financial Globalization

The effects of financial globalization on populism have not received nearly as much attention as trade (Rodrik 2021). Perhaps this is because the distributional effects of financial globalization have not received as much attention as those of

trade. Yet, existing studies suggest that the many dimensions of financial globalization (e.g., foreign direct investment – FDI – and foreign debt) have welfare and distributional consequences.

FDI, for example, ~~have~~ positive effects on labor markets and local economies. Analyzing 40 developing countries, Van Treeck and Wacker (2020) provide evidence that an increase in FDI is associated with a higher GDP fraction attributed to labor. Javorcik (2004) uses firm-level data from Lithuania to analyze whether the positive effects of FDI spill over to other sectors. The study identifies a positive impact of FDI in upstream firms, that is, in local suppliers for foreign firms. Along the same lines, Crescenzi and Limodio (2021) show that a surge of Chinese FDI in Ethiopia improved local growth but only 6 to 12 years later. This study also shows that local firms operating in upstream and downstream sectors expand sales, investments and inputs in the medium run.

Moreover, many studies show how remittances help to decrease poverty and improve household well-being. For instance, Adams and Page (2005) analyze data from 71 developing countries and conclude that a 10% per capita increase in official international remittances causes a 3.5% decline in people living in poverty. Along the same lines, Acosta et al. (2008) show that remittances decreased inequality and poverty in Latin America and Caribbean countries and Wagle and Devkota (2018) provide evidence that remittances reduced poverty and improved household welfare in Nepal.

By contrast, cross-border debt can increase volatility and risk for firms and households. For example, Buch and Pierdzioch (2014) analyze data from 11 European countries, the United States, and Japan, and provide evidence that cross-border assets and liabilities increase the volatility of the number of hours worked, especially for low-skilled workers. Moreover, Razin and Sadka (2018) argue that financial globalization triggers a race-to-the-bottom tax competition, ultimately affecting the generosity of welfare states.

A few studies have analyzed the impact of economic shocks caused by financial globalization on voting for far-right parties. Funke, Schularick, and Trebesch (2016) provide a comprehensive analysis of the effect of financial crises on 800 general elections in 20 advanced democracies. They find that financial crises increase support for far-right parties. They also find that other types of crises, such as those linked to business cycles, do not produce the same effects. Ahlquist, Copelovitch, and Walter (2020) analyze the impact of a sudden revaluation of the Swiss franc on political behavior in Poland, where many people took low-interest rates mortgages in Swiss Francs. They find that Polish individuals more exposed to this shock were more likely to support *Prawo i Sprawiedliwość* (PiS), a party that ran on a platform combining its usual anti-immigration and nationalist ideas with a proposal to make the banks pay a large share of the costs. Gyöngyösi and Verner (2021) find similar effects in the context of Hungary.

Moreover, a few other studies analyze how financial globalization impacts the fortune of incumbents. Owen (2019) shows that the announcement of new

FDI projects improve the chances of Brazilian mayors' reelection. Leveraging a four-wave panel study with Kyrgyz citizens, Tertytchnaya et al. (2018) show that fluctuations in remittances impact trust in the incumbent president. They also use cross-sectional data from 28 countries in Central Eastern Europe, the Caucasus, and Central Asia to suggest that their results from Kyrgyz panel data have external validity. Furthermore, Campello and Zucco (2016; 2020) show that changes in US interest rates and commodity prices affect the reelection chances of Latin American presidents.

Overall, negative financial shocks caused by globalization have benefited far-right populist parties in advanced democracies. Moreover, changes in remittances and FDI affect incumbents' support in Brazil and Central Eastern Europe, the Caucasus, and Central Asia. These findings are similar to those of the literature on the political consequences of economic shocks caused by trade. However, more research is needed to understand whether the effect of trade and financial globalization on political behavior are indeed similar and whether they operate through similar or different channels. Below, I conduct an illustrative exercise that suggests that different types of economic globalization may have different effects on populism.

Populism and Economic Globalization: An Illustrative Exercise

To illustrate how the relationship between economic globalization and populism is likely to differ depending on the type of economic globalization being considered, I conduct an illustrative and exploratory exercise based on two datasets. The first is the KOF globalization index (Gygli et al. 2019), presented in the second section of this chapter. The second is a dataset measuring the average level of populism in the speeches of presidents and prime ministers based on human coding. This dataset includes 40 countries between 2000 and 2018 (Hawkins et al. 2019). Once I merge the two datasets, I end up with an unbalanced panel at the country level. I then construct the following specification:

$$Populism_{ct} = \alpha_c + Globalization_{ct-1} + \epsilon_{ct}$$

where the dependent variable ($Populism_{ct}$) is the average level of populism in the speeches of the president or prime minister of country c during the term that begins in year t. The main independent variable ($Globalization_{ct-1}$) is the level of economic globalization in country c one year before the term begins ($t-1$). The level of globalization is measured in one of the following ways: *de facto* trade globalization, *de jure* trade globalization, *de facto* financial globalization, and *de jure* financial globalization.[5] α_c are country fixed effects and ϵ_{ct} are standard errors clustered at the country level.

Table 5.3 displays the results. Column 1 shows that an increase of one standard deviation in *de facto* trade globalization index is associated with a rise of 0.465

TABLE 5.3 Economic Globalization and Populism

	(1)	(2)	(3)	(4)
	Populism	Populism	Populism	Populism
Trade (df), $t-1$	0.465⋆			
	(0.233)			
Trade (dj), $t-1$		0.096		
		(0.170)		
Financial (df), $t-1$			0.192	
			(0.150)	
Financial (dj), $t-1$				0.167
				(0.174)
Obs.	155	155	155	155
N countries	40	40	40	40
R^2	0.623	0.603	0.606	0.604
Country FE	Yes	Yes	Yes	Yes

Note: Country-level regression; dependent variable is the average level of populism in the discourses of the president or prime minister of country *c* during the term that begins in year *t*. Independent variables in columns (1), (2), (3), and (4) are, respectively, trade globalization *de facto* (df), trade globalization *de jure* (dj), financial globalization *de facto* (df), and financial globalization *de jure* (dj). All models include country fixed-effects. Data source for independent variables is the KOF Globalization Index (Gygli et al., 2019) and for the dependent variable is the Global Populism Dataset for Leaders 1.0. (Hawkins et al. 2019). Variables are standardized. Robust standard errors in parentheses. ⋆ p<0.10, ⋆⋆ p<0.05, ⋆⋆⋆ p<0.01.

standard deviation in the level of populism in the discourses of presidents and prime ministers.[6] However, this relationship is statistically significant only at the 90% confidence level. Moreoever, when year fixed effects are introduced, it no longer achives conventional levels of statistical significance. The coefficients for all other types of economic globalization (columns 2–4) being considered are not statistically significant at conventional levels.

Overall, this simple exercise suggests a relationship between *de facto* trade globalization and populism, which many studies discussed above find. The fact that the coefficients for the other types of economic globalization are not statistically significant might indicate that the index conflates many different aspects of the other three dimensions of economic globalization. Take the example of financial globalization presented in the previous subsection. I discussed how the literature shows that FDI and international debt are expected to have very different effects on the economy and, consequently, on political behavior. Yet, the KOF index of *de facto* financial globalization conflates these two aspects of financial globalization. Alternatively, the model might be underpowered. Overall, a more detailed analysis is necessary to understand the relationship between different types of globalization and the use of populist rhetoric by political leaders.

Globalization and the Economic and Cultural Drivers of Populism

In the sections above, I discussed how economic globalization influences people's material conditions and the implications for the success of populist parties and leaders. Hence, it might be logical to think that the only channel through which economic globalization can affect political behavior is through attitudes related to the economy. Yet, this is not necessarily the case because grievances grounded on economic conditions can be expressed as preferences not directly linked to the economy (Margalit 2019a). Moreover, populism is linked to attitudes not directly related to the economy, such as immigration (e.g., Norris and Inglehart 2019). The current challenge is to bridge these two accounts of the drivers of populism by shedding light on how material and immaterial motivations interact.

Furthermore, the interaction between material and immaterial factors is critical for understanding how globalization shapes public opinion and political behavior beyond populism. For example, previous research shows that individuals who are anxious about the cultural aspects of globalization are also more likely to perceive international trade as harmful (Margalit 2012). This might be explained by how immigration, cross-border trade, and financial flows are perceived. Suppose they are perceived as a threat to the nation as a whole. In that case, we should expect that economic globalization increases the salience of a sense of common nationality and hence lead to more opposition to other types of globalization, such as immigration (see Shayo 2020).

In a survey experiment conducted in the United States, Di Tella and Rodrik (2020) provide evidence that economic shocks are at least in part interpreted through cultural lenses and that narratives about the causes of the shock matter. In this study, the authors randomize vignettes that provide different reasons for why a factory has to close. The reasons are automation, a shift in consumer preferences, bad management, outsourcing to France, and outsourcing to Cambodia. They show that the only treatment condition that increases support for transfers to workers is bad management. Automation, shift in consumer preferences, and outsourcing increase support for protectionism. Moreover, the effect of outsourcing is stronger than automation and shift in consumer preferences. The authors also show that the effect of outsourcing to Cambodia is stronger than to France.

Can Populism Reverse Economic Globalization?

Although not all populists are anti-globalization (Rodrik 2021), many populist parties and leaders pressure mainstream elites to reconsider economic globalization (Rovira Kaltwasser 2019). To the best of my knowledge, only one comparative study tests whether populists in government change a country's course of integration into the global economy. Funke, Schularick, and Trebesch (2020) use synthetic control methods and a new database of populists in government

covering 100 years and 60 countries. Their findings suggest that once in power, both left and right populists raise import tariffs, but only left populists cause a decrease in financial globalization. Their results raise a few questions. If populism is not closely related to any type of economic policy, then why do left and right populists increase tariffs? Is it because most populists come to power as a result of grievances generated by increasing trade integration and hence promising to reverse this trend?

Conclusion

The relationship between populism and economic globalization depends on how populism is defined. Despite that, recent research shows that economic losses caused by trade and financial globalization increase the support for far-right populist parties. Although the channels are still poorly understood, there is some evidence that grievances caused by economic loss can be manifested as attitudes and preferences not directly linked to the economy, such as nationalism. More research is needed to understand better the channels linking grievances caused by the many dimensions of economic globalization to populism. Moreover, how populists manage economic integration once in power and is still an open question.

Notes

1 Another dimension of globalization that is often important in the literature on globalization and populism is immigration (see, e.g., Mudde and Rovira Kaltwasser 2018; Rodrik 2021 for recent reviews).
2 For more details about the index, see Gygli et al. (2019).
3 The New Deal was a series of programs, projects, and reforms aimed at promoting economic relief and recovery during the Great Depression.
4 Importantly, a populist leader or party will hardly be purely inclusionary or exclusionary. For example, welfare chauvinism – a position often adopted by exclusionary populists in Europe – puts forward that foreigners and immigrants should be excluded or have lower priority in accessing welfare programs than nationals. The justification for such position is the need to provide better services to poor nationals (Mudde and Rovira Kaltwasser 2013).
5 See Table 5.1 and Gygli et al. (2019) for more details about what variables these indices contain and how they are constructed.
6 I use the inverse-hyperbolic sine transformation to deal with the zeros in the dependent variable. As a result, the coefficient can be interpreted as a semi-elasticity.

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6

THE POLITICAL ECONOMY AND POLITICAL PSYCHOLOGY OF PUBLIC SUPPORT FOR RIGHT-WING POPULISM IN COMPARATIVE PERSPECTIVE

Diogo Ferrari

Introduction

Support for right-wing populists (RWP) increased substantially in various European countries in recent years. Between 2002 and 2016, it grew by more than 200 percentage points in France, Austria, and Finland (Rooduijn 2019). The emergence of politicians representing RWP ideas occurred in other democracies across the globe as well, as demonstrated by the winners of the ~~Presidential~~ election in countries such as Brazil (2018) and the USA (2016). The electoral success of RWP has drawn the attention of the media and scholars ~~altogether~~. A quick search on the web of science shows an exponential increase since 2004 of papers that use the word populism, and part of that literature is dedicated to understanding electoral support for RWP candidates, which is the topic of this chapter.

Despite the recent increase in scholars' interest in populism and RWP, studies of the electoral success of populist politicians are not new. They date back to the 50s and 60s when researchers started accumulating efforts to conceptualize and understand the social roots of populism (Germani 1978; Ionescu and Gellner 1969). In those early studies, specialists were already connecting the emergence of support for populism to macro-level and structural economic changes (ibid.). While part of the recent political economy literature follows that tradition to some extent and adds new layers of explanation (Baccini and Weymouth 2021; Colantone and Stanig 2018a; 2018b; Norris and Inglehart 2019; Spoon 2005), other studies in political behavior and political psychology have emphasized the micro-level psychological and attitudinal aspects of public support for populism, such as resentment of the status quo (Capelos and Demertzis 2018) and perceptions of some groups that their status, culture, and economic positions are under threat by other traditionally non-dominant groups, such as non-whites (Baccini and Weymouth

2021; Mutz 2018), non–males (Givens 2004), and immigrants (Colantone and Stanig 2018b; Golder 2003; Hays, Lim, and Spoon 2019; Ivarsflaten 2008).

In this chapter, I critically evaluate these explanations of public support for RWP with emphasis on those political economy and political psychology arguments. I discuss some shortcomings of those perspectives and argue that a more promising direction is an integrative approach that combines them. The core argument here is that short- and mid–term economic hardship conditions can trigger perceptions of cultural and status threats, affective reactions against some social groups, and political elites, and increase dissatisfaction with the political regime and the economy. In combination, these factors electorally favor RWP candidates among some sectors of the voters. In other words, some specific psychological factors (dissatisfaction, resentment, perception of threat, anti–immigrant sentiments) mediate the connection between economic conditions and RWP support. Additionally, I discuss the need for more studies that investigate the demand side of populism from comparative and temporal perspectives. The weight of those economic and psychological factors varies across countries. More comparative research is needed to understand why and how that happens.

In the next section, I discuss the concept of right–wing populism, followed by a review of strains of political economy and political psychological arguments about the causes of the electoral success of politicians that represent an embodiment of that concept. Then, I propose an approach that integrates that literature to overcome some of its shortcomings. Finally, I present some preliminary analysis that suggests the usefulness of the integrative approach proposed here using eight waves of the European Social Survey (ESS) collected biannually in Europe from 2002 to 2018.

Populism and Right-Wing Populism

It is useful to start with a conceptual discussion of populism more generally, and RWP more specifically, since it helps to justify why investigating the causes of public support for RWP matters, and why we need a theory of public support for RWP parties. Conceptual debates around the topic are not new, and they are heavily context–dependent.[1] There are currently various general definitions of populism that aim at a comparative, cross–country classification of parties and politicians. Arguably, the four most salient ones understand populism as a thin ideology (Mudde 2004), a political strategy (Weyland 2001), a discourse or rhetoric (Laclau 1977; 2005), or a performative approach of politicians to politics (Ostiguy 2009). There is some overlap between these different definitions, but also some important differences.

The performative approach (Ostiguy 2009) understands populism in light of a "low–high" axis, which includes two subdivisions, that classifies the way political actors relate to people. One is a sociocultural dimension, which refers to the politicians' manners, demeanors, ways of speaking, dressing, and the vocabulary

they use. Another is a political–cultural dimension, which captures styles of decision-making and leadership. Populists are those who score "low" in both subdimensions. They score low socioculturally because they often use slang, folksy expressions, and coarse language, as opposed to the well-behaved, "bookish," and rationalist discourse of "high" politics. They also score "low" in the political-cultural dimension because they appeal to people who want strong personalistic leadership that represents the popular will, as opposed to formal, institutionalized decision-making processes. The low–high axis is orthogonal to other political dimensions, such as the left–right ideology axis. RWP in this perspective is the use of "low" politics (form) to defend ideas (content) of social order, "community life," hostility to cultural differences, personalism, and authoritarian practices to enforce political decisions (Ostiguy 2017; Ostiguy, Panizza, and Moffitt 2020). From this perspective, right-wing populism is closer to conservatism and more about personalism, social order, status preservation, and anti-diversity than about a defense of economic aspects of right-wing ideology, such as property rights, a minimal state, and an open market.

The discursive approach (Laclau 1977; 2005) understands populism as an "empty signifier," a rhetoric used by some politicians to persuade voters to grant them electoral support. In this perspective, no judgment is made about the commitment of the speaker to the ideas she propagates. The "populist" aspect of the discourse rests on the argument that the "will of the people" is the only source of legitimate political authority, and the "political establishment" is a set of self-serving elites that oppose that will. The main feature of this approach is that it looks only at the politicians' rhetoric, but disregards whether their actions reflect their ideas. Norris (2020) builds on this definition and conceptualizes a "first-order" aspect of populist rhetoric as claims about the distribution of power to "the people" as opposed to the establishment. This is supplemented by "second-order" principles that lead to various types of populisms, including left- or right-wing economic positions and liberal versus conservative values.

The thin-ideology perspective (Mudde 2004) states that populism is an ideology to the extent that it provides an image of the nature of contemporary society and its political environment. It separates society into two groups: a "pure people" and the "corrupt (political) elite." It lacks features that some scholars attribute to (thick) ideologies, such as a set of normative ideas about the nature of human beings, society, the purpose of the latter, and prescriptive remedies to solve social problems, as in liberalism, socialism, and communism. Populism can capture and incorporate aspects of other thick, or "host" ideologies in such a way that is possible to talk about nativist populism or left- and right-wing populism. Mudde (2010) defines *radical* right-wing populism as xenophobic nationalist parties that oppose values of liberal democracy (hence "radical") and naturalize inequalities in society (hence "right-wing"). Like scholars of the performative approach, the author opts to not use right-wing ideology in an economic sense (free market,

minimal state) to describe the "right-wing" qualities of what he calls radical right populist parties.

The political strategic, or organizational approach (Weyland 2001) defines populism as a strategy of personalistic leaders to exercise power using direct, unmediated, and uninstitutionalized support of an unorganized public (Weyland 2017). In terms of power capacity, populists rely on general public support, as opposed to other personalistic leaders such as *caudillos*, who rely on military coercion, and patrimonialists, whose power emanates mainly from the support of the economic elite. Any political leadership in democracies relies to some extent on popular support, but a distinctive feature of populists is the combination of popular support as a source of power and a personalistic leader as the ruler, as opposed to clientelist leaderships, whose rulers are often informal groupings, and party government, which relies on party organization. RWP in this view emerges because populist leaders use right-wing ideas opportunistically to maximize their electoral gains. There is no deep ideological commitment, however, and RWP may soften their political position if that is electorally profitable.

The strategic definition is the only approach that truly emphasizes the importance of public support. It puts public support at the center of the definition of populism, while other approaches treat "the people" as part of the discourse or ideology of populist politicians. For the strategic approach, without public support as a source of power and a public to target electorally, there is no populism. But the definitions of populism do not translate directly to theories of popular support for RWP politicians. For instance, the strategic approach does not say why the public would favor a populist candidate. As it upholds that populism is a strategy to exercise power in a personalistic manner through unmediated public support and that populists use whichever ideology is more likely to attract votes, it implies that there is a preexisting public with some predispositions and attitudinal tendencies that the populist just identifies and exploits. If so, then, by definition, some attitudes will be associated with populist support because populist political positions are just mirroring those preexisting public attitudes. That same idea is reflected in Norris (2020, 700), who argues that various types of populism "reflect core socioeconomic and cultural cleavages in the mass electorate." Similar reasoning applies to the thin-ideology perspective. Since populists adopt other "host" ideologies, populist supporters are those more sympathetic to these. Therefore, it assumes a preexisting set of attitudes among the public. Mudde (2017, 32) writes:

> if populists want to become politically relevant, they will have to define the people in terms of some of the key features of the self-identification of the targeted community. For instance, no American populist will describe the people as atheist and no West European populist will define the people as Muslim. In other words, the populist's perception of the people is usually related to the self-perception (or self-idealization) of the targeted people.

This does not prevent, however, the possibility that RWP politicians activate some latent predispositions that otherwise would remain latent.

This discussion implies that to understand public support for populists in general, and RWP in particular, we need to look at public attitudes directly related to the distinctive features of populist leaders that make them *populists*. And we need to understand how these attitudes relate to other attitudes of voters toward populist leaders' right-wing policy positions that are not directly related to ~~populists~~ *populism,* such as anti-immigration or social conservatism. In that direction, Hawkins, Read, and Pauwels (2017, 280) argue that "[d]rawing on the ideational theory, we can think of several factors likely to interact with populist attitudes, including perceived corruption, assessments of government performance, quality of representation, and ideological or issue positions."

Causes of Support for Right-Wing Populism

Part of the literature on voters' support for populists ~~focus~~ only on macro- and micro-level factors that are often "exogenous" to the definition of populism, or are close to one specific conception of populism but distant from others.

For instance, the *left behind culturally argument* concerns the fact that some people feel their worldview is threatened by the values of multiculturalism, sexual freedom, and gender and racial equality that emerge in connection to modernization, globalization, and generational changes (Inglehart 2018; Inglehart and Welzel 2005; Minkenberg 2000; Mudde and Kaltwasser 2017; Norris and Inglehart 2019). One difficulty with this explanation is that those macro-level processes take many years to unfold, so they often cannot explain short-term fluctuations or the recent increase in RWP electoral support in some countries. These difficulties can be ameliorated if we consider that the salience of some issues can activate those feelings, such as immigration, the sudden expansion of inclusive social rights, or economic crises. In any case, those who feel culturally threatened become more likely to support politicians that represent the preservation of traditional social values and hierarchies. This could help to understand support for populists along the lines of the conception of Ostiguy (2017) about RWP parties, or the radical right populist "maximum definition" of Mudde (2010). But if we understand populism as a "thin-centered" ideology (Mudde, 2017), it is unclear from this explanation why people would prefer a RWP over a RW if both favor nativist or conservative values.

In terms of anti-immigration, authors have shown that the actual proportion of immigrants is associated with support for far-right ideologies (Lubbers and Scheepers 2002; Swank and Betz 2003). The psychological mechanism that can explain this association is that influx of immigrants can trigger the perception of a cultural and economic threat. Sniderman, Hagendoorn, and Hagendoorn (2007), for instance, show that feelings of threat to national identity explain exclusionary reactions against immigrants. In the same direction, Lubbers (2008) shows that

national identity concerns are associated with Dutch Euro–skepticism. Other studies point to the same direction of association between anti–immigrant sentiments and right–wing nativism and far–right support (Ivarsflaten 2005; Lucassen and Lubbers 2012; Norris 2005; Sniderman, Hagendoorn, and Prior 2004).

Theoretically, although social conservatism, anti–immigrant sentiments, and Euro–skepticism can lead to far–right support, it is not clear why it would lead to ~~increase~~ support for the populist aspect of RWP. People could support non–populist parties that advocate anti–immigration, conservatism, and protectionist policies.

A fast–growing literature has investigated the effect of economic shocks and downturns on RWP politicians' public support. One of the arguments states that RWP harvests electoral support from those who feel *left behind economically* or *threatened economically* by modernization, immigration, and globalization processes. Similar to the *left behind culturally* thesis, some may feel left behind because economic changes and globalization altered the skill set and human capital required to maintain well-paid positions in the marketplace, diminishing the returns of those low-skilled workers who would have had better outcomes in the immediate postwar period (Betz 1994; Golder 2003; 2016). Along those lines, authors have argued that immigration can trigger perceptions that immigrants compete for jobs and drain welfare resources from the native-born population (Colantone and Stanig 2018a; 2018b).

There are two important considerations regarding these economic arguments. The first is that the modernization–globalization explanation encounters the same difficulties discussed above for the *left behind culturally* argument about short–term fluctuations in public support for RWP. These macro-level processes take years to unfold, and geographic areas are not affected in the same way. These problems are mitigated in recent literature that focuses on trade–induced economic shocks in specific regions. Hays, Lim, and Spoon (2019), for instance, demonstrate how trade–induced economic shocks increase support for RWP in Europe using NUTS–level socioeconomic data.[2] Baccini and Weymouth (2021) show that deindustrialization and local economic hardship provoking job losses increased support for Trump among affected white voters, while blacks affected in similar ways responded differently and became more likely to vote for Democrats. The role of economic hardship among whites, according to the authors, is that it threatened their dominant group status, which increased their chances of voting for the candidate that represented a preservation of racial hierarchies. This resonates again with the arguments of Ostiguy (2017) and Norris (2020) about the right–wing and conservative subdimensions of populism.

A second critique of the economic argument is similar to the one discussed above: Why would economic shocks make people turn to populists and RWP instead of non–populist nationalists or conservative candidates that propose to bolster the economy and preserve social hierarchies? In the USA in 2016, a possible answer was the lack of a more diverse set of options on the supply side. But from a

theoretical perspective of populism as a "thin-centered" ideology (Mudde, 2017), for instance, it is easy to see that for many of those arguments it is not the *populist* but the "host" ideologies characteristics of the populist candidate (e.g., conservatism and preservation of racial hierarchy) that attract some of the voters. The missing piece is the public attitudinal dimension that favors populist candidates as opposed to non-populists who are otherwise similar in political positions. What is the attitudinal dimension in the public, in addition to conservative, anti-immigrant, and Euro-skeptical sentiments, that favor RWP as opposed to right-wing or far-right conservative, nationalist, non-populist parties?

The additional attitudinal element in public attitudes I explore here that can lead to support for RWP as opposed to non-populist right-wing or far-right parties is resentment of the political elite, distrust in political parties, and dissatisfaction with the economy (see Capelos and Demertzis 2018; Capelos and Katsanidou 2018). This argument is based on some of the key features of populist candidates discussed earlier that is often absent in other RW non-populist alternatives. The RWP parties present themselves as outsiders, anti-establishment, and anti-elitists. Hence, we would expect that the chances of supporting populists increase when people do not trust political parties and are dissatisfied with democracy and the economy. Resentment, distrust, and dissatisfaction can lead to support for RWP as opposed to non-populist right-wing or far-right parties. Moreover, I contend that those attitudes are affected by decline in economic conditions, and therefore work as mediators, connecting economic conditions with populist support.[3] This argument builds a bridge between political behavior and the political economy literature about populist vote.

The Mediation Effect of Perceptions and Attitudes

The discussion above suggests that a venue for advancing the literature on populist and RWP public support is a combination of political economy and political behavior literature, but also an incorporation of "populism" into the analysis of public attitudes. To state my argument more precisely, I argue that micro- and macro-level economic conditions affect resentment of the political elite, distrust in political parties, and dissatisfaction with the economy. These perceptions and sentiments connect to the *populist* aspect of RWP parties. When these sentiments are combined with the perception of economic or cultural threats, for instance, from immigrants or other minorities, it increases support for RWP candidates who represent conservative values (Ostiguy 2017), nativist, or anti-establishment positions (Mudde and Rovira Kaltwasser 2017), which are some *right-wing* aspects of RWP parties.

Various authors have shown that local macro-level economic shocks increase support for RWP (Baccini and Weymouth 2021; Colantone and Stanig 2018b; Hays, Lim, and Spoon 2019). But those shocks do not affect families in the

same way. Those most affected are the most vulnerable. Hence, not only do aggregate-level shocks matter, but the family-level economic conditions matter as well.

Empirical Evidence

We can find empirical evidence for the mediation effect discussed above in the ESS data. The ESS is a widely used, highly reliable, academic-driven survey conducted across European countries. It has collected face-to-face interviews biannually since 2002. For the empirical analysis below, this chapter uses cross-sectional data from 2002 to 2018.

The survey contains a question about the party the interviewee voted for in the last general election. I coded RWP parties as 1, and non-RWP parties as 0. The classification of parties as RWP follows recent literature (Burgoon et al. 2019; Fella and Ruzza 2013; Ferrari 2021; Mudde 2007; Rooduijn and Burgoon 2018; Tarchi 2008). It is summarized in Table 6.1, as presented in Ferrari (2021).

Standard sociodemographic variables collected in the survey include household income (in deciles), education (five levels), and gender (male *versus* female). It also collected people's self-placement in the left-right ideology scale (11 levels), coded such that larger values mean more right-wing placement. I standardized income, ideology, and education for the analysis.

The survey asked people about their degree of satisfaction with the economy and democracy, trust in political parties, and perception that immigrants are bad for the economy and the culture of the country. I use the first three variables to capture the idea of resentment toward the political elite and the status quo. The last two variables capture the native population's perceptions of cultural and economic threats from immigrants which, according to the argument above, can favor electorally RWP parties that stand for anti-immigration policies and socially conservative ideas. Although the RWP parties vary across countries in their emphasis on anti-immigration, anti-elitism, economic liberalism, and social conservatism, we can use the list in Table 6.1 and these variables to investigate general comparative trends and how those factors capturing resentment and anti-immigrant attitudes are associated with RWP support.

Consider first Figure 6.1. It shows the association between votes for RWP and sociodemographic, anti-immigrant, and resentment variables. The points include only statistically significant coefficients of a logistic regression that uses votes for RWP as a dependent variable. The additive independent variables are listed in the legend of the figure. The relative stability of the associations across countries and over time is evident from the figure. Except in very few cases, the direction of the association (negative to positive or vice versa) between the variables does not change. Consider the perception that immigrants are bad for the economy. It is always positively associated with support for RWP and never crosses the zero line. A similar pattern emerges for perceptions that immigrants are bad for

TABLE 6.1 Right-Wing Populist Parties in Europe

Country	Right-Wing Populist Party
Austria	FPÖ, BZÖ
Belgium	Vlaams Blok (Flemish Block, VB), Vlaams Belang (Flemish Interest, VB), Lijst Dedecker, Démocratie Nationale (Front National)~~Vlaams Blok (Flemish Block, VB), Vlaams Belang (Flemish Interest, VB), Lijst Dedecker, Démocratie Nationale (Front National)~~
Czechia	Úsvit Tomia Okamury (Dawn)
Denmark	Dansk Folkeparti (Danish peoples party)
Finland	True Finns, Finnish Peoples Blue-whites
France	FN(⋆) (Front National), MNR (Mouvement National Républicain) ~~FN(⋆) (Front National), MNR (Mouvement National Républicain)~~
Germany	National Democratic Party, Republikaner (The Republicans), AfD (Alternative for Germany)
Greece	Xrusi Augi (Golden Dawn), LAOS (Popular Orthodox Party)
Hungary	Jobbik, Fidesz
Italy	Forza Italia (Forward Italy), Lega Nord (Northern League), Alleanza Nazionale (National Alliance), Fiamma Tricolore (Tricolor Flame) ~~Forza Italia (Forward Italy), Lega Nord (Northern League), Alleanza Nazionale (National Alliance), Fiamma Tricolore (Tricolor Flame)~~
Netherlands	List Pim Fortuyn (LPF), Party for Freedom (PVV)
Norway	Progress Party (FRP)
Poland	League of Polish Families (LPR), Congress of the New Right (KNP)
Slovakia	Slovak National Party (SNS)
Slovenia	Slovene National Party (SNS), Slovenian Democratic Party (SDS)
Sweden	Social Democrats, Sverigedemokraterna
Switzerland	Schweizerische Volkspartei (Swiss People's Party), Freiheits-Partei, Ticino League
United Kingdom	UK Independence Party, British National Party (BNP)

(⋆) Party name changed to Rassemblement National in 2018.

countries' culture. Except for Hungary and in 2008 in Sweden, it is always positively associated with support for RWP whenever that association is significant. The same can be said about dissatisfaction with the economy (except for a case in France, one in Finland, and one in Hungary) and the political parties (except for one case in Switzerland). In the vast majority of the cases, these two variables that have been used by the literature to capture resentful effect are positively associated with support for RWP. Finally, ideology follows the same pattern. Except for one case in Sweden, it is consistently and significantly associated with voting for RWP. In sum, Figure 6.1 suggests that the *attitudinal* bases (broadly understood to include perceptions and affectivity) of RWP in European countries are composed of ideology, resentment of the status quo, and perceptions that the country is threatened culturally and economically by immigration.
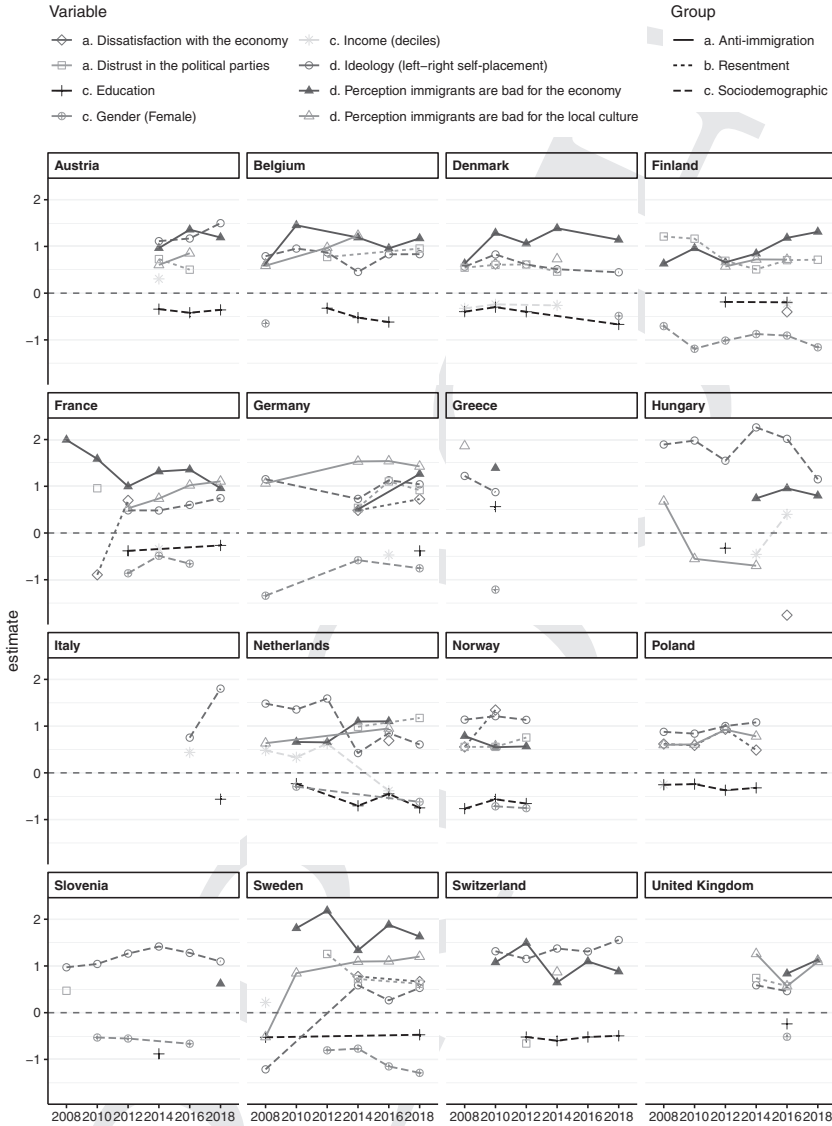
FIGURE 6.1 Association between Resentment and Anti–Immigration Attitudes and Vote on Right–Wing Parties

Various authors have highlighted that the *socioeconomic* bases of RWP supporters, on average, include low–income, relatively uneducated young males (Arzheimer 2009; Arzheimer and Carter 2006; Capelos and Demertzis 2018; Capelos and Katsanidou 2018; Evans 2005; Golder 2003; Hays, Lim, and Spoon 2019; Lubbers,

Gijsberts, and Scheepers 2002; Lubbers and Scheepers 2002; Lucassen and Lubbers 2012). Figure 6.1 provides evidence in that same direction. Except for a few cases, notably the case of income in the Netherlands, education and income are negatively and systematically associated with support for RWP. The same goes for being female.

Notice that household income seems less important than the other variables, but concluding that it does not matter much can be misleading. The core argument I am putting forward in this chapter and elsewhere (see also Ferrari 2021) is that the attitudinal bases of RWP support are not evenly distributed across socioeconomic groups. In other words, it is not only the case that income is negatively associated with support for RWP, but that as income decreases, it increases, on average, resentment, dissatisfaction with the economy, and perceptions of cultural and economic threats. Hence, the socioeconomic dimension (household-level income) affects the attitudinal aspect of support for right-wing populism, therefore affecting the latter indirectly.

Path analysis can provide evidence for this argument about the indirect effect of family-level income on support for RWP that goes through resentment and perception of threat. Consider first Figure 6.2. It uses the resentment and anti-immigrant attitude indicators as dependent variables and the other sociodemographic factors as independent ones. The figure displays only statistically significant associations between those dependent variables and family-level income. The stability of the negative association across space and over time is remarkable. As income decreases, people are more inclined to feel threatened by immigrants and display dissatisfaction with the economy, democracy, and political parties.

Finally, Figure 6.3 shows the results of a mediation analysis (Imai, Keele, and Tingley 2010; Tingley et al. 2014) of the effect of household income on RWP for all countries and years separately. The mediator is the first principal component from a principal component analysis, constructed using the attitudinal dimensions with the anti-immigrant and resentment variables. The variables needed to be aggregated into a single index because they are mutually dependent (see discussion in Ferrari 2021 and Park and Esterling 2020). We cannot draw strong conclusions from the mediation analysis because sequential ignorability very likely does not hold (Imai, Keele, and Yamamoto 2010). In this analysis, sequential ignorability means that there is no omitted confounder between the mediator and the outcome or between household income and both the mediator and the outcome. So even though I use the word mediation (or indirect) "effect," we cannot interpret the results causally without strong assumptions that sequential ignorability holds. Nevertheless, the results are suggestive and favor the theoretical argument of this chapter.

The left panel of Figure 6.3 shows the indirect association between household income and RWP support, mediated by the index that captures resentment and anti-immigrant perceptions. The points indicate country–year results and only include statistically significant indirect associations. I fit a regression line to
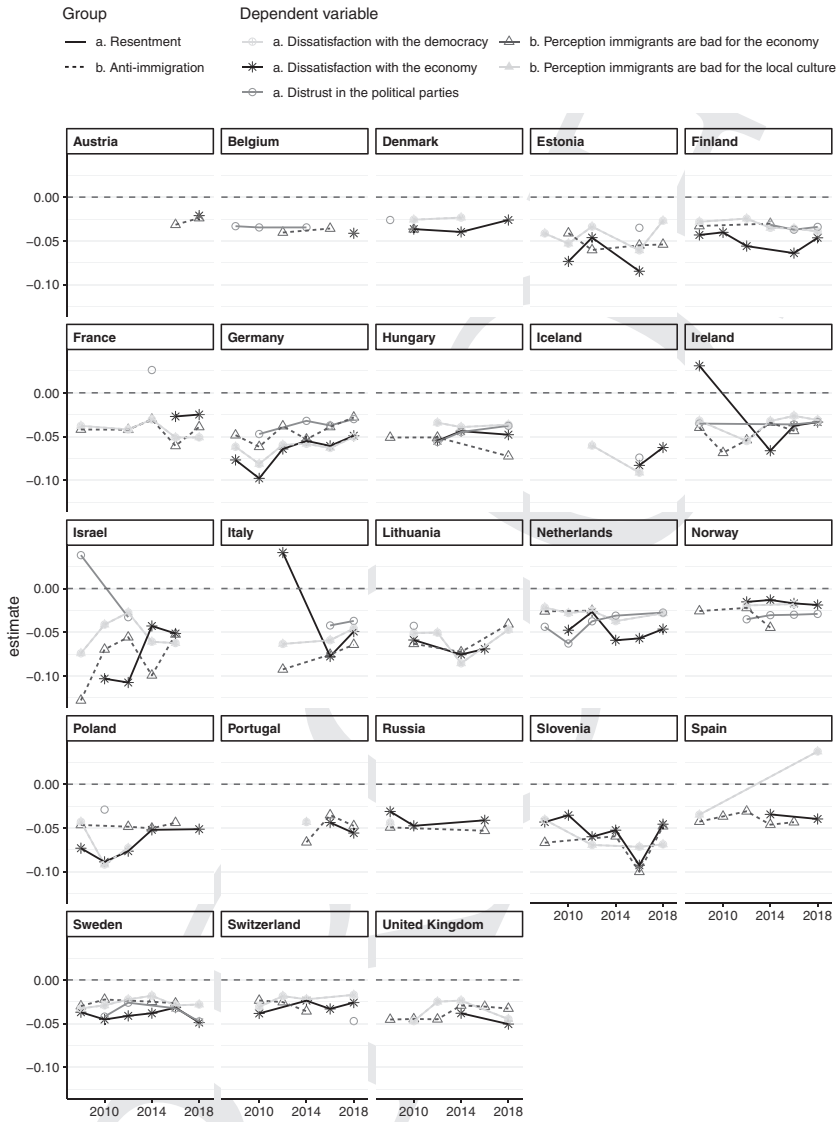
Group | Dependent variable

— a. Resentment
--- b. Anti-immigration

a. Dissatisfaction with the democracy | b. Perception immigrants are bad for the economy
a. Dissatisfaction with the economy | b. Perception immigrants are bad for the local culture
a. Distrust in the political parties

FIGURE 6.2 Association between Household Income on Anti–Immigration and Resentment

evaluate the time-trend of the indirect effect. As the figure shows, the indirect effect of income becomes more negative over time. Substantively, it means that as household income increases, it reduces support for RWP because it reduces resentment of the status quo and perceptions that immigrants represent a threat to the country. So, even though Figure 6.1 could suggest that household income does
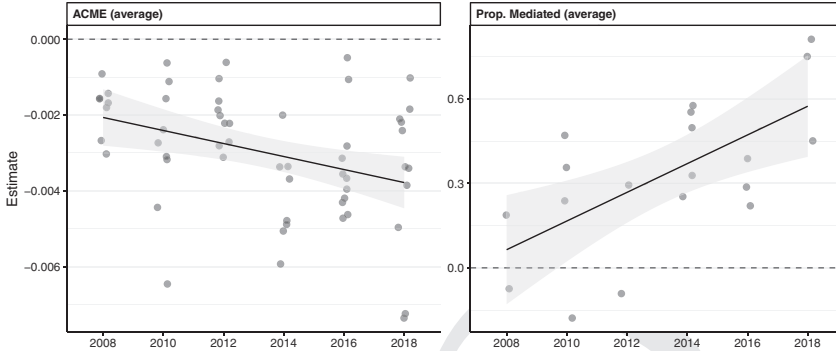
FIGURE 6.3 Average Causal Mediation Effect of Household Income on Support for Populist Parties, Mediated by Resentment and Perception that Immigrants Represent Economic and Cultural Threat (Left Panel); Proportion of the Total Effect of Income that Is Mediated (Right Panel)

not matter much when compared to other variables, Figure 6.3 indicates that it does matter, but it does so indirectly. Additionally, it indicates that the importance in terms of the relative magnitude of that indirect effect increased over time, on average, in some European countries.

The right panel of Figure 6.3 suggests the same conclusion. It compares the effect of income on RWP support that is *mediated* by anti–immigration attitudes and resentment against the total effect of income, mediated or not. The figure shows that the proportion mediated increased substantially over time. On average, around 10% was mediated by the channel discussed here in 2008, but that average was close to 60% in 2018. So it is expected that the association between income and support for RWP appears "irrelevant" once one controls for attitudinal dimensions, especially in recent years. But this does not mean that family-level economic conditions do not matter. They matter precisely because they affect those attitudes. The time–trend (x-axis in Figure 6.3) and within–year cross–country variation (y-axis in Figure 6.3), however, deserves full attention in future work on populist politics.

Final Discussion

Although the literature on public support for RWP has grown substantially in recent years, there are still many unanswered questions. This chapter discussed two of them. One is the separation between "endogenous" and "exogenous" elements of public support for RWP, in the sense that many recent fruitful attempts to explain the populist vote use explanatory factors that are not constitutive features (i.e., endogenous) of the concept of populism. Some examples discussed here come from the political economy literature, such as the effect of economic shocks

and anti-immigrant economic protectionism. These factors may increase RWP support, but I argued that they may do so because populists adopt other right-wing nationalist "host" ideologies, not because they are populists. Other explanations are more in line with the concept of populism as defined by some authors, such as the explanations from the political psychology and political behavior perspectives that emphasize the role of antipolitical elite sentiments and resentment toward the status quo.

The analysis presented here suggests that a productive venue for future research is a combination of these two perspectives and proper empirical approaches to the investigation of how economic and attitudinal dimensions are structurally related. Ignoring that relation can misguide empirical analysis. For instance, although the association of RWP votes with household income can become irrelevant when attitudinal variables capturing status threats are included as adjustment variables (Mutz 2018), it can be incorrect to conclude that household income is irrelevant. If it matters for RWP populist support indirectly as this chapter argues, by affecting attitudes and perceptions first, then it is incorrect to adjust for perceptions and attitudes when investigating the overall effect of micro-level economic conditions. Path or structural analyses that integrate micro- and macro-level economic conditions, common in the political economy approach, and attitudinal and behavioral variables, common in political behavior perspectives, can reveal patterns of association that would not emerge otherwise if those economic and attitudinal explanations were treated as competing and mutually exclusive hypotheses.

The analysis conducted in this chapter supports that argument. The results are preliminary, mostly exploratory, and I advise against any strong causal interpretation. There are probably confounders that need to be included and identification strategies are necessary for more rigorous analysis. Nevertheless, it is striking the empirical patterns that emerged in support of the argument proposed here and somewhere else (Ferrari 2021) of the mediation effect of threat perception and resentment, not to mention the indication of the increasing importance of such a mechanism over time in some European countries. It suggests, again, that a productive venue for research is the investigation of the connection between material conditions and perceptions, and how that connection affects attitudes and behavior.

It is important to notice that nothing in the argument I presented here allows us to conclude that only the low-income are anti-immigrant and RWP supporters. The only thing we can conclude is that preliminary evidence supports the argument that household economic conditions help to explain RWP support *in part because* it affects the attitudinal dimensions, in particular resentment of the status quo, dissatisfaction with the economy and political parties, and perceptions that immigrants represent a cultural and economic threat. Nothing in the argument says that affluent populations do not have those attitudes and support RWP because of them. It only says that economic hardship can trigger those attitudes. This explanation is aligned with recent research that shows the effect of economic

shocks on right-wing support (Baccini and Weymouth 2021; Hays, Lim, and Spoon 2019). Although factors such as race can influence the attitudinal effect of economic shocks (Baccini and Weymouth 2021), we shouldn't expect that affluent populations are affected by them in the same way.

Notes

1 See, for instance, the concept of populism discussed in Worsley (1969) and other authors in that volume and how it contrasts to recent volumes on the same topic, including this one, but also others such as Kaltwasser et al. (2017) and Ostiguy, Panizza, and Moffitt (2020).
2 Nomenclature of Territorial Units for Statistics (NUTS) is a geographic division developed and regulated by the European Union. Currently, there are three different levels of aggregation, and sociodemographic statistics and survey data are available in different sources at different levels. See https://ec.europa.eu/eurostat for more information.
3 For a similar perspective, see Hays, Lim, and Spoon (2019). They have a similar argument, but their mediators are mainly xenophobic beliefs.

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7

VOTING FOR VIOLENCE

The New Middle-Class and Authoritarian Populist Presidents in the Philippines and Brazil

Cecilia Lero

Introduction

In May 2016, Rodrigo Duterte, a longtime provincial mayor with almost no national experience, was elected president of the Philippines on a campaign that emphasized two messages: (1) that he was different than traditional, corrupt politicians, and (2) that he would take back the country for "good" citizens by slaughtering scores of criminals and drug users. In October 2018, Jair Bolsonaro, a longtime congressman without any notable legislation, was elected president of Brazil on a campaign that emphasized three messages: (1) that he was different than traditional, corrupt politicians; (2) that security forces and "good" citizens must forcefully take back the country from criminals and drug traffickers; and (3) that he would protect conservative, Christian values.

The current wave of political parties and leaders referred to as far-right, populist, authoritarian, illiberal, or extreme-nationalist, has piqued interest across the globe. Studies in the Global North point to xenophobia as a result of immigration, unemployment, and growing inequality as a result of globalized economies, and generational cultural backlash as the major explanatory factors for this wave of politicians. Yet, countries in the Global South, and the Philippines and Brazil, in particular, have not had recent large waves of immigration or notable demographic shifts and have experienced real income growth across all classes over the past 15 years. Furthermore, young voters supported Duterte and Bolsonaro at rates similar to or higher than older voters. How, then, can we explain the turn to authoritarian populists in two countries previously considered relative success stories of democratization in their respective regions, especially two authoritarian populists with remarkably similar, violence-based campaign messages and personal images?

This chapter argues that an important factor to consider when trying to understand how these two seemingly unlikely national leaders came to power is the "new middle class." A combination of rapid and unequal economic growth and state structures and policies in the Philippines and Brazil led to the development of this class characterized by fear and frustration along four dimensions. First, this new middle-class identity is largely defined by aspirational consumerism. This class has enough disposable income or access to credit to purchase valuable consumer goods but is still too economically insecure to replace those goods in the case of their loss, making them especially sensitive to crime. Second, this new middle class is paying income tax for the first time, making it more sensitive to government ineptitude and corruption. Third, foreign travel means that the new middle class is more likely to have experienced the quality of life in developed countries, making it even more frustrated with problems of order and basic service provision. Fourth, as economic growth through finance capitalism and foreign direct investments was extremely lucrative for the rich, and states adopted programs to deal with extreme poverty, the new middle class felt excluded. These frustrations, combined with the limits of the weak Philippine and Brazilian states and reformist but not transformational governments, helped drive this new middle class to support anti-system candidates espousing simplistic solutions centered around violence.

Concepts: Populist, Authoritarian, and Right-Wing

By referring to Duterte and Bolsonaro specifically as *populist* and *authoritarian*, I begin with the concepts as articulated by Norris and Inglehart (2019; see Molyneux and Osbourne 2017; Werner-Müller 2016). I treat populism not as an ideology, but rather as a rhetorical style characterized by two dimensions. First, populist leaders present themselves as anti-elite and anti-establishment. Second, populism claims that "the people" are the only source of legitimate political and moral authority superior to institutional rules, or scientifically established facts.

Authoritarianism is a set of values that places the collective security of "the tribe" above individual autonomy and rights. It has three dimensions. The first dimension is an overarching concern with security against "risks of instability and disorder." The second dimension is the need to conform. While Norris and Inglehart attach the need to conform to the preservation of conventional traditions, I imagine it has more to do with adhering to the common identity of the "tribe" in juxtaposition to the "other." Thus, while both Duterte and, to a greater extent, Bolsonaro certainly promote the traditional image of the strong, macho man, the more obvious pressure is to conform to the image of the "good, law-abiding" citizen as opposed to the "bad" criminal. The third dimension is the need for loyal obedience to a strong figure that protects the tribe.

An important facet when populism and authoritarianism combine is that the strong leader/protector is portrayed as the only legitimate representative of "the people." It follows, then, that authoritarian populist leadership can also be

characterized by (1) hostility to pluralism; (2) illiberalism – the willingness to restrict the rights of political opponents and minority groups; and (3) disregard for democratic institutions and norms that act as mediators of the direct exercise of the "people's power," which is embodied by the leader (Diamond 2019; Levtisky and Ziblatt 2018; Müller 2016). This style encourages a Manichean approach to political life, where everything is simplistically regarded as either absolutely good or absolutely bad.

In addition to being populist and authoritarian, I characterize both Duterte and Bolsonaro as right-wing. While Bolsonaro sits more classically in the socially conservative camp, Duterte has been opportunistic. Duterte, for example, has claimed to support gay marriage and then later recanted his support; personally identified with the Muslim minority, only to attack them after the armed siege of a majority-Muslim city by an extremist group; and viciously attacked the Catholic church, but only after some Church leaders expressed concern over human rights violations. While Bolsonaro has openly expressed pro-market ideals and Duterte has made some statements about increasing wages and controlling oligarchs, both presidents have openly stated that they do not understand economics, and accordingly put their full faith in neoliberal economic managers. While they responded differently to the COVID-19 pandemic in important respects (with Bolsonaro denying its gravity outright and Duterte at first denying its gravity, then instituting harsh lockdowns), both administrations have left testing and vaccination to be primarily the task of the private sector or local governments, with the national government taking little responsibility. Both Duterte and Bolsonaro quite blatantly do not include social and economic equality as goals of their administrations and, as will be described later in this chapter, their rhetoric is as anti-poor as it is anti-elite.

Existing Explanations for Authoritarian Populists

The major existing explanations for this current wave of authoritarian populists can be categorized into two groups. The "losers of globalization" argument states that globalization and technological advancement have fundamentally reshaped the nature of employment and migration. This, in turn, has led to economic insecurity and xenophobia as swaths of the population experience unemployment or flat to negative real income growth. Quickly changing demographics brought about by immigration and refugee waves have exacerbated xenophobic fears. Furthermore, the growing influence of supranational bodies and international standards and regulations made voters feel that existing political parties did not represent them and that too many rules affecting their daily lives were made by "faceless" bureaucrats in Brussels or Geneva (Berman and Snegovaya 2019; Diamond 2019; Spruyt et al. 2016; Stiglitz 2019; Rodrik 2018). The "cultural backlash" argument posits that as societies become wealthy, new generations become less concerned with material security and more concerned with post-materialist and socially

liberal values. As more of the population is characterized by post-materialist values, society reaches a tipping point where those adhering to old values begin to feel threatened, and engage in backlash (Norris and Inglehart 2019).

Yet, these theories are specific to the Global North. Under globalization, the Philippines and Brazil have not undergone recent waves of demographic change, and both countries are net providers of migrants, not recipients. While their economies have shifted toward services, the majority of jobs are still low-skilled, as opposed to the knowledge-based economies that have taken root in the Global North. Furthermore, while real wages in several countries in the North have stagnated or fallen (Richter 2015; Schulten and Luebker 2017), real wages in the Philippines and Brazil have dramatically increased. Even considering the dip in wages resulting from the 2015–2016 recession, by 2018 Brazilians were earning the same as they had been before the recession, albeit with higher levels of unemployment (*The Economist* 2015).

Cultural backlash theory is also intended to apply to wealthy countries. Nevertheless, we do observe some backlash against progressive identity values in the discourse of Bolsonaro, who vociferously claims to be a defender of traditional Christian and family values. Bolsonaro also has a history of anti-Black, anti-LGBTQIA+, and misogynist statements, which were celebrated by a vocal contingent of his supporters during the campaign. While Duterte has had a more opportunistic approach to his treatment of the Catholic Church, LGBTQIA+ issues, and ethnic and religious minorities, his unapologetically misogynistic nature and the cultivation of his image as a "strict father" also recall traditional conservative Philippine values.

Yet, there is substantial dissonance between what cultural backlash theory predicts and what we observe in the Philippines and Brazil. Cultural backlash theory predicts that the more highly educated and the young are more likely to hold socially liberal values and will exhibit less support for authoritarian populists. This was not the case in the Philippines nor in Brazil. On the contrary, higher levels of education were positively correlated with support for Duterte and Bolsonaro. About 49.2% of voters who had some graduate education indicated voting for Duterte in exit polls, compared to 38% of the overall voting population (Teehankee 2016). Similarly, polls indicate that Brazilian voters with college and high school educations supported Bolsonaro over Haddad by 20- and 16-point margins, respectively. On the other hand, voters with elementary education supported Haddad over Bolsonaro by a six-point margin (O Globo 2018).

Younger voters were also more likely to vote for Duterte. Exit polls indicated that Duterte had higher vote leads among younger voters (ABS-CBN News 2016). The relationship between age and support for Bolsonaro is less clear. Survey results put Bolsonaro and Haddad at a statistical tie among 16- to 24-year-olds, Bolsonaro was consistently favored by about approximately ten points by voters 25–54, and Bolsonaro was favored by 17% among voters over 55 (Figure 7.1). This is far from the overwhelming pattern found for generational variance in the Global North.
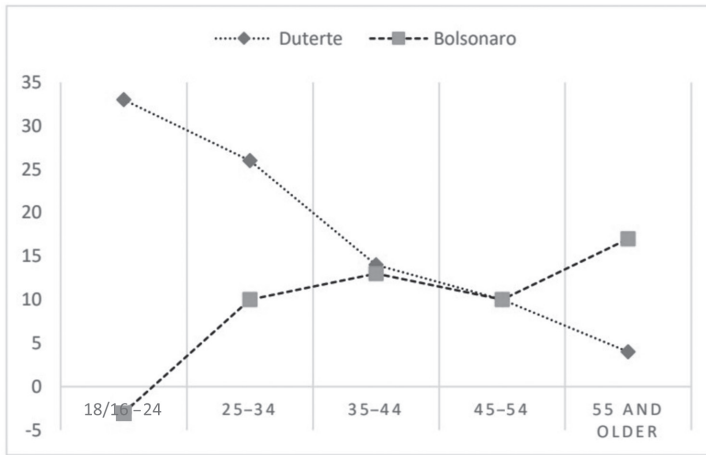
Note: In the Philippines the voting age is 18 and in Brazil it is 16 (it is voluntary at 16, mandatory at 18).

FIGURE 7.1   Duterte and Bolsonaro Vote Leads by Age Group

Explaining Duterte and Bolsonaro: The Role of the "New Middle Class"

Populist leadership styles are not new in the democratic periods of either country, with presidents Joseph 'Erap' Estrada (1998–2001) and Luiz 'Lula' da Silva (2003–2011) representing forms of populist performative styles that built on feelings of anger with and alienation from cosmopolitan elites and promises to value and include the poor and traditionally marginalized in mainstream society. Duterte and Bolsonaro, however, distinguish themselves because their forms of populism are based around the logic of *exclusion*. The enemy of the people is not limited to the "elite." Rather, the more fundamental, visceral enemy is the "'*bandido*' (thief) that could be lurking around the corner or threatening to move in next door" (Evans 2020). Disgust with the elite stems from the perceived hypocrisy between elite social norms of "decency" and political correctness on one hand, and the obvious corruption and exploitation while failing to protect the people from the "*bandido*" on the other (Garrido 2017; Solano and Rocha 2022). Thus, the opportunity arises for a leader that eschews cosmopolitan values and mannerisms while promising to exclude, even via eradication, the "*bandido*" from society.

The dramatization of the "*bandido*" character is rife with classist and, in Brazil, racist undertones. As the mayor of Davao City, Duterte earned a reputation for employing death squads to eradicate petty criminals. As both a candidate and president, Duterte's unwavering target has been users of methamphetamine, the drug used primarily in poor communities. As president, Duterte admitted that his so-called "war on drugs" goes after the poor because methamphetamine is

supposedly worse than heroin or cocaine, which are more prevalent among the rich. The constructed image of the true social menace was not the corrupt politician nor the exploitative industrial baron. Rather, it was the young urban slumdweller dressed in flip-flops and basketball shorts.

Similarly, the image of the "*bandido*" that Bolsonaro has cultivated is that of the poor black man. Bolsonaro and his family are known to have connections to *milícia* (militia) groups in Rio de Janeiro that stylize themselves as security forces that combat drug trafficking organizations in communities comprised overwhelmingly of poor, black youth.[1] Among Bolsonaro's most avid campaign promises for dealing with crime was to allow "good" civilians to carry firearms in order to fend off street criminals as well as property "invaders," a reference to the social movement tactic of land occupations to gain housing. He also actively disparages black and poor people's cultural practices, including funk *carioca* music, *samba*, *carnaval*, and Afro-Brazilian religions as being markers of immorality connected to crime.

Although "*bandido*" elicits a particular trope, its malleability as a concept also means that it can opportunistically be extended to anyone. Whoever sympathizes with the "*bandido*," including human rights workers and civil society activists, become "*bandidos*" themselves. Society becomes simplistically divided into the "good" and the "bad citizens" and those who exhibit characteristics emblematic of "bad citizens," including those coming from the same communities and socioeconomic classes, need to show that much more rage and disgust in order to be perceived as "good." In this way, Duterte and Bolsonaro encourage self-loathing among the poor and lower middle class as a form of demonstrating upward social mobility and desirability.

A key aspect of both Philippine and Brazilian societies that has been overlooked is the role of the "new middle class." Both the Philippines and Brazil experienced rapid economic growth in the 2000s and early 2010s that changed the value and distribution of real incomes. Between 2001 and 2016, the Philippine gross domestic product (GDP) more than tripled and between 2006 and 2015, real income for the bottom half of the country increased by an average of 50% (FIES 2015; 2006). Between 2003 and 2013, Brazil's GDP grew by 64%, extreme poverty was cut in half, and the minimum wage increased by 75% in real terms (Costa and Motta 2019). In 2010, Neri wrote that the millions of people that rose out of poverty in Brazil comprised a "new middle class" – an idea reiterated and promoted by the Rousseff government. A similar, albeit less dramatic movement out of poverty and into the ranks of the lower middle class, was also observed in the Philippines during roughly the same period (Table 7.1).

For the purposes of this chapter, I understand the "new middle class" to be those that have risen out of poverty and joined the ranks of the lower middle class, gaining access to disposable income in the last two decades. The new middle class tends to be characterized by precarious work with low pay and little access to social safety nets (Braga 2012). The Brookings Institute also emphasizes access to discretionary income as a factor that characterizes the middle class in a way

TABLE 7.1 Changes in Income Distribution by Class

Philippines

	2006	2015
Upper Middle Class	4	4
Middle Middle Class	10	10
Lower Middle Class	57	63
Poor	27	22

Brazil

	2002	*2015*
Upper Middle Class	7	9
Middle Middle Class	11	15
Lower Middle Class	29	44
Poor	52	33

that can be more conceptually useful than strict income categories, particularly in comparative studies:

> While acknowledging that the middle-class does not have a precise defin-ition that can be globally applied, the threshold we use…has the following characteristics: those in the middle-class have some discretionary income that can be used to buy consumer durables like motorcycles, refrigerators, or washing machines.
>
> *Kharas and Hamil 2018*

While I do not claim that the emergence of the new middle class is the *most* important factor contributing to the elections of Duterte and Bolsonaro, it is an important and interesting factor worth analyzing for several reasons. First, the sheer size of the lower middle class makes it an influential force. Second, the only significant variation in class structure observed in recent years is this movement from the poor to the lower middle class. Finally, the new middle class's support for Duterte and Bolsonaro presents a theoretical puzzle. It appears counterintuitive that a social class that benefitted substantially from liberal democratic regimes would support anti-system candidates that represented the violent rejection of those very regimes.

There is a clear link between income class and voter preferences. In general, wealthier voters supported Duterte and Bolsonaro at higher rates (Table 7.2). However, the lower middle class, whose ranks have been swelled by the expan-sion of the new middle class as described above, was arguably the most substantial driver behind their victories given its size as well as its active participation in the two campaigns (Bello 2019).

TABLE 7.2 Income Class and Lead Over 2nd ~~Placing~~ Candidate

Duterte	
Class ABC	26
Class D	17
(*lower middle and working classes*)	
Class E	7
Bolsonaro	
More than 10x the minimum wage	29
5–10x the minimum wage	32
2–5x the minimum wage	23
(*lower middle and working classes*)	
up to 2x the minimum wage	−10

How can we explain the new middle class's active support for these two right-wing authoritarian populist candidates? I argue that this new middle class is characterized by four factors that make it vulnerable to messages of drastic, anti-systemic change and authoritarian citizenship. These four factors are (1) class identity based on consumerism, resulting in unprecedented sensitivity to the threat of crime; (2) tax-paying, often for the first time, resulting in unprecedented sensitivity to government ineptitude and corruption; (3) the ability to travel abroad, resulting in more frustration with problems of order and basic service provision; and (4) the feeling of exclusion from both the astronomical gains of the rich and social programs targeted toward the poor.

Class Identity Based on Consumerism and Sensitivity to Crime

The new middle class does not have an identity of its own – it aspires to be like the established middle class. This is key to understanding its behavior because ~~the~~ class is not just about income but also about values and identity. The weakened state of labor unions means that there is a lack of spaces and organizations where concerns particular to low-wage earners can be discussed and a class consciousness and identity of its own can be formed. At the same time, the augmentation of service–sector jobs means that the new middle class is more attuned to the tastes and values of the established middle class. The new middle class thus seeks to claim its social status and occupy spaces previously reserved for the established middle class through what Pinheiro Machado and Salco (2020) call "inclusion via consumption." We observe that increased access to disposable income and cheap credit has not resulted in sizeable increases in savings or investment, but rather in increased consumption. In the Philippines, despite real incomes increasing an average of 15% between 2012 and 2015, only a third of all households reported having any savings at all in the first quarter of 2016, an increase of only 8% from the first quarter of 2013 (FIES 2015; *Bangko Sentral ng Pilipinas* 2019). Similarly,
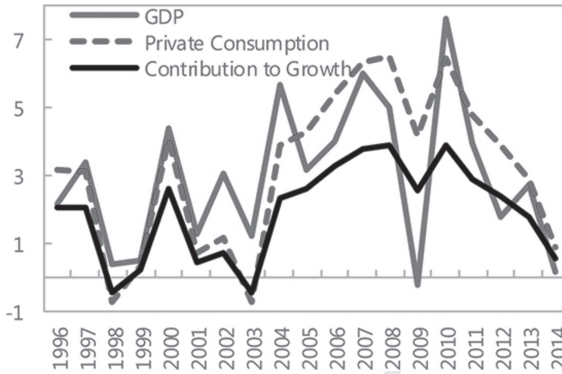
FIGURE 7.2 GDP and Consumption Growth in Brazil

FIGURE 7.3 Changes in Saving by Sector in Brazil (as a Percentage of GNI)

prior to the recession in Brazil, private consumption growth outpaced GDP growth (Figure 7.2). Meanwhile, household saving has been negligible or nega‑ tive (Figure 7.3). The case of vehicles, a classic marker of middle‑class status, is emblematic. Between 2007 and 2015, the number of passenger vehicles purchased in the Philippines more than tripled and the number of motorcycles and scooters purchased more than doubled (AFF 2019). In Brazil between 2001 and 2012, the number of motor vehicles in circulation more than doubled while the number of motorcycles in circulation nearly quintupled (Costa 2016).

Consuming goods and services previously perceived as unattainable makes the new middle class feel increasingly distant from poorer classes while they psychologically identify more with the established middle class. At the same time, the new middle class is *not* established. Whereas the established middle class can be relatively confident that in the case of an unforeseen negative shock, such as unforeseen medical needs or unemployment, that they will not fall back into poverty (Kharas and Hamil 2018), the new middle class still lacks this security. Furthermore, much of this consumption is fueled by newly acquired access to credit. The interest this credit accumulates adds to the threat of instability and a possible return to poverty should a shock occur (Dowbor 2018).

The loss of a car, cell phone, or computer may be substantial enough to be considered an economic shock to those just out of poverty. In the Philippines and Brazil, like many countries in the developing world, there is little trust that the police will be effective at protecting private property or finding and returning it in the case of theft. Despite this mistrust in the state security apparatus, the new middle class depends on it for protection, and so is particularly receptive to promises that the state will make drastic changes to address crime and safety, even if this means that the state would act illegally and violently toward suspected criminals.

Tax-Paying and Sensitivity to Government Ineptitude and Corruption

The new middle class also found themselves paying taxes, often for the first time. In both countries there has been a push toward labor formalization that, while potentially providing workers better access to benefits and protections, also subjects an expanded range of professions and workers to income tax. Brazil's Workers' Party governments (2003–2016) made concerted efforts to increase labor formalization: between 2002 and 2012 formal employment rose by 14% (ILO News 2014). In the Philippines, formal employment rose by only about 3% between 2008 and 2017. However, given the Philippines' high population growth rate, this 3% equates to approximately two million people.

Income taxes collected increased by nearly 25 times in Brazil from 2003 to 2013 and more than doubled in the Philippines from 2009 to 2016 (OECD 2019). The middle class paid for the brunt of this expanded tax base. In Brazil, the middle classes pay a higher effective tax rate than the rich (Gobetti and Orair 2017) and in the Philippines, nearly 70% of all Philippine income taxes are paid by the middle class (Albert, Santos, and Vizmanos 2018). Furthermore, while previous administrations sought to increase government revenue by expanding value-added tax, the Benigno Aquino administration (2010–2016) went after middle-class income tax evaders, through a "naming and shaming" campaign.

This new relationship with taxes made the new middle class especially sensitive to problems of government ineptitude and corruption. When citizens pay

taxes, they demand more from their governments (Martin 2016). Indeed, service provision in the Philippines and Brazil leaves much to be desired. An emerging new middle class that demands more and better services has added even more strain to service provision and management systems, and states have not been able to keep up (Heydarian 2017; Tehankee 2016). The established middle class and rich in these societies tend to turn to the private market, including private schools and hospitals, for basic service provision and as a marker of social status. The new middle class would like to do the same, but the cost burden is an obstacle.

Beyond mere government ineptitude and over-bureaucratization, corruption is a strong moral affront to tax-paying citizens. Both the Philippines and Brazil witnessed huge scandals shortly before the elections of Duterte and Bolsonaro that revealed the systematic nature of corruption in government. In July 2013, the "Pork Barrel Scam" investigation revealed that over US$190 million had been diverted to fake NGOs and then split between the creator of the NGOs and legislators (Francisco 2013). One million mostly middle-class protestors gathered in Manila's Luneta Park to express their outrage – the largest political demonstration since the 1986 People Power Revolution that toppled the Marcos dictatorship (Francisco 2013). The Aquino government faced immense public pressure to prosecute the erring legislators and abolish the budgeting mechanism that allowed it to happen. Its actions were disappointing. Only three out of the 23 congress people named in the report were charged by the Justice Department and jailed and the budgeting mechanism was not meaningfully changed. At the same time, the political opposition highlighted the selective prosecution and pointed to other discretionary spending mechanisms the government continued to enjoy. The message was that Aquino and the Liberal Party (LP) were not the corruption fighters they claimed to be. Rather, corruption and political vindictiveness were characteristics of all mainstream politicians. A few months later, Typhoon Haiyan hit the Philippines with devastating effects. The storm killed at least 6,300 people, displaced upwards of six million, and cost an estimated US$1.8 billion in damages. The government response was widely criticized as slow and uncoordinated, highlighting the state's lack of preparation and general incompetence, as well as accusations of corruption.

The role of "*anti-petismo*" (being against the Worker's Party) in Bolsonaro's electoral victory cannot be overestimated. Operation Car Wash began in 2014 and uncovered an intricate web of overpriced public contracts and bribes to politicians amounting to over US$5 billion. The scandal erupted on the heels of a wave of protests beginning in 2013 that started out as a movement for free and quality public transportation, but turned into a more general critique of the Rousseff government. The protests attracted a diverse array of participants, including many from the middle class and resurgent Right (Alonso and Mische 2017; Singer 2018, 112–114). An economic recession that began in 2014 further mobilized broad discontent. Selective media reports and prosecutions by an ideological group within

the public attorney's office helped to associate corruption with the Workers' Party in popular discourse, but the anger it generated spilled over to all political parties and the political system in general.

It should be noted that there is no cause to believe that either the Liberal Party under Aquino or the Workers' Party was more corrupt or inept than previous governments or competing parties. Yet, Duterte and Bolsonaro supporters seemed to regard the Liberal and Workers' Party regimes as disproportionately responsible for the corruption and poor services and governance that plague the two countries. It also seems that for the many Aquino and Lula voters who turned Duterte and Bolsonaro voters, the anticorruption and radically democratic images cultivated by the former resulted in feelings of deception when they could not live up to their promise. When the middle class has to pay taxes for public services that are poor or that they do not use, and for the money to ultimately be stolen through corruption, government is seen as something that limits, not facilitates, personal ascendancy (Singer 2018, 97). Anti-system candidates vowing radical change by radical means become more appealing.

The Ability to Travel Abroad for the First Time, Resulting in Frustration with the Perceived Lack of Order

The periods of rapid economic growth in the Philippines and Brazil, coupled with a drop in the cost of airfare, resulted in more accessible foreign travel. Sixty-five percent more Filipinos traveled internationally in 2016 than in 2010 and 36% more Brazilians traveled internationally in 2014 compared to 2010 (BRAZTOA 2019). The ability to travel abroad is a marker of economic and social status that functions to separate those who have traveled from the supposed poor and parochial that have not. As coined by writer Nelson Rodrigues, Brazilian society is plagued by a "*complexo de vira-lata*" (mutt complex) in which the Brazilian feels like a mutt without a positive identity who will always be inferior to the United States and Europe (Souza 2018a; 2018b). Filipino society can be characterized by the same complex. Members of the middle class desire to identify more with their North American and European counterparts than the poorer members of their own societies. It is openly questioned whether the "chaotic and undisciplined natives" have the capacity to live in a democracy.

The ability to travel abroad has given members of the new middle class a chance to interact with more developed and orderly states, thus fostering even more frustration with the failures of the Philippine and Brazilian governments. The concept of "order" calls special attention. Garrido (2020) demonstrates that in the Philippines, middle-class disdain for the poor comes in particular from the sentiment that things associated with poor communities like informal settlements, street vendors, and informal workers are a source of disorder and lack of discipline. Similarly, Souza (2018a) finds that in Brazil, middle-class culture values self-restraint and discipline related to traditional Ibero-Christian conservatism. Poor,

black, and indigenous people are looked down upon for supposedly lacking this restraint.

When Filipinos and Brazilians travel abroad, they tend to go to more economically developed, "orderly" societies, despite having countries at comparable or lower levels of development as neighbors. As of 2016, the top regional destinations for Filipino tourists were China (including Hong Kong), Malaysia, and Singapore. As of 2019, the top destinations for Brazilian travelers abroad were Europe and the United States. It is also important that the emergence of the new middle class in the Philippines coincides with an expansion in the number of overseas workers. The 1.9 million overseas Filipino workers in 2009 grew to 2.4 million in 2015, with over 56% working in the Middle East (PSA 2006a; 2015b; 2018). Thus, new middle-class experiences in more developed countries largely occurred in nondemocratic states with strict social discipline policies. The Duterte campaign actively cultivated relationships with overseas workers through social media, turning much of the overseas community into an online army that spread pro-Duterte propaganda and attacked supporters of other candidates (Ranada 2016).

Foreign residence and employment increased more dramatically and likely had a larger impact on new middle-class attitudes in the Philippines than Brazil. Data on the number of Brazilians residing abroad are unreliable: the 2010 census reports approximately half a million while the Foreign Ministry has reported estimates between two and three million annually from 2008 to 2015 (MRE 2021; IBGE n.d.). Nevertheless, Filipinos and Brazilians living and working abroad are similar in that they often act as a social reference, influencing friends and family back in their home country. While this may seem counterintuitive, as, people living in the country should have a better perspective of what they need, it reflects the aspirational character of the middle class as well as the inculcation of feelings of colonial inferiority in the two countries. Thus, those who work and live abroad have both economically derived authority and cultural authority in their personal circles. Duterte and Bolsonaro (2018 election) won 72% and 71% of votes cast by overseas residents, respectively (Rappler 2016).[2]

The Feeling of Exclusion from Benefits Enjoyed by Both the Elite and the Poor

Both the Philippines from 2001 to 2016 and Brazil from 2003 to 2012 pursued dual strategies of neoliberal macroeconomic policies geared toward satisfying private capital investment and the expansion of social services. In the Philippines, GDP growth under President Arroyo (2001–2010) was largely fueled by a global market friendly to commodity exports, the privatization of government holdings, overseas worker remittances, and a boom in the business process outsourcing industry. However, a series of corruption scandals eroded both investor and consumer confidence as well as programs' potential positive effects (Lim 2016).

Thus, the vast majority of the economic gains under the Arroyo presidency were limited to the already wealthy and well-connected (Asian Correspondent 2016). The subsequent Aquino administration opted to focus on reeling in corruption, expanding the tax base, and strengthening investor confidence. At the same time, the government expanded state spending targeted toward the very poor (Lero 2018; Lim 2016). Similarly, the economic policies of the first decade of Worker Party rule in Brazil were characterized by concessions to finance capital and massive increases in social spending. In 2002, then-candidate da Silva issued the "*Carta ao Povo Brasileiro*" (Open Letter to the Brazilian People), which was widely interpreted as a peace offering to the finance capital sector and a promise that he would not change the rules (Dowbor 2018). Until the 2010s, PT governments actively avoided conflicts with the financial sector. At the same time, the governments took an aggressive approach to spending on programs to combat extreme poverty, instituting 149 social and economic inclusion programs (Costa 2016; Sátryo and Cunha 2014).

As a result of these policies, extreme poverty fell in both countries, but the already wealthy were the big winners. Between 2009 and 2015 in the Philippines, the top 10% of families increased their incomes by more than the bottom 40% combined (FIES 2006; 2015). In Brazil between 2008 and 2017, the top 2% of families increased their incomes by more than the bottom 98% combined (IBGE n.d.).

The middle class found itself left out of both the social programs targeted toward the poor as well as the astronomical gains reaped by the wealthy (Teehankee 2016). The middle class is the least likely to support redistributive policies or unemployment benefits and it reports lower trust in government than mean trust across classes (World Bank 2020). It is not uncommon to hear middle-class complaints that conditional cash transfer programs will make the poor dependent and lazy, and socialized housing programs were met with strong middle-class opposition given the high costs of urban housing and the perception that low-income residential areas breed crime.

Why were so many in the new middle class critical of social inclusion programs targeted toward the poor when so many of them had only recently been poor themselves and achieved social mobility largely because of the opportunities created by governments' social programs and macroeconomic performance? In addition to their psychological affinity with the established middle class, both the Liberal and Workers' Party governments failed to construct a political narrative about the social and economic ascension of the popular classes (Nozaki and Souza 2017). Accordingly, perceptions around social mobility came to be framed by capitalist narratives of "meritocracy" (Souza 2018a, 140) and the self-serving bias, the psychological tendency to take credit for positive outcomes but blame the external situation for negative outcomes (Miller and Ross 1975).

At the same time that the middle class was complaining about social inclusion programs targeted toward the poor, it was paying for them at rates equivalent to or higher than the wealthy. An often-heard sentiment among the middle class in

both the Philippines and Brazil can be paraphrased as, "The rich are getting richer and the poor get handouts. Meanwhile, we just work and pay taxes." These feelings of exclusion and essentially being used by the state for the benefit of both the poor and the rich made the middle class receptive to the Duterte and Bolsonaro campaigns that simultaneously attacked the "traditional elite" and the "oligarchy" while playing up middle-class fears and stereotypes about the poor's supposed association with crime and lack of discipline.

Conclusion

Recent scholarship has abounded with studies seeking to explain the rise of authoritarian populist politics in the Global North. This phenomenon has largely been understood as the result of economic displacement and backlash against cultural changes. Seeking to understand this phenomenon from a Southern point of view, however, is important, as not only has the South experienced the major political and economic developments of the 20th and early 21st century in a way vastly different from the North, but also the South is exponentially more vulnerable to the damage that can be wrought upon democratic institutions by authoritarian populist leaders.

In this chapter, I have argued that we must look at the demand side of the equation, the drivers of popular support that allow such political leaders to take advantage of institutional weaknesses and further weaken democratic institutions from within. One such driver is a new middle class with particular fears and frustrations that make it vulnerable to violent, anti-system politics. This means that the rise of authoritarian populists is an unintended consequence of global macroeconomic development patterns.

Another important question that arises is why the extreme Right was able to capitalize on these anti-systemic frustrations while the Left did not. The effectiveness of exclusionary versus inclusionary messages combined with the more effective use of social media is certainly part of the story. Importantly as well, as the Right rode on and exacerbated these frustrations, the Left took a defensive position. Ethnographic research shows that in the face of bubbling frustrations, the Left is seen as overly bureaucratic. It speaks of piecemeal reforms, but as that reform has been slow in coming, this is functionally equivalent to defending the status quo. This message does not speak to the new middle class, who see themselves on the front lines of an immediate war marked by insecurity and danger, and thus drastic and violent rhetoric that promises to break the system is more directly relatable and appealing (Santos et al. 2022; Solano and Rocha 2022; Pinheiro Machado and Scalco 2020). This suggests that a new paradigm for development combined with a proactive democratic vision that aggressively addresses insecurity and alienation may be needed to reverse the further spread of authoritarianism and violence.

Notes

1   Although militias have created the image of having formed to combat the control of narcotraffic organizations over communities, research indicates that they initially formed to take financial advantage of the lack of basic services in informal settlements (Hirata and Grillo 2017).
2   N.E.: This pattern was however different in the Brazilian 2022 election both for the first and second ballots. For the second round, Lula was elected with 51.28% abroad, reflecting the overall results as well (Sullivan et al. 2022; Viggiano 2022).

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PART III

Institutions

8

POPULISM AND ANTI-GLOBALISM ON TWITTER

Similarities of Conspiratorial Discourse and Content Diffusion on Social Networks in Brazil, Spain, Latin America, and Italy

Anna Carolina Raposo de Mello and Felipe Estre

Introduction

In the last decade, far- and ultra-right leaders came to power, either by taking control of the executive or by building significant parliamentary coalitions in their legislative branches (Mudde 2019). Because of the common traits of their nationalistic, conservative, and illiberal platforms, these leaders have been as expressions of an emerging wave of far-right populism and have been considered a threat to liberal democracy worldwide (Levitsky and Ziblatt 2018; Mounk 2018; Runciman 2018,; Urbinati 2013).

Political leaders such as Donald Trump, Viktor Orbán, Narendra Modi, and Jair Bolsonaro, and prominent political parties or groups such as Vox (Spain) and the Lega (Italy) have accommodated the particularities of their respective domestic landscape to the populist opposition between people and elites (Chatterje-Doody and Crilley 2019; Laclau 2007; Manor and Crilley 2019; Mudde 2004).

As to their countries' international presence, while not assuming that populists' foreign policies are always "anti-plural, anti-democratic and anti-cosmopolitan" – a common notion challenged by Wehner and Thies (2020) – we find that contemporary far-right populists seem to share similar anti-cosmopolitan identities, reject international institutions and stand as advocates of the re-establishment of conservative values, amidst a narrative dispute that has been portrayed as a global war (Biegon 2019; Bos et al. 2013; Meléndez and Kaltwasser 2017; Steger 2008). These homogeneous traits are consistent with the idea that far-right populists project similar domestic stances in ideology, politics, and economic policy into the international sphere (Wehner and Thie 2020, 14). The international dimension of far-right populism is therefore based on a common set of domestic standards, shared by populist leaders in spite of their respective homegrown particularities

(Chryssogelos 2010; Verbeek and Zaslove 2018). In some cases, side-by-side with the defense of sovereignty and autonomy, conspiracy theories emerge within populist discourse (Chatterje-Doody and Crilley 2019; Guimarães et al. 2020).

The term "globalism", recently made popular by far-right supporters and even included in the official speech of foreign policy leaders (Guimarães et al. 2020), synthesizes the expression of this common set of standards and identity traits while adopting a conspiracy theory – or an assemblage of multiple, interconnected conspiracy theories about the hidden mechanisms of the international system. This term – globalism – represents and condenses what self-declared patriots and conservatives of the far-right see as the gravest threat to nations in the international sphere. Globalism and the fight against it should therefore be the main objectives of ultraconservative foreign policy. Far-right populists rely on the support of this electorate worldwide and are likely to adapt their foreign policy discourse – if not their policies, ultimately – to accommodate this set of beliefs.

The incorporation of conspiracy theories in foreign policy hence emerges as a phenomenon worth studying, raising questions as to their narrative power and the pragmatic gains they bring to far-right populism. Have conspiracy theories become a frequent (defining, even) feature in far-right populism's foreign policy narrative? How and why is conspiratorial discourse beneficial to populist leaders? We are conscious of the presence of conspiracy theories in the political debate throughout the 20th century, with vivid examples of their use for narrative-building during the Cold War, for instance, when the left and the right mutually accused each other of the most atrocious acts of infiltration into each other's realms. Nevertheless, the contemporary use of conspiratorial narratives and the creation of imaginary foes at the core of political leaders' foreign policy conceptions might have significant political consequences and thus deserve an examination that differentiates between current and past phenomena.

Globalization – and globalism in its non-conspiratorial sense – have been under strain in the 2010s and 2020s. Still, the criticism of and backlash against the social, economic, and environmental effects of a globalized world, as well as the acknowledgment of an ongoing crisis, are by no means comparable to anti-globalism in its conspiratorial form. This side of the phenomenon does not suggest a logical assessment of the shortcomings of globalization; instead, it attributes the fault of these shortcomings to occult and mischievous forces secretly operating behind the façade of a profoundly globalized and multipolar international system, whose order still inevitably relies on interdependence. As far-right populists embed their foreign policy discourse in conspiracy theories, potentially instrumentalizing foreign policy to domestic mobilization, their foreign policy actions may change the global landscape.

In order to contribute to a better understanding of this phenomenon, this paper seeks to verify whether and how the term "globalism" [in Portuguese, Spanish, and Italian, "*globalismo*"] was employed by populist leaders and their supporters

on Twitter – a platform regarded as politically influential, as it aggregates mobil‑
izing themes from the public debate and is densely populated by political actors,
journalists, and opinion influencers of all sorts (Jungherr 2016; Rossini et al. 2018;
Rossini, Stromer‑Galley et al. 2018).

We monitored Twitter to verify the scope, form, and content of this particular
online debate. By monitoring tweets that refer to globalism, we expected to iden‑
tify common traits of a foreign policy narrative shared by populist leaders and
supporters and observed how it is taken up online by members of far‑right user
communities and environments (Bartlett et al. 2012). Limiting ourselves to the
linguistic universes encompassing the word "*globalismo*", we found references to
globalism and foreign policy much associated with the conspiratorial side of the
anti‑globalist stance in Brazil, Spain, and Italy, as well as in some Spanish‑speaking
Latin American countries.

The analysis revealed the uniformity of speech in terms of themes and rhet‑
orical resources but highlighted the differences in terms of the size and diversity
of the networks in each country or linguistic universe. This chapter is based on the
hypothesis that the conspiratorial anti‑globalist discourse is uniform, transnational,
and consistent, and that it finds on social media a fertile ground for diffusion and
a suitable, direct channel of mediation between populist leaders and the people.
It identifies constitutive aspects of these foreign policy narratives on Twitter, ana‑
lyses their scope and reach, and seeks to answer how the dissemination of this dis‑
course on the platform contributes to the affirmation of foreign policy identities
common to far‑right populism.

Despite originating from different political and social contexts in each country,
the tweets analyzed here have common features. Regardless of their country of
origin, all observations that compose our database are original tweets that have
overcome the engagement threshold of 100 retweets; the outstanding majority
(with very few exceptions) employ the terms associated with globalism within an
identical semantic field: the conspiratorial conception that attributes the alleged
destruction of national sovereignty and traditional values to multilateralism, inter‑
national institutions, financial elites, and the political left. In that sense, globalism
comes across as an antonym of patriotism.

The common defense of patriotism has paradoxically generated a global net‑
work of its own, with anti‑globalists exchanging support beyond borders and
commenting on the political stances of their counterparts abroad. This anti‑
globalist ecosystem relies on the vagueness of the term globalism to oppose and
denigrate their elected enemies, while it creates identification between far‑right
supporters and connects them with their self‑declared Christianity, conservatism
and anti‑leftism either through the content of the tweets or the choices of words,
imagery, and symbols present in the profile description of their authors.

While these similarities in themes and rhetorical resources – catchphrases
and expressions – are striking and ubiquitous, the patterns and reach of the anti‑
globalist discourse vary from country to country. A comparison between the

different linguistic universes highlights Brazil as an outstanding terrain for ana-lyzing the quantitative aspects of digital debate involving globalism as conspiracy theory. While Spanish-speaking countries have produced debates more highly concentrated around few and prolific influencers, and Italy has presented a low incidence of engaging tweets, Brazil has had more numerous tweets and a larger variety of influential authors during the monitored period.

Anti-Globalism: From Populist Foreign Policies to Conspiracy Theories

Conspiracy theories may appear in political narratives at the service of any given ideology, but they have not been particularly associated with populist discourse, nor have we found scholarly work whose definition of populism is supported by the employment of conspiracy theories. The elaboration of an idealized notion of "the people" and its constant mobilization against an equally ethereal "elite" pre-scind the employment of conspiracy theories. On the contrary, conspiracies are somewhat internally coherent narratives that differ from the "empty signifiers" – vague and unspecified concepts which enable populists to aggregate support from different and diverse social segments (Laclau 1990). Still, in the particular case of contemporary far-right populism, the conspiracy theory of globalism appears to be a recurrent tool in foreign policy narratives – one that helps leaders establish the "us and them" divide (Biegon 2019).

In an effort to address the existing gap in the literature on populism, which has yet to explore the analytical connection between far-right populism and con-spiracy theories, Guimarães, Dutra, Moreira, and Mello (2020) have observed the use of conspiracy theories by far-right populist governments as they enact their foreign policies. Taking the Brazilian case as an example, the authors have illustrated how a "pathological political ethos" has managed to warp the discur-sive cohesion of foreign policy with the deliberate insertion of a conspiratorial narrative. In Brazil, this insertion is centered on electing "globalism" as the enemy's expression, which represents all evil and threatens the "true" nation.

In this context, the term globalism has been employed in its conspiratorial form, referring to a plot devised by leftist governments and international organizations to take up the whole world as their own sphere of political influence, seeking to obliterate Western, conservative values, creating a "new world order". Besides reshaping Brazilian foreign policy discourse to fit globalism into the official speech, political actors, along with the prolific support of pro-government social activists, have used social media to spread the anti-globalist conception. The former Foreign Minister of Brazil Ernesto Araújo (2019–2021) and federal congressman Eduardo Bolsonaro – one of the Jair Bolsonaro's sons – frequently tweet about the need to fight globalism, but often have to emphasize the distinction between the term *globalism* and *globalization*, so as to accommodate the liberalization of markets and international trade in their narrative. Aiming at clarifying those boundaries and

providing credibility to their perspective, their posts, as well as those from other government officials, aim to express what it means to be a globalist and, most of all, an anti-globalist (see Bolsonaro 2029; Araújo 2019).

Departing from the widespread conspiratorial employment of globalism under Jair Bolsonaro's administration by both foreign policy actors and its online supporters, we sought to verify whether this particular definition and use were perceivable in linguistic universes other than Portuguese and prevalent in online debates. While the monitoring of tweets initially sought to retrieve words in the Portuguese form "*globalismo*", it found morphological equivalents in Spanish and Italian.

We found it to be a semantic equal as well: our analysis shows globalism employed as a conspiracy theory at the center of the populist foreign policy narrative among far-right political actors and supporters. Focusing on Twitter users communicating in Spanish, we found substantial evidence of the anti-globalist discourse in line with populistic foreign policy narratives in Latin America, particularly in Venezuela, Chile, Colombia, and Spain prominently, with messages revolving around the Vox party official Twitter profile. Common features of the construction of an ultraconservative foreign policy identity can be seen in the speech of these advocates. This identity set, used by populist leaders aligned in a fight against ideological rivals, is actively diffused as it spreads on social networks through conspiracy narratives based on anti-globalism. Based on the hypothesis that the anti-globalist and conspiratorial discourse is transnational, uniform, and consistent with the given political field (Biegon 2019), this work identifies constitutive aspects of these narratives on Twitter, analyzes their scope and reach, and seeks to answer how the dissemination of this discourse on the platform contributes to affirm relatable foreign policy identities.

Arguments, premises, and discursive strategies were identified that point to a strong similarity between, and even some unity, the foreign policy identities disseminated by ultra-right supporters operating in the three observed linguistic universes. In the three cases, pillars of the ultraconservative foreign policy conception are found: anti-globalism, sovereign rhetoric, and ideological enmity, presented in response to the globalist conspiracy. Although this narrative is not always explicitly endorsed by leaders, it condenses elements of the set of values that guides the identity they seek to establish at the international level, and finds in social networks adequate means for its wide dissemination (Bartlett et al. 2012; Kim 2015; Mazzoleni 2014; Moffitt 2016; 2019).

By incorporating identity sets that insert them in the ultraconservative field, far-right populist leaders seek to establish anti-globalist, sovereign, and belligerent identities for their respective countries, redefining their insertion in the international system. If comparing them can elucidate a transnational trend of common and simultaneous employment of elements related to the ultraconservative identity, tracing their mechanisms of diffusion through networks and the dimension of their support on digital platforms can, in addition, contribute to a better

understanding of the engaging power of conspiratorial and anti-globalist narratives at the present time.

Brazil as Point of Departure

Following Ernesto Araújo's inauguration as Minister of Foreign Relations on January 2, 2019, Brazil's official foreign policy discourse began, for the first time, to allude to globalism as a threat to national sovereignty and the country's "inbred conservatism and Christianity" (see Guimarães et al. 2023). The concept has since been employed in a conspiratorial fashion, alluding to a supposed plot devised by global elites, allegedly working to undermine Western, Judeo-Christian values through cultural Marxism and global governance (Guimarães et al. 2020; Guimarães and Dutra 2021).

Parallel to this visible shift in Brazilian foreign policy discourse, the presence of foreign policy officials on social media platforms stood out, particularly on Twitter, as did the debate about foreign policy issues (Mello 2019). In order to verify whether the online debate on Brazilian foreign policy incorporated the novel anti-globalist rhetoric, we began monitoring tweets including the word "*globalismo*" (globalism), and its main derivations "*globalista*" (globalist) and "*globalistas*" (globalists).[1] Our initial objectives were first to see if the words appeared in foreign policy–related Twitter content; second, if they alluded to conspiracy; third, to understand what shape, if that were the case, the anti-globalist discourse took in these social media interactions.

To ensure the most comprehensive and unrestricted overview of the globalism-related debate on Twitter, we refrained from applying any geographical or linguistic filters to the established search parameters. The absence of filters resulted in a collection of tweets written in languages other than Portuguese, with which the word "*globalismo*" shared the same spelling and meaning: 99.14% of the overall results corresponded to Portuguese (49.51%), Spanish (45.51%), and Italian (4.12%).

Debate Monitoring and Network

From January 24, 2020 to July 21, 2020, we employed the monitoring software Netlytic, setting collection parameters with the words "*globalismo*", "*globalista*", and "*globalistas*" to capture all Twitter posts containing those words. Each observation was accounted for as a *single* tweet. Those messages were either original tweets, written first-hand by the author, or retweets of original messages by other users.

The number of retweets of an original message is one of the forms of interaction in the platform's visible feed. Together with likes and replies, retweets indicate the level of user engagement with a certain content.[2] As they become numerous,

retweets, likes, and replies are likely to increase an original tweet's exposure, enabling a message to reach more users for a longer time. Although retweets do not necessarily mean endorsement of an original post from users who retweet it, they are useful indicators of network mapping, showing clusters and user affinities around a given debate. More importantly, still, retweets indicate the predominance of textual aspects in a given debate: they are textual repetitions that, when contrasted with all single tweets, indicate debate concentration around certain elements of discourse. Therefore, to assess the predominant discursive elements in the debate about globalism in Portuguese, Spanish, and Italian, we sought to analyze the most popular content in each language, setting an inductive threshold of at least 100 tweets of original messages. These original, engaging messages then formed three sets of tweets – one for each language – later analyzed for their content and discourse.

In the six-month monitoring period, a total of 1,016,996 single tweets mentioning globalism were collected, presented in Figure 8.1. Out of these 1,016,996 single tweets, 503,472 (49.51%) were written in Portuguese, 462,885 (45.52%) in Spanish, and 41,874 (4.12%) in Italian. The remaining 8,765 tweets were either attributed to other languages or classified as undetermined. They were not considered in the analysis.

The most relevant original tweets in each language were selected under the criterion of a number of retweets. Only 1,307 original tweets were tweeted 100 or more times. Still, their repetition unfolded in 501,892 single messages, corresponding to 49.35% – nearly half – of the overall debate (see Table 8.1). Such an intensely concentrated debate indicated that interactions focus on few but highly engaging messages. These messages can thus be considered as the
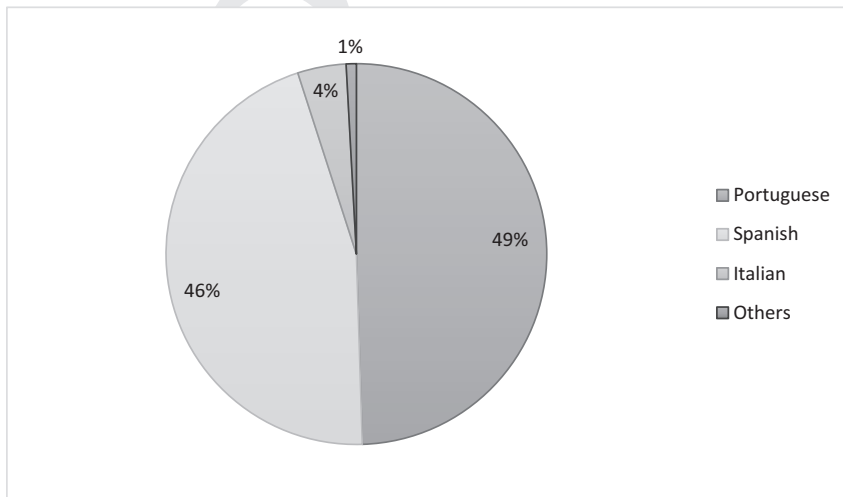
FIGURE 8.1 Distribution of Collected Tweets by Language

TABLE 8.1 Quantitative Description of the Analyzed Sample of Tweets by Language

	A – Single tweets	*B – Original tweets with over 100 replications*	*C – Single tweets generated by replication of original tweets with over 100 replications*	*D – Concentration: percentage of single tweets generated by replication of engaging original tweets (C) over the entire sample of single tweets (A)*
Portuguese	503,472	622	298,988	59.39%
Spanish	462,885	613	188,661	40.76%
Italian	41,874	72	14,243	34.01%
Other languages/ undetermined	8,765	–	–	–
Total	1,016,996	1,307	496,614	48.83%

governing content, setting the tone and orienting discussions on the subject. Two analyses were made on this reduced base of 1,307 original, engaging tweets: (1) the representativeness of the engaging messages in relation to the original sample of unique tweets – which showed a highly concentrated debate between a few senders and on messages of uniform content, but widely replicated by a large base of supporters; (2) the content present in the set of original tweets – which showed the similarities of the discursive elements in the debates in Brazil, Spain, Latin America, and Italy.

• Considering tweets written in Portuguese, only 622 original messages got 100 or more retweets. Through this replication, they developed into 298,988 single tweets, or 59.39% of the whole debate in that language – one entirely associated with Brazil.
• There were 613 engaging tweets in Spanish, which generated 188,661 single tweets, or 40.76% of the debate in the corresponding language. The number of single tweets and engaging original tweets were similar to those in Portuguese, but they generated a less – although still considerably – concentrated debate. This 20% discrepancy may suggest a more horizontal online environment in terms of influence dynamics: fewer users in the Spanish language environment were able to produce large waves of content repetition. This, however, does not rule out the possibility of the existence of symmetric influence dynamics in both linguistic universes. This difference in influence capacity, however, does not rule out the existence of similar dynamics of influence in both linguistic universes. In both languages, the content of the engaging messages suggests dynamics of influence by which few influential exponents condense often indescribable dissatisfaction and unrest into simplified speech, which is then replicated by their followers.

- The Italian language case stood out as significantly less numerous and less concentrated than the two previous linguistic universes: 72 original tweets unfolded into 14,243 single tweets, or 34,01% of the Italian debate.

In general, the debate surrounding the concept of globalism displayed high concentration – as seen in Table 8.1. Few original tweets have been so extensively replicated that their retweets or copies make up for one- to two-thirds of the debate in each linguistic universe. It is worth mentioning, however, that inauthentic behavior cannot be excluded from the mechanism behind these extensive replications.

The literature (Gurajala et al. 2016; Mazza et al. 2022) as well as social platforms themselves define inauthentic behavior as "coordinated harmful activity" (Coordinated Harmful Activity, n.d.) or an activity that emulates the expected authentic behavior of users – by which each Twitter profile corresponds to a person or organization, and whose interactions in the platform correspond to their will, purpose, and belief. False accounts, often called *bots*, often but not necessarily managed by automated control, can act as a legitimate user and post, like, comment, or retweet, artificially boosting a given tweet's popularity and exposure. These profiles, if existent, may have been managed by human or automated control – although in breach of Twitter's terms of service, a simple search on Google for "buy Twitter likes" will display, among millions of results, a vast array of companies offering engagement enhancement.

Such artificial behavior might have increased the concentration in the Portuguese and Spanish language environments. This means that original tweets, while genuine, may have had their engagement metrics artificially enhanced by tweets from false accounts with the intent of augmenting visibility and authentic engagement by genuine users – and therefore inflated the overall debate. The possible presence of inauthentic engagement, although detrimental to the public debate and to the credibility and soundness of the platform's digital environment, does not alter the results of this analysis: the general content surrounding "globalism", naturally or generally spread, shows deliberate intent to reinforce a particular set of meanings and ideological, politicized conceptions. In spite of differences in size, concentration, and prevalence (see Table 8.1), the debate on globalism in the three languages showed striking similarities with respect to the meanings attributed to the concept of globalism, the issues it addressed, and the context to which it referred. The concept of globalism was associated with Portuguese-, Spanish-, and Italian-speaking countries being subject to a nefarious global plot for dominance and undermining of national sovereignty and values.

The discourse was therefore mainly anti-globalist and conspiratorial. It revolved around common themes employed as evidence of the conspiracy: the dominant elites, the political left as an enemy, the coronavirus (Sars-CoV-2), George Soros, the media, the nation. Aside from thematic coincidences, there were discursive/rhetorical resources common to the three universes: when addressing the globalist

conspiracy, the most engaging content was often presented as a "hidden, but undisputed truth", with "undeniable evidence", but which nobody, especially the "powerful mainstream media", wishes to unveil.

An observation of networks in each linguistic universe, considering the authors' identity and origin, that is, examining their role as political actors or social activists, and determining particularities in their foreign policy narratives according to their country, were the next steps forward in this research.[3] Across all three linguistic universes, the relevant authors' "bios" – a self-declared presentation displayed on the profile page – included terms such as Christian, conservative, right-wing, and family. Their anti-global sentiment, translated into terms such as nationalism, patriotism, and sovereignty, was also expressed by flag emojis along with their given usernames – often accompanied by the flag of the United States of America and Israel.

The 622 original tweets in Portuguese, which obtained more than 100 retweets, were issued by 208 authors – 123 of whom appeared only once in the database, and 86 of whom had over two of their original tweets surpassed the engagement threshold during the monitoring period, the maximum value being 41 original engaging tweets per author. Political figures, such as acting congressional representatives, presidential aides, and ministers were among the 33 leading authors, with five or more each issuing original tweets. The others were activists and influencers in the far-right Twitter network.

The Spanish linguistic universe had the predominance of tweets from Spain, with 220 out of the 614 engaging tweets, as shown in Figure 8.2 below. While 20 tweets originated from suspended or unavailable accounts, the remaining universe
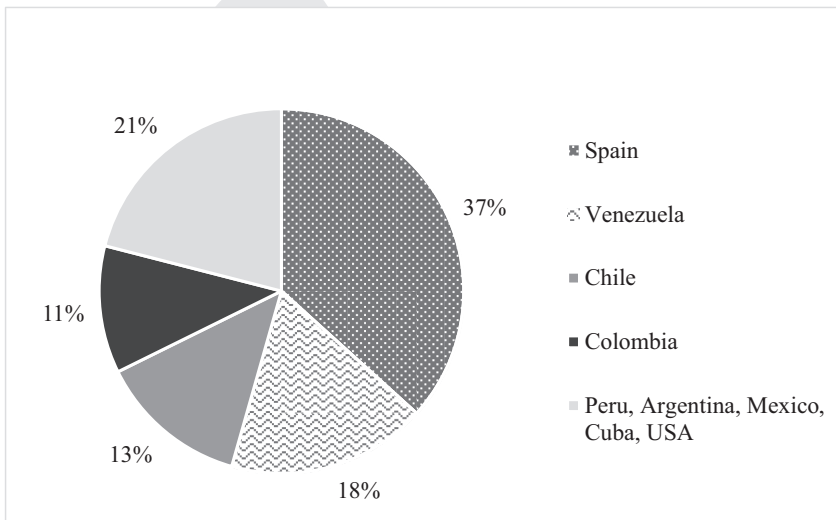

FIGURE 8.2 Original Tweets in Spanish Divided by Country

of 88 traceable individual authors was entirely composed of official Vox party accounts and official party members, or by self-declared Vox supporters. A total of 28 authors had more than one engaging tweet emerge in the database, the maximum value being 17 original engaging tweets per author.

The second most popular origin was Venezuela, with 106 out of 614 engaging tweets. The 44 authors were often self-declared expatriates and "*Chavismo*" opponents. A total of 45 of the 106 engaging tweets originated from only two authors, indicating their influence, and reflecting a high concentration of the globalism-related debate in the country.

Chile also displayed a high debate concentration, with 80 original tweets turning into 21,673 single tweets. However, the concentration pattern appeared different: these 80 engaging original tweets were authored by 36 users, somewhat evenly. Only 7 out of these 36 profiles authored more than two engaging messages – in other words, there were very few major influencers to the debate, producing tweets that crossed the 100-retweet threshold.

Colombia, in turn, had a more highly concentrated distribution pattern: with 68 of the 614 engaging tweets in Spanish, the base included 12 authors, but revolved around a single one, responsible for 47 observations.

Authors from Peru, Argentina, Mexico, Cuba, and the United States (writing in Spanish) also appeared in the monitoring, with less than 20 original tweets per country of emission. The origins of each tweet in the Spanish linguistic universe were not restricted to countries: a relevant author from a given country might reach a foreign audience, as cross-country retweets and mentions have shown.

The Italian case, although seemingly less quantitatively relevant, does not differ much from most of the Spanish-speaking countries, when considering a country-by-country analysis, in terms of a number of relevant tweets: 72 in total. However, the debate was not as concentrated around a few authors: a total of 32 relevant senders were identified, only one of them had more than two tweets with over 100 retweets each, and their account was suspended by Twitter for violating the platform's rules of content propriety.

The traction, or the capacity to attract engagement from Twitter users, of the overall tweets, also varied among linguistic universes. Each original tweet in Portuguese had 959 retweets on average, while tweets in Spanish were retweeted 308 times on average, and 198 times in Italian. These results might indicate a higher propensity for diffusion and popularity among the Brazilian public. Moreover, considering a division by country and not by linguistic universe, Brazil also has capacity to produce online content and engagement regarding the concept of globalism. Single tweets from Brazil correspond to almost half of the entire database analyzed here.

Actors and Themes

The next step of the chapter is discourse analysis, which we have divided into two parts. First, we used the Atlas.ti software to run a computer-assisted content analysis

(CCA) on the 1,294 tweets with over 100 replications. That method allowed us to identify recurring words, which were converted into the first descriptive codes (Saldana 2015). Subsequently, we analyzed each tweet individually, checked the CCA for mistakes, and made sure that the same code would not be associated with a single tweet more than once. Finally, we coded for recurrent rhetorical strategies.

Although valuable, the CCA was not an end in itself: it should come as no surprise that the words and themes mentioned above were associated with glo‑balism. Nevertheless, using Atlas.ti to code the tweets allows us to create reports identifying code co‑occurrence, verify the frequency in each language, and aggre‑gate every tweet under the same code easily. The real purpose of the preliminary CCA is to organize the information for the subsequent discourse analysis. This multi‑method approach can quickly identify primary themes and patterns in vast amounts of text while at the same time allowing the researchers enough flexibility so as not to crystallize the analysis in previously selected pieces of text and themes (Bennett 2015).

Who Are the Globalists?

The first group of codes is presented in Table 8.2. It condenses who the globalists and their allies are. There is a remarkable variety of actors aggregated into this cat‑egory: China, communists, George Soros and Bill Gates, the ~~this should refer to f~~political establishment, international organizations (the European Union, United Nations, World Health Organization), social movements, the mainstream media, and NGOs.

Even though there is some variation in tweets in different languages, as shown in Figure 8.3, the distribution is surprisingly similar: the categories communists and the elites are the top mentions in all three languages. Nevertheless, whereas

TABLE 8.2 Codebook: Globalists

|	
China	Negative references to the People's Republic of China, to its leaders, and/or to the Chinese Communist Party.
Communists	Negative references to communists, socialists, Marxists, "leftists", the left.
Elites	Negative references to George Soros, Bill Gates, Paulo Lemann (Brazilian philanthropist), economic elites, and "globalist elites".
Establishment	Negative references to politics, political parties, the state bureaucracy, and the judiciary.
European Union	Negative references to the European Union, references to Brexit.
The media	Negative references to the media in general or relevant channels or media outlets.
NGOs	Negative references to nongovernmental organizations.
UN/WHO	Negative references to the United Nations and the World Health Organization.
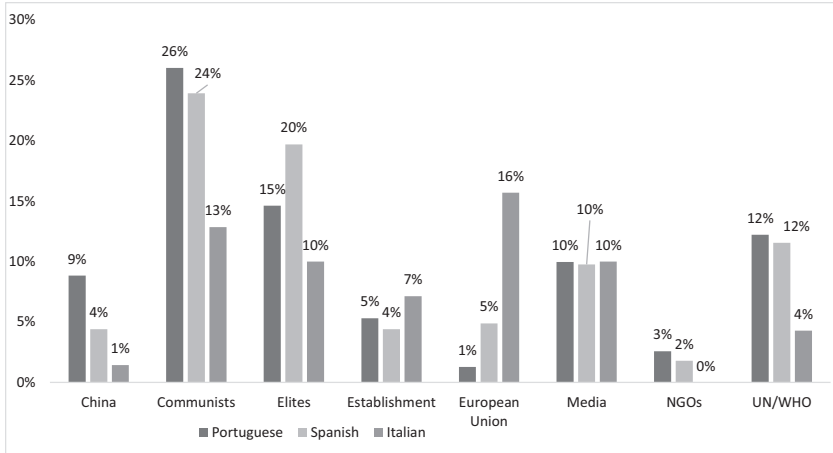
FIGURE 8.3 Globalists

TABLE 8.3 Codebook: Themes

Coronavirus	The coronavirus is a globalist plot, or the globalists are taking advantage of the pandemic.
Education/science	The educational system, especially universities, is controlled by globalists. Rejection of science as being a globalist tool.
Environment	The environmental agenda has been used by the globalists. Climate deniers.
Immigration	Attacks on immigrants and immigration politics.
Identity politics	The anti–racist (including the Black Life Matters movement), gender, feminist and LGBTQIA+ agendas are promoted by globalists. Criticism against those agendas.
Social control	Globalists want to obliterate individual freedom; they want to promote totalitarianism.
Sovereignty	Globalists want to destroy the state. Globalists attack sovereignty, promote global governance to implement their agenda and aim at creating a New World Order in which they rule.
Traditional values	Protection of traditional values, of family, of Christianism. Claims that Pope Francis is a globalist.

criticism against the UN and the WHO are more prevalent in Portuguese and Spanish, attacks on the EU are most frequent in Italian.

Recurrent Themes

In relation to themes, as defined in Table 8.3, coronavirus, the protection of trad-itional values and of the state are prevalent in the three languages, as presented in Figure 8.4. Furthermore, there is a considerable occurrence of the "social
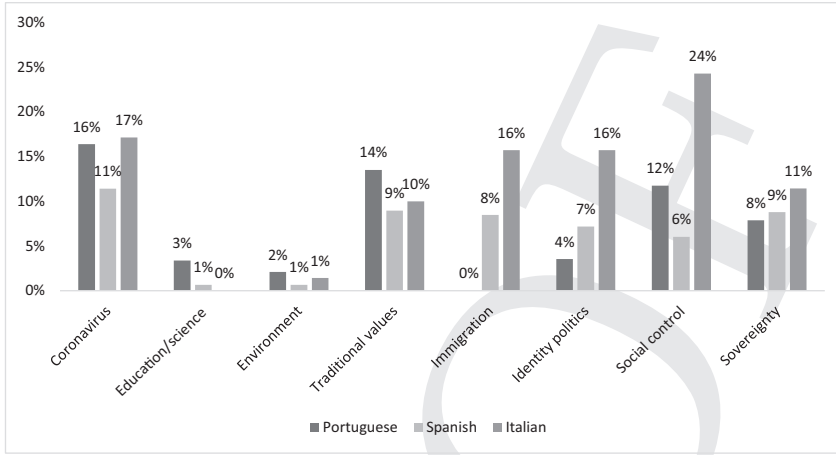
FIGURE 8.4 Themes

TABLE 8.4 Theme versus Globalists Code Co-Occurrence

	China	Communists	Elites	The establishment	European Union	The media	NGOs	UN/ WHO
Coronavirus	27	37	25	3	10	16	2	27
Education/ science	2	5	3	2	0	4	2	7
Environment	1	3	3	0	0	1	1	3
Immigration	2	11	9	5	8	2	6	3
Identity politics	2	17	12	2	5	5	0	2
Social control	8	34	24	10	1	13	1	8
Sovereignty	12	25	16	9	7	5	2	25
Traditional values	3	30	29	5	2	8	1	13

control" code: globalists would seek to destroy the sovereign state and to obliterate individual freedom. The most frequent narrative is that the coronavirus (usually "communavirus") was created by China/communists and has been instrumentalized by globalist elites to promote social control. Table 8.4 also shows us how the pandemic is frequently associated with other actors and themes.

The immigration topic, in its turn, is absent in tweets in Portuguese. For the European countries, however, it is a most sensitive issue, present in 8% of the tweets in Spanish and 16% of those in Italian – in this case, usually associated with criticism of anti-racist movements.

Table 8.4 shows the theme versus Globalists code co-occurrence, that is, the frequency that those themes are associated with the so-called Globalist actors.

Rhetorical Strategies

Some rhetorical strategies are recurrently used to persuade the audience and stimulate the spreading of anti–globalist messages. The first one is the Schmittian friend/foe logic typical of populist discourses (Arditi 2008; Schmitt 2007), usually associated with references to the nation of "the people". This logic is ultimately what defines who the globalists are: those who are against "us, the people", and "the nation". There is a dichotomic construction of the terms "globalist" and "patriot", as opposed, to mirrored images.

The second rhetorical strategy is to use war metaphors to foster a sense of urgency, of existential threat. Anti–globalists need to close ranks for there will be a "battle", they are "under attack", and the globalists are "winning". Furthermore, there is a constant resort to the idea that the globalists are promoting political and social chaos to destroy the state, disaggregate the people, and control every aspect of social life. Globalists are depicted as chaos mongers, sadistically feeding on suffering and disorder. Specifically, any action against Trump or Bolsonaro, such as demonstrations and the Black Lives Matter movement, is disqualified.

Finally, there is reiterated recourse to other conspiracy theories such as ~~Deep State~~ and QAnon. Some well-known strategies present in conspiratorial discourse are identifiable, such as putting together facts and then implying an unproven connection between them by asking "it is obvious, can't you see that?".

These rhetorical strategies work together to create a sense of urgency, promoting immediate replication of tweets, and disqualifying questioning or opposition: those against them would be either globalist agents or victims controlled by the globalist elites. Although these strategies are not new, they have a distinctive geometry: they aggregate state and non-state actors from across the political spectrum in a fast–moving online environment.

The Anti-Globalist Heroes

Trump and Bolsonaro are constantly mentioned as being the most prominent anti–globalist personalities (as shown in Figure 8.5) whom the globalist forces have repeatedly attacked. They are regarded as heroes who protect the nation against globalist forces and should be defended by the "patriots". Although Bolsonaro was frequently mentioned in tweets in Portuguese, there was only one mention of Salvini in tweets in Italian.

Discussion

There are evident discursive similarities across the dataset. In terms of themes, we can identify an equivalence between the far-right group and the nation, presenting those groups as the only true representatives of the popular will. Bolsonaro and Trump are frequently seen as the only forces that can stand up to globalism and
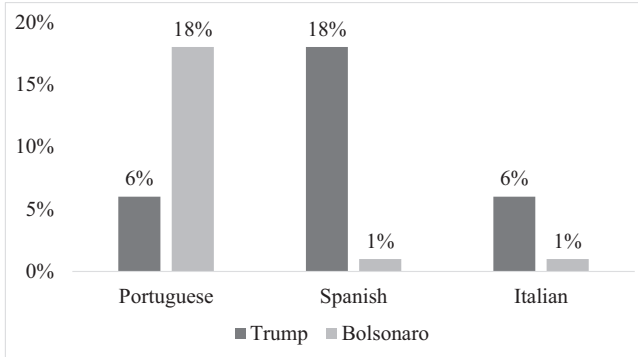
FIGURE 8.5 Anti–Globalist Heroes

preserve the countries' sovereignty against Marxism, international organizations, the media, and global elites. Both Brazil and Spain are seen as targets of the media and globalist movements financed by global leftist elites, of which the billionaires George Soros, Bill Gates, and Jorge Paulo Lehmann are part. Furthermore, since March 2020, COVID–19 was a recurrent theme, perceived as being mobilized by the globalists to promote social control. Another conclusion is that war metaphors are widespread, pointing to the rhetoric of amity and enmity based on a specific understanding of national identity: if you do not share the (far–right) group concerns, either you are an enemy or are being fooled by the globalist enemy.

We also identified some different patterns. On the one hand, tweets about the European Union are more frequent in Spain and Italy, which can be attributed to those countries being part of that institution. On the other hand, the most mentioned institutions referred to in Portuguese were the UN and the WHO. However, there is a significantly higher frequency of tweets mentioning China and the COVID–19 pandemic as a globalist plot in Portuguese, which can be associated with the intense politicization of the health emergency in the Latin American country (Gramacho et al. 2021), whereas Spain and Italy were among the first European countries struck by the pandemic. Additionally, mentions of Venezuela and the Maduro government were more frequent in Spanish.

From the analysis, we can infer that even though social networks are more decentralized than traditional media, there are strong similarities between the messages on them, not only at the national level but also internationally, which points to the different patterns of populist (online) organization, nationally and transnationally (Mazzoleni 2014; Stengel et al. 2019). That is consistent with the idea that the new media has presented original possibilities to populist actors for three reasons. First, the lower costs and amplifying reach of social media have facilitated coordination and the recruitment of new followers. Second, the immediacy of the communication has taken a toll on time for reflection and

fact-checking. Third, anonymity has promoted a safer environment for hate speech and online harassment (Kim 2015). These characteristics are particularly well suited to respond to recent transformations that international society has undergone and help us to understand not only why the meaning of "globalism" has changed, but also why conspiratorial discourse is widespread.

Populism and Conspiratorial Discourse

According to Verbeek and Zaslove (2018), the growth of radical right-wing parties in Europe coincided with major transformations that have impacted the international system, especially the intensification of globalization and the end of the Cold War. In Europe, the acceleration of the globalization process since the 1980s, associated with neoliberalism, has disarticulated welfare policies (Rodrik 2000), intensifying the perception of social isolation and mistrust in governments and the political system (Brown 2019; Solano 2018). In Brazil, however, Pinheiro-Machado e Scalco (2020) argue that the economic boom of the Lula years (2003–2010) and the consequent inclusion of millions of members of the least-favored classes into the market economy were followed by self-empowerment and a sense of self-worth. When Brazil sank into economic recession in the 2010s, the diminished capacity to consume goods and services and the disarticulation of collective communitarian support networks resulted in a crisis of self-worth and a mistrust of political institutions. Bolsonaro, who claimed to be a political outsider and promised to restore economic growth and social order, emerged as a "national savior" and won the 2018 presidential race.

Globalization has complicated questions related to identity, no longer suppressed by the East/West dispute. Identity now dwells in the heart of political debate, for nationalism has now to compete with many other forms of identification, such as gender and race. To summarize, "globalization has produced a politically powerful sentiment: a feeling that the global economy produces new victims and villains, renders governments less powerful, and requires a new anchor in terms of identity" (Verbeek and Zaslove 2018, 496). The end of the Cold War resulted in the restructuring of Western political systems, for unpopular or contested policies could no longer be excused in the name of facing the Communist threat. Consequently, political differentiation could be found not outside of the capitalist democratic game, as when the communist threat existed, but within it. The dominance of many traditional parties has been destabilized and challenged across the globe.

The reemergence of populism in the post-Cold War era (Kaltwasser et al. 2018) can be associated with this process of finding another nemesis, replicating the Manichean logic that permeates the concept of "pure people" against "corrupt elites". However, that is no easy task when identities are constantly shifting, and political groups dispute the people's loyalty. According to Moffitt, the media could play an important role in reinforcing the opposition between people and elites.

This appeal to "the people" versus "the elite" and associated Others plays into the traditional media logic of dramatization, polarization, and the prioritization of conflict. Right-wing populism's "bad manners" line up with the traditional media's logic of personalization, stereotypization, and emotionalization, while its focus on crisis plays into the traditional media's tendency toward intensification and simplification (Moffitt 2016).

Technological innovation, web 2.0, and the new media promoted a "virtual immediacy" that was put to use by populist movements (Arditi 2008; Moffitt 2016; 2019). In this virtual environment, characterized by fast replication, no fact-checking and little time for reflection, grandiloquent and simplistic narratives typical of populism (Waisbord 2019) thrive.

When it comes to globalism, although there is a plethora of themes associated with the term, there is striking homogeneity in the meaning of it found on Twitter. The term globalism was first employed by far-right patriot movements in the United States during the 1990s (Kazin 1998). Examining globalism at the beginning of the 21st century, Steger (2008) identifies different definitions of the term, ranging from left to right, but all linked by an aversion to the globalization process. However, the dominating meaning in the analyzed tweets take globalism not to be a discourse opposed to economic globalization, but a conspiracy uniting China, international organizations, Marxists, the political establishment, the media, feminists, LGBTQIA+ and anti-racists. That category, however, is fluid enough to include any group that opposes Bolsonaro or Vox policies, such as other political parties. The term "globalism" was resignified, shorn of the criticism of economic globalization and gaining a conspiratorial tone.

The rise of an extremist right-wing populist wave worldwide has become a central issue in political debate as a global "anti-liberal phenomenon", which must be appreciated along with the transformations brought by globalization, technological development, and identity diversification typical of the 21st century. "Globalism" as a discourse is especially valuable for those populist movements. It is capable of responding to competing and overlapping identities, merging and stabilizing all opposition to the mythic "people" under the same label. By doing so, it constructs a dichotomized relation between "us" and "them" which operates on a global scale. Far-right groups promote the discourse of "globalism" to amalgamate any opposition into an easily identifiable global enemy, replicating a bipolar logic. However, for that strategy to succeed, it is imperative to find a link between the diverse groups that constitute the "elites". The idea of conspiracy serves that purpose, but it could hardly resist careful reflection and thorough investigation.

This role as a cognitive shortcut gives the anti-globalist online debate its long-lasting importance. As often happens with extemporaneous waves of conversation and dispute over specific terms on social platforms, the terms and co-occurring themes surrounding the globalist conspiracy may disappear from the public debate, both on- and offline. Still, they will have served as an emblematic case to illustrate

the means, tactics, and discursive resources employed by ultraconservatives amid a global surge of far-right populism and a crisis of globalization. It indicates how relevant the digital media environment has become to 21st-century politics and foreign policy: the immediacy encouraged by these platforms, their pervasiveness and their promise of user empowerment play a central role in bringing emotions to the center of political attitudes and electoral preferences.

Notes

1 The plural of globalist as it is written only finds correspondence with Portuguese and Spanish terms, not applicable Italian.
2 At the time of the monitoring period, the metric which today refers to "quotes", meaning retweets with a commentary, were not yet differentiated from retweets without comment. During the monitoring period, Twitter's forms of engagement were "likes", "replies", and "retweets". Retweets could be expressed in two forms: a simple replication of the original tweet or a replication with commentary – which later became known as "quotes". Then, however, the obtainable metadata would not differentiate tweets from quotes, and therefore retweets and quotes were all gathered under the metric "retweets".
3 Numerous tweets had been removed from the platform for content impropriety in the interval between the collection and this analysis. Whenever an account is suspended, there is still a possibility of identifying the profile with a simple browser search. However, when a single tweet is erased or removed, the identity of its author is hardly traceable. Out of the 1,294 most engaging tweets in this database, 161 had been deleted from Twitter or were made unavailable as their authors' accounts had been suspended. Their textual content was still available for analysis and has been included here – and was either offensive or promoted disinformation.

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9

SCORCHED-EARTH POLITICS AND THE ERASURE OF MEMORY BY FAR-RIGHT POPULISTS

Amon Barros, Ana Diniz and Gabriela Lotta

"September 2018: Presidential candidate Jair Bolsonaro affirms that Brazilian environmental policies are an obstacle to economic development. January 2019: the Ministry of the Environment loses prerogatives and budget in the first administrative reform of Bolsonaro's government. February 2019: The federal government sacks 21 of the 27 regional environmental inspectors. March 2019: The Ministry of the Environment issues a regulation gagging civil servants responsible for controlling and monitoring the use of natural resources. August 2019: Deforestation in the Amazon Forest increases 278% in July 2019 comparing to the same period in 2018. Bolsonaro questions the accuracy of data on deforestation produced by public agencies."

ASCEMA 2020, 3–13

Introduction

The Brazilian government headed by Jair Bolsonaro is engaged in deconstructing environmental policies while also attacking civil servants' autonomy. The same tactic is repeated throughout his government to dismantle organizational structures, public policies, and the credibility of bureaucrats. Like other far-right authoritarian populists who took power in the last decade, President Bolsonaro is aware that the state bureaucracy can hinder his plans to reset the Brazilian state. As he said at a dinner at the Brazilian embassy in Washington on March 17, 2019: "Brazil is not an open ground where we intend to build things for our people. We must deconstruct a lot" (our translation). Although anecdotal, the quote reveals the permanent conflict between politics and bureaucracy, especially in the emergence of populist regimes (Barros and Wanderley 2020).

The relationship between politics and bureaucracy has been extensively discussed in political sciences and public administration (Weber 1994; Peters 1978; Putnam, Aberbach, and Rockman 1981; du Gay 2020). In these discussions, the bureaucrats are usually portrayed as those who can guarantee public expertise, the law, the continuity of the state, institutional memory (du Gay 2020), and democratic institutions. However, the tensions surrounding the role of bureaucratic memory remain undertheorized.

This chapter investigates the role of memory in various perspectives on bureaucracy. We use metaphors (Boxenbaum and Rouleau 2011; Inns 2002) to link different meanings related to bureaucratic memory to contrast the Weberian tradition, the New Public Management (hereafter NPM) school, and Critical Management Studies (CMS). We identify conflicting roles of bureaucratic memory as "foundation," "paradox," and "instrument of domination." This analysis paves the way for identifying a new perspective on bureaucracy, with memories targeted as enemies to be destroyed in the name of a new political project. Leaders who use scorched-earth politics want to force bureaucracies to "drink from the waters of the Lethe" (Ciuk and Kostera 2010) and to impose their wills regardless of efficiency, concerned only with political loyalty. In this sense, memories are a means to resist authoritarian pressures while concomitantly being a nuisance that authoritarians want to erase. Bureaucrats' resistance is embedded in their everyday routines (Courpasson 2017), sometimes in an ongoing dispute to influence the route the organization is taking (Courpasson, Clegg, and Clegg 2012; Pollitt 2009).

From the ongoing debates about the uses of the past (Lubinski 2018; Maclean et al. 2018; Wadhwani et al. 2018), and the role of memory in organizations (Anteby and Molnár 2012; Foroughi et al. 2020; Rowlinson, Casey, Hansen, and Mills 2014), we discuss how bureaucratic memory contributes to protecting democracy. While embodying memories of processes, civil servants challenge populist leaders who want to maintain revolutionary fervor and shape the state while maintaining a permanent campaign (Gerbaudo 2019). In this sense, we emphasize the positive role of memory and the bureaucrats as safeguards of democratic institutions, claiming that resistance is also a work of memory.

Mnemonic Studies or the Place of the Past in Organizations

Since the "historic turn" (Clark and Rowlinson 2004), there is a steady growth of research aiming at understanding how the past is revisited in organizations (Kroeze and Keulen 2013; Suddaby, Foster, and Quinn Trank 2010) and how histories are developed. Studies have also acknowledged the importance of memory for public bureaucratic organizations (Pollitt 2008; 2009).

More recently, attempts at framing and naming a specific subfield have emerged. They have been called "organizational memory studies" (Rowlinson, Booth, Clark, Delahaye, and Procter 2010), "historical organization studies" (Maclean, Harvey, and Clegg 2016), and "mnemonic studies" (Coraiola and Murcia 2020).

In addition, further attempts to organize the debate around subgroups have been developed, aiming at highlighting the research identities within these dialogues (Coraiola and Murcia 2020; Decker 2016; Decker, Hassard, and Rowlinson 2020; Durepos, Shaffner, and Taylor 2019).

Social memories shape behaviors (Rowlinson et al. 2010). Organizations in general and public organizations more specifically develop shared memories that impact their structures and dynamics (Wadhwani et al. 2018). Context plays an important role in how memories are summoned and acted upon (Lubinski 2018). As Pollitt (2008; 2009) stresses, the past influences the present through everyday practices within public organizations.

Organizational memory and organizational learning have long been intertwined (Walsh and Ungson 1991). More recently, authors have suggested the concept of "organizational mnemonics" as a better frame to understand how the past leaves its traces in organizations (Coraiola and Murcia 2020), keeping in mind that power dynamics shape memories and memorialize things (Casey and Olivera 2011; Pollak 1989). This includes which answers to problems become rules in bureaucracies (Walsh and Ungson 1991).

Established bureaucracies are, nevertheless, sites of ingrained memories, and consequently, organizational learning. Less-structured, post-bureaucratic organizations have more challenges with keeping memories (Pollitt 2009). Critics tend to see bureaucracies' negative aspects (Lopdrup–Hjorth and du Gay, 2020), forgetting the role of those systems in maintaining and retaining knowledge (Argote 2011; Casey and Olivera 2011), in ensuring democracy (du Gay and Morgan 2013; Weber 1994) and using the past to influence reforms in the present (Arnaboldi, Lapsley, and Molin 2016).

Bureaucracy, Management, and Organization Studies

Max Weber examined the concept of bureaucracy as a domination system based on legal and instrumental rationality, in which the means are organized for the ends (Weber 1978). This system of domination, which gained predominance in the modern world, permeates social relations, systems of authority, and public and private organizations. Moreover, it has an advantage over all other systems of domination because of its specialization, certainty, continuity, and unity (Rockman 2019).

The rise of bureaucracy is also an essential condition for the existence of democracies (du Gay 2020), as a democratic regime presupposes the existence and maintenance of laws, impersonality in their application, and separation between the ruler and the ruled (Weber 1978).

Although Weber treated bureaucracy as a system of domination, organization theorists used these conceptual bases to analyze bureaucratic organizations over the decades. Consequently, bureaucracy became a crucial concept in organization studies (Lopdrup–Hjorth and Roelsgaard Obling 2019). Furthermore, organization studies focus on formal bureaucratic organizations (Scott 2004), with Weber's

idea being Americanized to fit the mainstream (Shenhav 2005). Over time, however, the concept became more associated with negative characteristics assumed by large organizations (du Gay 2000), especially under the idea of dysfunctional organizations (Merton 1963).

After the mid-1990s, the rhetoric of post-bureaucratic organizations flourished (Hodgson 2004), in line with the ideals of the NPM and reengineering (du Gay 2000). The idea that bureaucracies would be more or less the unchanging organizational form was increasingly challenged (Clegg 2012). The figure of a passionless bureaucrat, once popular, became an object of distrust for many – even if bureaucrats also have feelings (Lindebaum and Courpasson 2019). The rhetoric against bureaucracies advanced in a "revolutionary" and unsparing way, causing many organizations to lose resilience and "knowledge they did not know they had" (Clegg 2012), leading to organizational amnesia (Pollitt 2009). These developments tell us about the shifting legitimacy status of bureaucratic organizations and public institutions (Kallinikos 2004).

Nevertheless, assessments anticipating bureaucracies' demise were inaccurate (Courpasson and Clegg 2006; Courpasson and Reed 2004). Cultural and technological changes were not enough to make command and control completely obsolete (Courpasson and Reed 2004), even if we saw the emergence of more hybrid organizations (Clegg 2012; Hodgson 2004).

Organizations dealing with complex themes and populated by professionals, for instance, tend to adapt control mechanisms under environmental pressures without letting go of bureaucracy (Bleiklie, Enders, and Lepori 2015). At the same time, changes in the managerial profession also meant that increasingly they are seen or pushed to act as consultants, even within the organizational boundaries (Sturdy, Wright, and Wylie 2016). The rise of the NPM meant that the same holds in public organizations, which often outsource their managerial cadres.

The changes in expectations around how public bureaucrats should perform their work were organized mainly to inculcate the idea of responsiveness and ownership (du Gay 2008). In Weber's original ideas, the division between bureaucrats and politicians was essential for guaranteeing rational domination and democracy (du Gay 2020). Politicians should represent the people acting according to their vocation, sense of responsibility, and proportion. Bureaucrats, on the other hand, should not do politics. They should manage and carry out their mission without resentment and prejudice (Weber 1994). Thus, while politicians would guarantee the representation of the people's will, bureaucrats would ensure the maintenance of laws, impersonality, and the continuity of the state (Weber 1974), protecting the state's legality and standardization (du Gay 2020), which are characteristics of rational–legal authority (Rockman 2019).

Over the years, several studies have shown that this division is not always clear or possible (Aberbach et al. 1981). However, the mutual interference between bureaucracy and politics can have several consequences for the bureaucratic system and democracy (du Gay 2000). When a government with little care for constitutional

boundaries assumes office, they have much more sway to adapt the state to personal or partisan rule and prefer loyalty to competence (Sasso and Morelli 2020; du Gay 2020). Undermining bureaucratic independence is a goal for autocrats wishing to weaken the autonomy and independence of institutions (Rockman 2019), even if they do not plan what happens after (Peters and Pierre 2019).

Bureaucrats need to uphold a particular ethos in their work which does not need to be consistent with other dimensions of their lives (du Gay 2000). Opposing some of the criticism against bureaucracy, coming from both the left and right, some authors focus on the positive characteristics of bureaucrats, especially in maintaining the constitutional order (Byrkjeflot and du Gay 2012; du Gay 2000; 2008; Lopdrup-Hjorth and du Gay 2020): "representative government requires officials to act as the custodians of the constitutional values it embodies, it cannot frame the role of bureaucrats solely in terms of efficient management, performance, responsiveness and securing results" (du Gay 2000, 20).

In this perspective, memory plays an important role – even if undertheorized – as a central element for institutional construction and continuity (Pollitt 2009). Bureaucracies are not temporary organizations, and their characteristics, such as the rules, defined hierarchy, and procedures, are "the bedrock of continuity and consistency in bureaucratic decision-making" (Pollitt 2009, 199). Bureaucrats are responsible for generating and preserving the institutional memory that should be registered, official and impersonal, and are usually associated with official files. The permanence of memory and organizational continuity depends on the stability and relative neutrality of these bureaucrats.

The Role of Memory in Post-Bureaucratic Approaches

Memory has always had a political character (Dosse 1998; Pollak 1989). It also reinforces affiliation to a shared past recognized as correct and factual, often under the seal of official history (Dosse 2014). Memories are part of every shared experience woven into collective everyday lives through narratives that bring people into "mnemonic socialization" (Zerubavel 1996). Memories live on, even if those who lived the experiences are not there anymore (Dosse 2014). Consequently, bureaucracies are sites of memory (Anteby and Molnár 2012), regulated by shared rules of remembrance (Zerubavel 1996), which are also embedded in the architecture and objects (Barros et al. 2019; de Vaujany et al. 2020). However, analyzing post-bureaucratic approaches, Pollitt (2009) proposes that they question the importance of memory in public organizations and propose new forms that generated a loss of memory.

We suggest that each of the discussed perspectives on managing public organizations has an implicit memory approach and that the same goes for its questioning from critical scholars. Of course, this treatment is connected to a view of the past and what it represents. Still, it can also be established in line with

dominant narratives about the present, like "there is no alternative," the irresponsive bureaucrat, the "deep state," or the lazy civil servant that needs to have his job reformed.

New Public Management and Memory as a Conflicting Resource

The NPM approach was developed in the late-1970s (Clarke and Clegg 1999) and gained expression across the world, especially in the 1990s (Ferlie 2017; Hood 1991). Since then, it became a global model widely adopted by governments (Haque 2007) and a relevant research topic in public administration (Hood and Peters 2004) and organization studies (e.g., Bleiklie et al. 2015) in particular. Even though it has lost some of its force in the last decade (Dunleavy et al. 2006), it is still influential in public administration. Moreover, it is embedded in many of the alternative administrative models of reform developed after that (Ferlie 2017).

NPM can be understood as a reaction against the traditional rule-bound Weberian form of public organization (Ferlie 2017). It builds on criticism of the dysfunctions of bureaucracy (Byrkjeflot and du Gay 2012) to promote the reorganization of the public sector following business methods (Dunleavy and Hood 1994; Ferlie, Ashburner, Fitzgerald, and Pettigre 1996). Grounded on a neoliberal ideology, NPM reasserts market-centric assumptions about the superior efficiency of competitive market forces and the necessity of a smaller government (Dibben, Wood, and Roper 2004). Therefore, it seeks to scale down large public bureaucracies, reduce the power of strong trade unions and public services professionals, and create "business-like" public services (Ferlie 2017).

One of the NPM's strengths relies on its appeal of universality. NPM was presented as a supposedly apolitical framework (Hood 1991) to address multiple "bureaupathologies" (Dent, Chandler, and Barry 2004, 39) in different contexts. In his influential study, Hood (1991, 4–5) stresses seven doctrinal components of this approach: (1) "hands-on professional management" with high managerial autonomy to achieve results; (2) "explicit standards and measures of performance"; (3) "emphasis on output controls," with the allocation of resources and reward systems linked to results rather than procedures and routines; (4) "disaggregation of units in the public sector"; (5) "greater competition in the public sector"; (6) "stress on private-sector styles of management"; and (7) "greater discipline and parsimony in resource use." These elements would supposedly improve accountability in resource use and ensure efficiency in service delivery, "doing more with less."

However, Hood (1991) warns that the doctrinal components are not equally present in all cases. They can also be translated into different sets of practices. Batley and Larbi (2004) organize them into three main categories. First, organizational restructuring comprises practices of downsizing and the disaggregation of bureaucracies into more autonomous agencies. Second, NPM uses market-type mechanisms, such as privatization, contracting out, and marketization of services

in the public sector. Ferlie (2001) stresses that this dimension goes beyond the privatization of national industries highlighted by research in the field, including creating "quasi-markets" in core services remaining inside the public sector. Finally, the authors discuss the focus on performance, in which systems that measure performance evaluation are adopted (Batley and Larbi 2004; Ferlie 2017).

Similar to organizational learning (Coraiola and Murcia 2020; Foroughi et al. 2020), NPM reflects a database approach in which bureaucratic memory is a paradoxical resource that should be strategically managed. On the one hand, memory should be reviewed or even erased to ensure efficiency in public administration (Dunleavy and Hood 1994; Pollitt 2009). As Dibben et al. (2004) argued, NPM shares with Public Choice Theory a negative view of bureaucrats, seeing them as self-interested agents who will use their regulatory and distributive power to their own benefit. In this low-trust environment, the monopoly over the provision of public services should be replaced by competition, along with the adoption of externally produced measurement systems (Ferlie 2017). This process of change would also demand a profound revision of current procedures, opening space for innovation and increasing managers' discretionary power (Dunleavy and Hood 1994).

On the other hand, questioning strict rules should not lead to the complete absence of norms (Dunleavy and Hood 1994). Pollitt (2009) points out that postbureaucratic forms of organization, such as those derived from NPM, perform less well concerning organizational memory. Important institutions in the dissemination of reform approaches, such as the Organization for Economic Co-operation and Development (OECD 2005, 12), have identified the "loss of continuity, of institutional memory and long-term capacity" as one of the risks of structural change promoted in public organizations. In this view, institutional memory is also connected to specific organizational cultures that provide values, knowledge, and capacity to effectively deliver public policies. To deal with this negative side of NPM and ensure positive outcomes, knowledge management should follow restructuring, including to ensure a productive process of change. In this context, out-of-date bureaucratic memory should be replaced by minimum institutional procedures to manage change toward a lean state (Ferlie et al. 1996).

Critical Management Studies and Bureaucracy as Domination

Bureaucracy has been under attack from critics for a long time (Byrkjeflot and du Gay 2012). Criticisms range from Arendtian criticism against the "banality of the evil" carried out by clerks working for oppressive regimes (Arendt 2006) to more straightforward critics against the dehumanization supported by the bureaucratic machine (Bauman 1989). On the other hand, critical management scholars see it mainly as a surreptitious control mechanism (Lopdrup-Hjorth and du Gay 2020). Although this criticism is not necessarily focused on state bureaucracies, it can easily be deployed by right-wing populists (Lopdrup-Hjorth and du Gay 2020). Here, bureaucracy is the memory of hierarchical power relations, rigidifying

the decision–making process, limiting freedom, and oppressing everyday life in organizations.

A difference in their angles of analysis explains part of the difference between critics of bureaucracies (e.g., Valérie Fournier and Grey 1999; O'Doherty 2018) and people coming forth in defense of formal organizations (Bauer and Becker 2020; du Gay 2000; du Gay and Vikkelsø 2018). Also, academics thinking mainly about the state instead of private corporations may seem more inclined to see value in assertive bureaucrats. They see civil servants as potential upholders of constitutional values (Pierre 2019) and highlight the risks of voluntarism for the polity and policymaking (Bauer and Becker 2020).

Nevertheless, critical academics tend to side with the opponents of bureaucracy. First, those focused on corporations will highlight the cleavages between owners and workers and between managers and workers. Second, businesses are broadly and correctly understood as undemocratic organizations that hold a lot of power in societies. Private bureaucracies are then systems of control, domination, and compensation that offer a map and a narrow pathway to power to people who submit to their commands in exchange for their salaries.

Critical academics also focus on the already existing patronage, favoritism, and clientelism that favor the elites as a justification to show that real–life bureaucracies do not uphold high ideals (Valérie Fournier and Grey 1999). Also, they highlight bureaucratic insulation and its role in keeping things as they are to emphasize its role in reproducing oppression. Second, those who think about organizations, in general, tend to leave aside how different command and control structures have different claims to legitimacy in society. Third, since the state itself is primarily seen as a central actor in maintaining social hierarchies, its apparatus is duly criticized as nothing more than a passive agent serving elites. State power is seen as a form of domination curbing freedom and hindering alternative ways of being in society. Finally, the state is understood as a tool for the ruling classes to manage social conflicts with the dispossessed.

In sum, the criticism directed toward bureaucracy and the state has firm grounds. It is also connected to the development of the subfield (Rowlinson and Hassard 2011), enriched by different traditions that are critical of power, hierarchies, and the capitalist order (Valérie Fournier and Grey 2000). Thus, when critics write, they have some improved version of reality in mind which is fairer, more just, and with more spaces of autonomy for the development of noncapitalistic subjectivity (Alvesson and Willmott 1992). Nevertheless, the criticism of state bureaucracies may fail to consider the hazards of giving more leeway to governments (Lopdrup-Hjorth and du Gay 2020).

Far-Right Populism and Memory as an Enemy

Nevertheless, bureaucracy has been under renewed attack. If in the early 2000s, the primary source of criticism was the NPM canon (du Gay 2000), now various

populist governments are targeting bureaucrats (Bauer and Becker 2020; Renteria and Arellano-Gault 2021; Rockman 2019). Their main goal is to have a responsive government replacing a responsible one (Byrkjeflot and du Gay 2012). Moreover, since populists are delegates of the general will and embody the people, they would have the legitimacy to demand that the government should obey these imperatives (Kaltwasser 2014).

We identify the emergence of an anti-bureaucracy perspective, according to which previous governments' vestiges must be erased to build a fresh and new state. It would pass through the dismantling of institutions, policies, organizational structures, and, ultimately, the bureaucrat's knowledge and memories. Therefore, the attack on bureaucracy in general and bureaucrats more specifically integrates a broader process of obliterating the past to more easily establish an authoritarian project that ignores republican and democratic processes (du Gay 2020).

In bureaucratic public organizations, the past leaves various traces in structures, dynamics, and personal memories. Some of them are embedded in routines (Cohen and Bacdayan 1994), others are in organizational culture, tools, structures, norms, and networks (Argote 2011; Walsh and Ungson 1991). In democratic societies and organizations with a robust public ethos, these traces favor the commitment to norms that preserve the institution from governmental voluntarism. This sort of resistance to change is targeted by governments who want to inject more power into the executive to reform organizations. Beyond arguing for replacing memory that reforms may cause (Byrkjeflot and du Gay 2012; Pollitt 2008; Stark and Head 2019), we add that the erasure of these memories aims to establish a new way of governing, the scorched-earth government. The scorched-earth government wants to force bureaucracies to "drink from the waters of the Lethe" (Ciuk and Kostera 2010), to impose their wills without the cover of efficiency, arguing only about political alignment.

The scorched-earth behavior brings to conscience pre-reflexive assumptions for granted (Coraiola and Murcia 2020; Gherardi 2000), dealing with how a democratic institution should work. We are not necessarily discussing forgetting (De Holan and Phillips 2004), but attempts to manipulate memories to repress certain elements (Ricouer 2004), "institutional amnesia" (Stark and Head 2019) that is willfully produced. Some authors notice that NPM might be directly connected to erasing memories, making recording more difficult and creating amnesia (Wettenhall 2011). Scorched-earth administrations aim at preventing established knowledge about how things should be done from entering the conversation and impacting the organizational dynamics. The scorched-earth governments' leaders try to force the community to forget the prior process and organizational identity. These processes can lead to costs that include

> not only a loss of public expertise and authority (a diminution of office-based competence) but vastly increased scope for patronage and private influence, as well as enhanced opportunities for and temptations to corruption – the

blurring of office and self, and the re-emergence in the suitably modern guise of office as a tradable good.

du Gay 2009, 94

This process of attacking bureaucracy and erasing memory is not linear nor straight-forward. Populists face many forms of resistance, as evidenced by O'Leary (2017; 2019) as guerrilla government, or subversive action, as proposed by Olsson (2016), or even new forms of resistance (Peters and Pierre 2019; Ingber 2018). However, even when encountering these new forms of resistance, populists may find new ways to get around or face them. The increase in persecution of civil servants in some countries, such as Hungary and Brazil, are example of counterreaction. These cases show how the construction and preservation of memory is an object of dispute within organizations and politics.

Approaches toward Memory in the Debate about Bureaucracy

So far, we have presented the discussions around Weberian bureaucracy and showed how it is understood as a foundation for modern organizations. Thus, the concept became one of the foundations for organizational studies. Next, we presented three perspectives for bureaucracy that are established in dialogue with the traditional Weberian-inspired model. Finally, we highlight how interpretations around bureaucracy, bureaucrats, and procedures profoundly impact how memory is perceived or experienced. This session will extend this examination by empha-sizing how Weberian-inspired bureaucracy, NPM, CMS, and populist governments orient themselves around two critical issues: belief in bureaucracy and political tendency. Those two issues will guide our analysis, as shown in Figure 9.1.
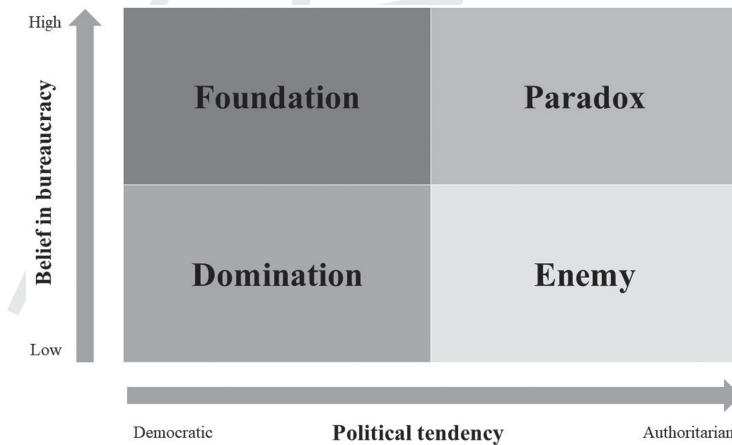
FIGURE 9.1 Orientation Regarding Belief in Bureaucracy and Political Tendencies

When bureaucrats have high legitimacy and a democratic political orientation, civil servants assume a key role in preserving managerial systems of command and control, seen as fundamental to a democratic government. Memories, kept by individuals or formal regulations, are a **foundation** upon which governments can build their actions. Since this perspective sees politics and techniques as separate dimensions, bureaucrats are seen as guardians of the protocol. The state is seen as an apparatus beyond any single government and embodies minority rights within majority rule. Acted-upon memories are almost a natural by-product of bureaucrats' everyday lives at work, the way processes are organized, and results kept. Over time, memory builds cohesion between political decision-making and democracy.

NPM believes in technocracy, and in this sense, it is similar to Weberian-inspired bureaucracy. However, there is one substantive difference: the focus on the technocrat appointed on a case-by-case basis, with market experience, who will focus on results and not the task and how it is performed. Here, the civil servant carries a dysfunctional logic, detached from the public and the government, operating only to expand the bureaucracy itself. NPM sees the Weberian-inspired bureaucrat as the reproducer of outdated processes. These processes are replaced by an entrepreneur who will deploy the latest managerial techniques to assure effectiveness and responsiveness in public policies.

Here, memories are a paradox. Civil servants initially used them as a fortress against change. NPM wants to turn this upside down, erase useless reminiscences, and use other processes as a background system to support procedures that will develop new memories, moving public services toward market practices. NPM sees itself as neutral, but its emphasis on markets and understanding of the citizen as a consumer of services give space to an authoritarian and technocratic neo-liberal logic. NPM answers its critics by highlighting social control exerted by individuals, and consumer-citizens, who will monitor services that will also face competition whenever possible. Social control is exerted by isolated individuals and market forces through regulatory agencies. Monitoring does not come from tradition or procedures as in Weberian-inspired bureaucracy. It comes from the outside.

CMS also distrusts the bureaucrat, but for different reasons. Civil servants are seen as agents of the Weberian iron cage, insulated from society. Knowingly or unknowingly, their work reproduces social inequalities since their environment is shaped mainly by the elites. Memories, especially those institutionalized in regulations, maintain domination. By seeking neutrality and aiming to uphold the established order, they may ignore the political subtext of the rules they abide by. However, CMS criticizes the civil servant's neutrality from a position different from NPM. The bureaucrat is not responsive to society and moral values that are not ingrained or effectively denied by their rules. Therefore, what CMS seeks is not responsiveness to individual clients' needs but a substantive action that upholds human rights, participation, and other elevated values. Institutional memories

framing bureaucratic actions are recognized as limits to the transformation of bureaucracies into socially accountable organizations. The remedy, at least partially, is to enforce minority rights, open the state to organized civil society, and fight oppression and inequality. Where NPM controls outcomes, CMS worries about processes and the values subjacent to them.

Finally, for authoritarian populists, the bureaucrat is an agent of resistance against the will of the leader, who embodies the will of the real people. The memories kept by the bureaucracy are enemies of the people. Procedures are obstacles to the fulfillment of the desires of the majority. Civil servants, upholding their offices with any degree of independence, protocols, and control systems, will be replaced by appointees of the leader who will act following the political goals established by the representative of the majority's will. Here, memories need to be erased because they can reason against the dictates of the authoritarian government. New people will ensure that institutions and organizations are razed to allow for something else to grow. Nevertheless, it does not seem there is much clarity around what will come next besides a system that enforces fidelity.

The four metaphors we presented are meant as a heuristic analytical tool. They help make sense of memory in public bureaucracies and how they relate to different governing approaches. However, it is still necessary to compare these four perspectives with what is happening in a given situation to classify and make sense of governmental actions. Additionally, we highlight the murky field of contested meanings involved in examining governments. For instance, authoritarianism is usually associated with an autocratic state. However, market mechanisms or technocracy can foster or uphold authoritarianism, even if they are not governing. At the same time, democracy can be construed as the will of the majority or a system where the majority rules respecting minority rights. These multiple meanings will shape how a government will fit into the matrix discussed.

Conclusion

Much of the debate around public management and civil service reforms does not directly discuss the role of memory but considers it a source of resistance to change. We present four metaphors to understand how memory plays a part in different theories about bureaucracy. Memory is a foundation for Weberian-inspired bureaucracies, a paradox for the NPM, an instrument of domination for the CMS, and an enemy to be defeated by the authoritarian populist.

Beyond presenting our heuristic tool, our work emphasizes how bureaucracy and civil servants are important actors in shaping governments, even if they appear only in the background. Therefore, most governments will establish an approach to manage bureaucracy but can often forget about memories. Nevertheless, they will deal with memories, either as a resource or as a nuisance. Specifically, authoritarian populists actively try to erase remembrances in scorched-earth politics to establish a clean slate occupied by loyalists.

The bureaucracy in public organizations and governments may hinder attempts to take complete control of the state. Although ambiguous, since civil servants are nonelected officials, in states governed by democratic principles, resistance might uphold norms and the rule of law. We emphasize that memories are critical in shaping resistance to any takeover of the state machine. Although we are aware of the potential downsides of enforcing bureaucracies, coming from insulation, lack of accountability, and responsiveness, topics that the various critics try to tackle, we would like to reassert the importance of civil servants. Moreover, we showed that memory is critical to understanding bureaucracy in practice.

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10

NARENDRA MODI AND THE POLICE IN INDIA

National Populism, Politics of Fear, Victimization, and Cultural Policing

Christophe Jaffrelot

Police forces often play a key role in the rise to power of national populists[1] and the consolidation of their authority. Two processes are at work in these initial phases of their trajectories: the police help them to polarize society along ethnic or ethnoreligious lines by resorting to a politics of fear (see Haleh Afshar 2013, Altheide 2003; 2006; Gore 2004) that allows them to appear as the defenders of the majoritarian sons of the soil; and simultaneously, this modus operandi makes them appear as victims – one of the understudied repertoires used by populists. Once in office, the police also play an important role by allowing vigilante groups loyal to the populist leader to attack minorities (also sometimes letting them indulge in rioting) and to establish a form of majoritarian cultural policing.

In India, the police being a state subject, we will analyze this collaboration at that level first by focusing on the way Narendra Modi related to the police forces when he was Chief Minister (that is head of the government) of Gujarat,[2] between 2001 and 2014. Modi is national populist *par excellence*: he's a pure product of the Hindu nationalist movement whose ideology presents Hindus as the descendants of the original people of India, considering the Muslims and the Christians as migrants who are bound to become second-class citizens if they do not pay allegiance to the Hindu identity of the nation. In addition, Modi has also adopted a purely populist style by claiming that, as a plebeian coming from a "backward caste" and a poor family, he would defend the people against the establishment, and, in particular, the "dynasty" of the Nehru-Gandhi families. A charismatic orator, he has also used the most sophisticated means of communication, including social media, to relate directly to the people, emancipating himself from his party to some extent.

In this chapter, I would like to emphasize another facet of Modi's national populist strategy, which relied on his techniques of victimization and the use of

vigilante groups, two dimensions that made some collaboration with the police necessary.

Polarization-cum-Victimization: "Fake Encounters" in Modi's Gujarat

The most well-known strategy of national populists is probably their constant attempts to polarize society along ethnic or ethnoreligious lines in order to appear as the protector of the majority, their people. This strategy fits within a politics of fear – the fear of the Other which is often exacerbated by vitriolic speeches – and results in communal violence. In Gujarat, this scenario unfolded in 2002, when about 2,000 people died in an anti–Muslim pogrom when Modi was Chief Minister.[3] The role of the police during this episode was well documented, as many researchers have shown, based on first-hand testimonies, that the men in uniform let Hindu nationalist activists attack Muslim neighborhoods. What is not so well-known is the way this *modus operandi* was adapted to the post–pogrom circumstances with the help of the police.

Polarizing by Other Means: The Politics of Fear

After the 2002 mass violence which had caused protests across India and even abroad – to such an extent that Narendra Modi was not issued visas to visit the US and Europe – the government of Gujarat pursued the same politics of fear by other means, "fake encounters."

In India, the expression "fake encounters" designates extrajudicial killings in which the police execute people who, they claim – most of the time wrongly – to be threatening them or to flee in spite of summons.

> A police encounter is a term used in India as a shorthand for dubious police actions resulting in the killing of person(s) whom the police allege to be criminal(s), but where police narratives of exchange of firing and self–defense appear to be prima facie unbelievable.
>
> *Jagannathan, Rai, and Jafrelot 2020, 465*

In Gujarat, between 2002 and 2006 a series of such encounters resulted in the killing of several young Muslims presented as Islamists. In 2012, ten years after the first one occurred, the Supreme Court heard a Public Interest Litigation case filed by journalist B.G. Verghese and lyricist Javed Akhtar in 2007 and recognized the need to probe 21 such "encounters" (Times of India 2012; see Amnesty International 2007), including the famous Sadiq Jamal, the Ishrat Jahan, and the Sohrabuddin cases. The Court appointed Justice Bedi at the helm of a Special Task Force for investigating the case (Sebastian 2019).[4] The Bedi Committee report

gives detailed information about the first case listed above, a fake encounter that took place in January 2003 in Ahmedabad:

> As per the police version the deceased had come in contact with Muslim Jehadi organizations and on the basis of a passport illegally obtained from Bhopal had got one month's visa to visit Pakistan, had gone, stayed there, and had [sic] in that country for three years during which period he had obtained training in weapons from the Jaish-e-Mohammad at Places such as Karachi, Lahore, Rawalpindi, etc. and had thereafter re-entered India through Nepal with the assistance of the ISI [Inter-Services Intelligence, the intelligence service of Pakistan] and established hideouts in Mumbai, Rajkot, and Bhopal, etc. It is further [sic] the police version that after the attack on the Akshardham Mandir, the deceased had been directed by Rizvan of the Jaish-e-Mohammad who was a resident of Pakistan to go to Ahmedabad and kill the then Chief Minister Mr. Narendrabhai Modi.[5]

Referring to the medical and other reports, the Bedi Report stated that the police officers who killed Sameer Khan "were close and towering over the deceased and he was probably sitting on the ground and perhaps cringing for his life" (ibid., 208). Justice Bedi concluded "the killing of the deceased was indeed the result of a fake encounter. I am, therefore, of the opinion that Inspector K.M. Vaghela and Inspector T.A. Barot at the first instance be prosecuted for murder…" (ibid., 219).

Sadiq was a house helper working for the gang of a mafia don in Dubai. He was brought back to India by a journalist after a policeman known as an "encounter specialist," Daya Nayak from Mumbai,[6] had told him that he wanted "to oblige a big politician in Gujarat by giving an ISI agent or some similar militant for an encounter killing…." The journalist had only one more thing to do: to write an article presenting him as a member of the gang of Dawood Ibrahim who "had come to India on the contract of LeT (Lashkar-e-Taiba)[7] for eliminating Gujarat Chief Minister Narendra Modi" (Sinha 2009).

The "Ishrat Jahan case" refers to an encounter that took place on June 15, 2004 on the Ahmedabad to Gandhinagar Road. Four people were killed by a team of the Detection of Crime Branch of the Ahmedabad City Police. They were presented as jihadists targeting Narendra Modi in the First Information Reports (FIR) that the police filled in June 2004:

"I, JG Parmar, Police Inspector, Crime Branch, Ahmedabad City, declare in person that I am working in the Crime Branch since 11/06/2002, and lodge my complaint as follows:

> Pakistan-based terrorist outfits like Lakshar-e-Toiba and Jaish-e-Mohammad are very active in India in association with the ISI of Pakistan for quite some time with the intention to spread terrorism in India. Especially after the

Godhra train tragedy and the communal riots that followed, they have made Gandhinagar and Ahmedabad City their main targets.

About 15 days back, Shri K.R. Kaushik, Commissioner of Police, Ahmedabad City, received information from intelligence sources that two Pakistani *fidayeens* had left from Kashmir for Ahmedabad by different routes. […] They aim to attempt a suicidal attack on Shri Narendra Modi, Chief Minister of Gujarat." (Jagannathan, Rai, and Jaffrelot 2020: online Appendix A1, the English translated version of the "FIR of Ahmedabad City Department Crime Branch" 2004).

According to the police, the car of the terrorists was intercepted in Ahmedabad and the four occupants were killed when they opened fire on the policemen who were trying to apprehend them.

The case is known as the "Ishrat Jahan case" because one of the four victims was Ishrat Jahan, a 19-year-old college girl who was studying for her B.Sc. in Mumbai, at the Guru Nanak Khalsa College. After the encounter, the Gujarat police claimed that they were Pakistanis. But in 2009, the Metropolitan Magistrate, S.P. Tamang, submitted in the Metropolitan Court of Ahmedabad a report indicating that the Pakistan IDs that had been found on the corpses were forged[8] and that the four people had, in fact, been shot with bullets fired from a close distance, while they were sitting, that they had been held in custody for days before the fake encounters and that weapons – including an AK–56 – had been planted to make people believe that they were terrorists (Jagannathan, Rai, and Jaffrelot 2020: online Appendix A2, English translated copy of Tamang's Magisterial Enquiry Report). Tamang gave the names of several senior policemen as being implicated in the fake encounter: Dahyaji Gobarji (D.G.) Vanzara, the chief of the Detection of Crime Branch, Narendra K. Amin, the then deputy of the latter, K.R. Kaushik, who was then the Ahmedabad Police Commissioner, P.P. Pandey, who was then the chief of the Crime Branch, and Tarun Barot whose name has already been mentioned in relation to the Sadiq Jamal case (Dasgupta 2009; Desai 2013; Express News Service 2013).

The government of Gujarat objected that the policemen accused of "fake encounters" had been unable to argue their case. The matter went to the High Court which appointed a Special Investigation Team. On November 21, 2011, the Special Investigation Team (SIT) reported to the High Court that the encounter was not genuine. Ishrat Jahan and Javed had been intercepted by the Gujarat police a few days before the encounter from a toll booth near Anand and held on a farm nearby (Jagannathan, Rai, and Jaffrelot 2020: online Appendix A3, copy of the FIR filed by the SIT). The Court ordered that a charge of murder should be filed against 20 policemen.

These fake encounters illustrate the mechanisms of the politics of fear. In order to polarize Gujarat society, Hindu nationalist political entrepreneurs found it convenient to cultivate a sentiment of vulnerability among their coreligionists *vis-à-vis* jihadis and Pakistan (a bordering state) to appear as their saviors. In Modi's Gujarat, this strategy was followed in the wake of the pogrom that had already resulted in

the "otherization" (and even demonization) of the Muslims. The Bharatiya Janata Party (BJP)[9] was eager to cultivate the atmosphere that had been created by this tragic episode without resorting to mass violence again. A human rights activist speaking under the condition of unanimity makes this point very clear:

> The BJP Government in Gujarat knew that it could not risk another riot similar to 2002, as its credibility to govern efficiently and maintain communal harmony would be completely eroded. At the same time, it was important to sustain the sharp polarization between Hindus and Muslims for electoral gains. The Government used the encounters as a proxy for the riots to reproduce polarization between Hindus and Muslims. The police encounters that took place in Gujarat were spectacles. The public consumed the media accounts of these encounters and started fearing Muslims and Islamic terror.
>
> *Jagannathan, Rai, and Jaffrelot 2020, 474*

Facets of Victimization

In addition to fear, the encounters were intended to foster a feeling of compassion *vis-à-vis* Narendra Modi, who appears here as a victim. Victimization is one of the driving forces of populism: supporters of the populist leader sympathize with him because he fights against the same establishment whose domination they resent themselves. Modi already appeared as a victim for three reasons. First, Modi was a victim of the social order given his family background (he belongs to a low caste and came from a rather poor *milieu*). Modi made copious use of his lowly social background to distinguish himself from the Nehru/Gandhis whom he continued to depict as monarchical heirs who held the underprivileged in contempt. He now called Rahul "Mr. Golden Spoon" (The Hindu 2013). He laid into Priyanka Gandhi, Rajiv and Sonia's daughter, whose popularity – partly due to her resemblance to Indira – was a source of concern for the BJP. Modi explained in a rally that the only reason she was in politics was out of filial piety. Priyanka retorted that the level of such a remark was "low," a word Modi immediately – and tactically – interpreted as a reference to his caste. In a television interview with Arnab Goswami, he went on the defensive:

> …don't I have the right to at least state the truth? Is it because I come from a humble background, from a humble family? Has this country become like that? Has my democracy submitted itself to one family? And when a poor man says something, there is uproar.
>
> *Mid-Day 2014*

Second, he claimed that the New Delhi government did not respect him. In the years 2001 to 2014, Modi sought to incarnate Gujarat *in opposition to* the

central government in New Delhi. As head of a peripheral state, he cast himself as a victim.[10] "I have been facing negativism of the center at every front. It often appears as if they are dealing with an enemy nation when it comes to Gujarat" (Singh 2013). His victimhood rhetoric reached new heights during the 2012 election campaign in which Modi claimed, "Of all the Chief Ministers that the country has seen in the last 60 years, I have suffered the maximum injustice at the hands of the center" (Express News Service 2012a).

Third, because of the way he was treated by the liberals, in particular the English-speaking media which arraigned him because of the pogrom. Pramod Singh, an avid television watcher, found out about Modi through television, in a very significant fashion, in that regard:

> After the 2002 riots when the media and other political parties started blaming Modiji, thousands of people like us – now it must be crores of us – started becoming staunch supporters of Modi. *The more you blamed him, the more of our support he gained*.
>
> *Bhatt 2014, my emphasis*

A founding incident, from this standpoint, occurred in 2010 on NDTV[11] when Kiran Thapar, a CNN reporter, began an interview with Modi by talking about the violence in 2002 and a defensive Modi could not come up with a retort and even walked off the set.[12] To be sure, Singh subscribed to Hindu nationalism, but what brought him even closer to Modi was the way the people from Delhi (where the television studios are located), all English speakers belonging to the secularist, modern elite, denounced the pogrom. Many Indians who also perceived them-selves as victims of society, and hence the elite, could identify with Modi.

And now, the encounters showed that he was also targeted by Islamists, his worst enemies in post-2002 Gujarat, those he had kept at bay and punished for Godhra in the opinion of his supporters. This tactic emerges clearly from the fieldwork done by Prashant Jha in Uttar Pradesh in 2017. His conclusions highlight practices initiated many years before. One local BJP leader explained to him how the party sought to portray Hindus as the victims of Muslims and those who protected them politically, especially since Muslim butchers continued to slaughter cows: "The point is to show we are the victims. This will get Hindus angry. They will then realize they have to unite against the Muslims" (Jha 2017). The same BJP leader thus justified the "pink revolution" theme Modi introduced in the 2012 Gujarat election campaign to denounce the slaughtering of bovines:

> When you think of these slaughterhouses, what images come to your mind? I think of Muslim butchers, cow slaughter and blood on the streets. I think of how the Muslims have taken over our public life, how they are destroying our culture and lifestyle, of how there are chicken and meat shops

everywhere, and how they have become rich doing this. By raising it, we want to wake up the Hindu, get him angry.

Jha 2017, 166

This repertoire of victimization offers an illustration of Pierre Ostiguy's theory of populism. The repertoire of victimization is all the more powerful when the political *establishment* is perceived as betraying the people. But on the other hand, as Pierre Ostiguy aptly demonstrates, populists exhibit exceptional virtues through constantly staged performances (especially in the media), drawing on a performative repertoire. As a result, "the leader is both *like me* […] *and* an ego *ideal*" (Ostiguy 2017, 74).

The Sohrabuddin Encounter Case

Policemen play a major role in this strategy, not only because they are responsible for the encounters, but also because they are the ones who speak to the media. And the press conferences which take place after each encounter are followed with rapt attention. In his report, Tamang attributes the attitude of the policemen to "their personal interest which included to secure their promotion, to maintain his [sic] posting, so as to falsely show excellent performance, to get special appreciation from the Hon'ble Chief Minister and to gain popularity" (Jagannathan, Rai, and Jaffrelot 2020: online Appendix A2, English translated copy of Tamang's Magisterial Enquiry Report). But policemen would not have behaved the way they did, talked to the media, and remained unpunished if they did not benefit from political protection. In fact, policemen and politicians were partners in crime. For instance, the Central Bureau of Investigation (CBI) "recorded testimonies of other police personnel who stated that Vanzara had already got the approval of the then Chief Minister, Narendra Modi, and the then Home Minister, Amit Shah, to carry out Ishrat Jahan's fake encounter" (Jagannathan, Rai, and Jaffrelot 2020, 469). Similarly, the Inspector of Police, Tirth Raj, who investigated the case of Sameer Khan concluded that not only "the deceased had been killed in a fake encounter, but on instructions from the then Minister of State for Home and Law and Justice [Amit Shah] and the Director General of Police (DGP) Chakraborty."[13] According to Justice Bedi, his "report and all inculpatory material had been destroyed" when he reinvestigated the case himself. The involvement of key members of the Gujarat government in fake encounters became even more obvious in the "Sohrabuddin case."

Sohrabuddin Sheikh was part of the underworld – probably linked with Dawood Ibrahim's gang – when he was killed in an allegedly fake encounter on November 26, 2005. He was known in particular for extorting protection money from marble factories in Gujarat and Rajasthan. He was traveling by bus with his wife, Kauser Bi, on November 23, 2005, between Hyderabad (Andhra Pradesh) and Sangli (Maharashtra) when their bus was stopped by the Gujarat Police Anti-Terrorist

Squad (ATS). His wife was taken to a farmhouse outside Ahmedabad and he was killed a few days later on a highway at Vishala Circle near Ahmedabad. Kauser Bi was cremated in Illol (Sabarkantha district), the native village of D.G. Vanzara (Rediff 2007, Press Trust of India 2010). Sohrabuddin was immediately described as a terrorist by D.G. Vanzara, who by then had been promoted to Gujarat's ATS chief. He held a press conference to explain that Sohrabuddin was an LeT jihadist who wanted to assassinate Narendra Modi (First Post Staff 2013). But the younger brother of Sohrabuddin, Rubabuddin, petitioned the Supreme Court in December 2005, in spite of intimidation (Ahmed 2010), claiming that his brother had been killed in a fake encounter, while an investigative journalist, Prashant Dayal, gathered important revelations from policemen who had participated in the fake encounter and which were published in *Divya Bhaskar* (a Gujarati newspaper) in 2006 (Rediff 2013). It seems that influential figures in Rajasthan who were paying protection money to Sohrabuddin wanted rid of him. Interestingly, they contacted the Gujarat police after the 2003 and 2004 fake encounters mentioned above. Some police officers probably thought that they would kill two birds with one stone: they would deal with a notorious extortionist and claim that they were also protecting the state from a terrorist.

In March 2007, the Supreme Court ordered the Criminal Investigation Department to probe the case. Inspector-General Geeta Johri – Gujarat's first woman officer (NDTV 2010) – was tasked with reporting to the Court. She gathered enough evidence to enable Deputy Inspector-General (DIG) of police, Rajnish Rai, who was formally in charge, to arrest three accused on April 24, 2007: D.G. Vanzara, who had become DIG Border Ranges soon before (Umat 2013), Rajkumar Pandian, Superintendent of Police with the Intelligence Bureau, and M.N. Dinesh, a police officer from Rajasthan (he was the then Superintendent of Police of Udaipur district). In May 2007, Geetha Johri submitted a report in which she mentioned "the collusion of [the] state government in the form of Shri Amit Shah, MoS for Home [Minister of Home Affairs]" and said that this case "makes a complete mockery of the rule of law and is perhaps an example of the involvement of [the] state government in a major crime" (Vyas 2007). Johri was then told to suspend the inquiry.[14] The Supreme Court reinstated her but, eventually, in January 2010, directed the CBI to take over the investigation. The reasons for this decision were similar to the previous ones:

> We feel that police authorities of the state of Gujarat failed to carry out a fair and impartial investigation as we initially wanted them to do. It cannot be questioned that the offenses the high police officials have committed was [sic] of grave nature which needs to be strictly dealt with.
>
> *Express News Service 2010a*

In July 2010, the CBI filed a 30,000-page long charge sheet that resulted in the arrest of several additional policemen and Amit Shah. The MoS for Home was

accused of being implicated not only in the fake encounter targeting Sohrabuddin, but also in an extortion racket (India News 2010), a clear illustration of the nexus between criminals, police officers, and politicians in Gujarat (Ayyub 2010).

Among other things, the Court was frustrated by the fact that the Gujarat police had failed to analyze the call records properly (Express News Service 2010b). When the CBI was finally in a position to scrutinize the hundreds of phone calls Amit Shah had exchanged with the policemen accused in the fake encounters mentioned above, the Bureau was also able to implicate them in one more encounter, involving Tulsiram Prajapati.[15]

The CBI had Amit Shah arrested in July 2007. He was one of Narendra Modi's most influential lieutenants, as is evident from the fact that he was charged with ten portfolios in the Gujarat government (Jose 2012), including the Ministry of State for Home. In September 2013, Vanzara – who was still in jail – resigned from the Gujarat police. In his resignation letter he said that he had suffered silently so far

> only because of my supreme faith in and highest respect for Narendrabhai Modi, the Chief Minister of Gujarat, whom I used to adore like a God. But I am sorry to state that my God could not rise to the occasion under the evil influence of Amit Shah.
>
> *Biharprabha News 2013*

He interestingly wrote that he assumed that "Mutual protection and reciprocal assistance was the unwritten law between police and government in such cases." Indeed, Vanzara had benefited from the government's benevolent attitude: in only five years, in 2002–2007, he was promoted from Deputy Commissioner of Police in the Crime Branch of Ahmedabad city to that of Deputy Inspector-General of Police, ATS, Ahmedabad, and then Deputy Inspector-General of Police, Border Range, Kutch-Buj. However, his expectations were disappointed after his arrest and that of his men – since, as he says, most of the 31 policemen under arrest had "served under me as my juniors in the past":

> With the passage of time, I realized that this government was not only not interested in protecting us but it also has been clandestinely making all efforts to keep me and my officers in the jail so as to save its own skin from CBI on one hand and gain political benefits on the other. It is everybody's knowledge that this government has been reaping very rich political dividends, since last 12 years, by keeping the glow of encounter cases alive in the sky of Gujarat...

The last sentence confirms that the government of Gujarat was instrumental in perpetrating fake encounters to cash in on the politics of fear – the fear of jihadists who were allegedly after Narendra Modi – and victimization.

If fake encounters were, indeed, "the conscious policy" of the Gujarat government, the real guilty men were politicians and the policemen simple executors of that policy. Between 2002 and 2006, fake encounters helped the Modi government to maintain Gujarat in an atmosphere of fear – a fear attributable to the Islamist threat.

To sum up, in this section, we have shown, so far, that the Modi government established a very specific relationship with the police. They were partners in crime in two different ways. First, the government rewarded the officers who had shown some communal bias during the pogrom and rewarded the others. Second, the series of fake encounters mentioned above created (or reflected) new forms of illicit relations which were probably unprecedented in India – and which were to become more systematic across the country after Modi became Prime Minister in 2014.

Narendra Modi, Amit Shah, and the Policing of India: The Gujarat Model and Sequel

How to Control the Central Bureau of Investigation and the National Investigation Agencies?

The ways through which Modi and Shah were targeted by the CBI[16] and the National Investigation Agencies (NIA) in Gujarat largely explains why they focused on these two institutions to make them give up several cases (including those related to fake encounters) so they could use these institutions against opponents.

Immediately after taking over as Prime Minister, Modi tried to appoint policemen who had worked for him in Gujarat to top positions of the CBI. In 2015, Y.C. Modi was appointed additional CBI Director (Sengupta 2022). Y.C. Modi had helped the then Chief Minister when he was part of the SIT that had probed Narendra Modi's role in the Gujarat pogrom in 2002 and investigated the murder of Haren Pandya.[17] He was part of the team of investigators which had announced that Pandya had been assassinated in a joint operation between Pakistan's Inter-Services Intelligence, Lashkar-e-Taiba, and the Dubai-based underworld don Dawood Ibrahim. Twelve Muslim men had been arrested and charged with Pandya's murder, but eight years later, in September 2011, the Gujarat High Court had to acquit every single one and throw out the entire case. "The investigation has all throughout been botched up and blinkered," the judge said (Jose 2012; Naved 2011).[18] This episode had helped the Gujarat Modi to maintain an atmosphere of fear and polarization.

In 2016, another policeman from Gujarat, Rakesh Asthana, was appointed additional director of the CBI. He had also been part of the SIT. The CBI, as an institution, resisted and Asthana could not be confirmed (Siddiqui 2016). Instead,

Alok Verma, the then Delhi Police Chief, was appointed CBI Director. However, in 2017 Asthana was appointed "special director" of the CBI in spite of opposition from Alok Verma himself (Singh 2017). The Supreme Court dismissed the plea challenging Asthana's appointment as CBI special director after the central government defended him by referring to his "outstanding career" (Express Web Desk 2017). Then, the CBI Director Alok Verma accused Asthana of corruption (see The Wire 2018a) – and the latter did the same *vis-à-vis* the former. The government sent both on indefinite leave in late October 2018 (The Wire 2018c).[19] On January 7, 2019, the Supreme Court reinstated Alok Verma as CBI Director, but his authority was confined to "ongoing routine functions" until a meeting of this committee, henceforth called "the PM committee" (sic), could decide. The "PM committee" was formed immediately to decide the fate of Alok Verma. Chief Justice Ranjan Gogoi nominated Justice Sikri to represent the Supreme Court there. Two days later, the committee headed by Prime Minister Narendra Modi removed Verma from the post of CBI Director on January 10 "on charges of corruption and dereliction of duty" (India Today 2019b). Alok Verma took early retirement immediately and wrote a letter whose second paragraph is worth citing:

> Institutions are one of the strongest and most visible symbols of our democracy and it is no exaggeration that the CBI is one of the most important organizations in India today. The decisions made yesterday will not just be a reflection on my functioning but will become a testimony on how the CBI as an institution will be treated by any government through the Central Vigilance Commission (CVC), who is appointed by majority members of the ruling government. This is a moment for collective introspection, to state the least.[20]

The appointment of bureaucrats who had worked with Narendra Modi in Gujarat at the helm of other institutions was much quicker. The NIA is a case in point. Y.C. Modi, who had been an additional director of the CBI between 2015 and 2017, then took charge of the NIA, for instance.

Why was it so important for Modi and Shah to control the CBI and the NIA? Primarily to escape prosecution concerning fake encounters as the situation was tense on that front in 2014. The Sohrabuddin case was the most problematic in that sense. Soon after the 2014 elections, Shah was supposed to appear before the judge of the CBI Court in charge of the trial, Justice Utpat, on June 6, 2014 – but he did not show up. The judge was transferred and replaced by Justice Loya, who died in Nagpur on December 1, 2014. While the hospital where he passed away attributed his demise to a heart attack, journalists from The Caravan who investigated the case persistently discovered that the postmortem had not been performed following standard practice (Dev 2018) and learned from interviews with one of Justice Loya's sisters that he had "confided to her that Mohit Shah,

then the chief justice of the Bombay High Court, had offered him a bribe of Rs 100 crore (13,333,333 US dollars) in return for a favorable judgment" (Takle 2017a; 2017b). Lawyers immediately considered that the "suspicious death" of Judge Loya needed to be investigated (Kumar 2018). But Loya's successor in the CBI Court disposed of the case in less than a month. On December 30, 2014, he discharged Amit Shah based on the charge sheet alone, without the evidence being heard – and concluded that Amit Shah had been framed for "political reasons" (Mander and Naved 2018). Among the accused, 11 others, including six police officers from Gujarat, were discharged in 2015–2016, including Vanzara, either for lack of evidence or for lack of sanction to prosecute (Janwalkar and Bhasin 2018). What was rather exceptional was the fact that the CBI did not appeal the discharge of persons it had charged in a criminal matter (Mander and Naved 2018). In the case of Vanzara, the CBI even made its stand clear before the Court that it was not opposing his discharge even though the organization, originally, had brought the charges and conducted the investigation (Noor 2018, Sailee 2018).

There were only 22 accused left, but the CBI abstained from protecting the witnesses who turned hostile one after the other. By April 2018, 45 of them had turned hostile (Modak 2018b), and the trend continued (Scroll 2018, Press Trust of India 2018a). The High Court judge in charge of the case arraigned the CBI for not providing adequate protection for witnesses who might be subjected to intimidation or inducement by the accused or their party (Press Trust of India 2018a) and for failing "to put all evidence on record including the prima facie evidence." The judge was transferred (The Wire 2018b). Finally, 92 out of the 210 witnesses who were examined during the trial turned hostile – and the most important ones were among them (Press Trust of India, 2018c). The witnesses who had resisted such pressure "only partially supported the prosecution's claims" (Shanta 2018) and others were not allowed to testify (ibid. 2018). Rajnish Rai, Sandeep Tamgadge (two police officers who had been punished by the CBI for their lack of professionalism),[21] and V.L. Solanki, the police officers who had first investigated the case, were not examined.

Finally, in December 2018, Justice Sharma came to the same conclusion as his predecessor, Justice Gosavi, in the case of Amit Shah: the investigation that the CBI had pursued in the Sohrabuddin case was politically motivated (Modak 2018a). The 22 accused were acquitted, including 14 policemen from Gujarat and 6 policemen from Rajasthan (Press Trust of India 2018b). Once again, in a very unusual manner, the CBI did not file an appeal despite the humiliating way its investigations had been castigated by the judges. The organization had fallen in line.

By 2019, Modi and Shah were not only fully in control of the state apparatus, but relegitimized by the general elections which gave once again an absolute majority to their party, the BJP. Immediately, they had major bills passed, including the Citizenship Amendment Act, which made only non-Muslim refugees eligible for

Indian citizenship. In reaction, opponents (Muslims and non-Muslims) mobilized in the street. The government then employed BPJ state-governed police forces including in Delhi, a territory that does not enjoy full statehood and whose police reported to the Home Minister, Amit Shah since the 2019 election.

The Delhi Riots: Emulating the "Gujarat Model"

The role of the police in the communal riots that took place in February 2020 in North East Delhi calls to mind what happened in Gujarat in 2002. Certainly, violence was triggered by Hindu nationalist activists who targeted anti-CAA[22] protesters and who tried to polarize voters along religious lines before the local elections. But the police let them attack Muslims and even joined hands with them. For four days, until curfew was imposed, North East Delhi saw a scenario unfold that had been observed before elsewhere, including in Gujarat in 2002 − but on a smaller scale.[23] Thousands of assailants, led by Hindu nationalist cadres, including BJP former or sitting members of the legislative assembly (MLAs) and municipal councillors (Singh 2020), came from outside the locality to help the local activists. They forcibly entered houses to attack men and women[24]; 600 houses were burned (Alavi 2020) and shops were looted with a remarkably accurate selectivity, as adjacent houses and shops were spared when they belonged to Hindus[25]; markets were razed to the ground as well[26]; mosques were systematically targeted − they were looted, desecrated, and burned (Mody 2020).

After four days, the official toll was 55 dead, including 13 persons with non-Muslim names (see Fact-Finding Committee 2020, 111−118). Thousands of people had fled and found refuge in relief camps, but many preferred to stay with relatives and friends or returned to their ancestral places − they were therefore not counted as "refugees" (Sinha 2020).

When some police forces came to intervene, they were hailed by the attackers. An eyewitness told the Delhi Minorities Commission (DMC) fact-finding committee that this happened on Karawal Nagar road:

> Mobs from both communities reached the main Karawal Nagar road and started stone pelting at each other. They did not stop at stones, but petrol bombs were also being thrown. There were no security forces to contain the violence. Almost half an hour after this, a Delhi Police vehicle arrived. Seeing the vehicle, the Hindu mob shouting "Jai Shree Ram" and "Bharat Mata ki Jai" started walking forward and at that moment a Delhi Police officer threw tear gas toward the group of Muslim residents. This prompted the Hindu group to start shouting "Delhi Police Zindabad."
>
> *Fact-Finding Committee 2020, 81*

The police attacked women too, in the first place those who were taking part in the Chand Bagh sit-in (Fact-Finding Committee 2020, 65). In the complaints filed subsequently, victims declare that the police also incited the activists to attack them (Singh 2020). Police officers also took part in the looting and destruction of mosques, sometimes while chanting "Jai Shri Ram" (Shroff 2020a; 2020b). One of these attacks, on February 24, 2020, was filmed and the videos went viral on social media. It was narrated to the DMC fact-finding committee by one of the victims who had gone to the Kardam Puri Pulia area in search of his son:

> There he was surrounded by 6–7 policemen who beat him with their boots and sticks on his head, legs and whole body. Thereafter, the police dragged him to Mohalla Clinic on the main road. Three young men who were severely injured were already lying there and bleeding. The policemen threw him at that place. After some time, police brought one more person and threw him near them. Policemen kept beating all five of them with sticks and boots. Police told them to sing "Jana Gana Mana" (national anthem) and directed one Kausar to say "Bharat Mata Ki Jai" (Long Live Mother India). While beating them, the policemen were saying, "You want Azadi? take this Azadi!" One policeman told them that even if they died, nothing will happen to the police officers.
>
> *Fact-Finding Committee 2020, 77*

The five men who were beaten by the police in the Kardam Puri Pulia area were requested to chant the national anthem while being filmed – and beaten. One of them, Faizan, died (Yadav 2020; Lakhani 2020).

Those who filed complaints against the police and BJP leaders for their attitude during the Delhi riots were under huge pressure to withdraw their statements – and these complaints were buried anyway (Singh 2020). Not only could the victims not file a complaint, but they were accused of being responsible for the violence itself (Lalwani 2020). Instead, the narrative promoted after the Delhi riots by the police and the BJP government – both representing two sides of the same coin, that is, the state – consisted in exonerating the police and accusing the Muslims. This "theory" resulted in the drafting of an FIR, the "FIR 59" (from its complete name FIR 59/2020) that accused former Jawaharlal Nehru University (JNU) student, Umar Khalid – who was to be arrested soon after (Press Trust of India 2020) – of having planned the violence with associates who had "collected arms and ammunition while staging protests with women and children" (Pasha 2018; Sharma 2020).

In April, "FIR 59" referred to many more sections of Indian law, including terrorism, rioting, possession of arms, attempted murder, incitement of violence, sedition, murder, and promoting enmity between different groups on grounds of religion. Four of these sections were under the stringent antiterror law, the

Unlawful Activities Prevention Act, 2019 (UAPA), which made crimes non-bailable. Finally, 14 people were accused in this "plot," including many student leaders – mostly Muslim.

Police and Vigilantes

For the national populist leaders, the police also play an important role in the consolidation of their control of society via their vigilante groups. Most of them have conquered power with the help of militias that share their majoritarian ideology. These private armies implement on the ground the program of the leader by exerting a form of cultural policing. In India, the Hindu nationalist movement has a large range of groups of that kind in charge, for instance, of protecting the cow, the sacred animal of Hinduism par excellence that some Muslims are accused of slaughtering. In Delhi's region, and in particular, in the BJP-ruled state of Haryana and Uttar Pradesh, these vigilante groups, armed with field hockey sticks, search trucks likely to be transporting cows and beat up the drivers when they were Muslim. Their actions are illegal but seen as legitimate by the Hindu majority – and by the police which, in any case, obey the BJP government and let the vigilantes patrol. In practice, the vigilantes and the police have even arrived at a division of labor. One of the policemen from Haryana explains:

> We put up checkpoints and wait. The volunteers [vigilantes] keep driving around, and call us when they find something. See, we have a hundred other things to think of beside cows. These guys do the job. It's good, right? now, the administration is also supporting them fully.
>
> *Marvel 2016*

In Haryana, the vigilantes even have organic ties with the state. They act as a community moral police in close relation with a "Cow Protection Task Force" that has been established within the state police apparatus. A female police officer from the Indian Police Service, Ms. Bharati Arora,[27] was appointed to head this network, which now had specialized police officers in each district with brigades composed of 17 persons, including two police sub-inspectors.

Conclusion

This chapter has described three mechanisms of the politics of fear as practiced by the right-wing populist movement led by Narendra Modi, Chief Minister of Gujarat from 2001 to 2014 and Prime Minister of India from 2014 to the present. In Gujarat, police encounters with presumed Muslim terrorists were staged to make the state government appear to be protecting the Hindu majority and to present Chief Minister Modi as a victim of Muslim terrorism. In New Delhi, the Prime Minister appointed loyalists to the CBI and the NIA, national police

organizations in order to protect himself and his inner circle from prosecution for the fake encounters staged in Gujarat. And in Delhi the police allowed militias to use violence to attack and intimidate minorities in a form of extrajudicial cultural policing.

The processes described here illustrate how Hindu national populism has used the police to polarize society along ethnoreligious lines by stimulating fear and then assuming the role of the protectors and saviors of the supposedly threatened and morally blameless majority. They also allow the leader, his inner circle, and his followers to appear as righteous victims, and in the case of the leader, a man of the people who is unfairly vilified by the overprivileged and morally questionable leaders of "the establishment." In this strategy, Muslims and other minorities are "othered" in order to further the cohesion and potential for mobilization of the dominant group. Consistent with Pierre Ostiguy's theory of populism, national populist leaders in India demonstrate their virtue through performative acts, especially in the media. In the case of Narendra Modi, his performances signal that he is like the members of the Hindu majority but at the same time more virtuous, stronger, and more deserving of reverence than they are. As we shall see in Chapter 11, these processes and patterns are strikingly similar to those found in Brazil under the national populist President Jair Bolsonaro, where even the use of the police has affinities with the use of the police by the Modi government.

Notes

1 The notion of national populism has been introduced by Germani (1978) to designate a form of populism where the people represented were the ethnic majority or the sons of the soil.
2 Gujarat is a state located in the western coast of India.
3 In February 27, 2002 a train carrying back Hindu activists was set in fire, leading to the death of 57 Hindus, including women and children in Godhra, a district headquarters in eastern Gujarat. The sequence of events as well as the cause of the accident is a contentious issue (Mehta 2006). The incident spurred sectarian violence and riots and contributed to Muslim–Hindu tensions, leading to the death of at least 2,000 people. For a more complete analysis, see Jaffrelot (2003).
4 In 2010 Justice Vyas was the first choice of Narendra Modi for the post of Gujarat Lokayukta, the Parliamentary Ombudsman for the state of Gujarat, but the Governor had rejected him – as we shall see later.
5 See Writ Petition (Criminal) No. 31 of 2001 (B.G. Verghese etc. vs. Union of India and others) with Writ Petition (Criminal) No.83 of 2007 (Javed Akhtar and anr. vs. State of Gujarat & others) 2007, 193. Final Report by Justice H.S. Bedi (former Judge, Supreme Court of India), Chairman, Monitoring Authority, Ahmedabad (Gujarat), known as "The Justice Bedi Report."
6 Sub-inspector of police Daya Nayak has become one of the specialists of encounters of the Maharashtra police in Mumbai. In the early 2000s, he was known for having killed more than 80 criminals (Rediff 2003). However, he was suspended in 2006 because he had amassed wealth disproportionate to his income. He has been reinstated in the Maharashtra police in 2012 (India TV News 2012).

7 Lashkar-e-Taiba or Army of God, an Islamic Pakistan-based group focused on eliminating Indian power on Kashmir and Jammu.

8 In November 2013 the CBI sent a Letters Rogatory to Pakistan to gather Information on Rana and Johar Ishrat (Press Trust of India 2013).

9 The Bharatiya Janata Party (BJP) was created in 1980 that spouses a posture toward Hindu nationalism. To the moment, it is one of the biggest in terms of representation in the parliament and in terms of party membership in the country.

10 Narendra Modi probably played the victim all the more easily as the United States and the European Union had cancelled his visa and denied a new one in the wake of the pogrom.

11 New Delhi Television became Modi's *bête noire* in 2002 after uncompromising reports the channel aired about the program. NDTV journalists were set upon and some of their vehicles destroyed (Valiani 2011, 184).

12 This key moment can be seen on YouTube (see CNN 2010, 3:05).

13 See Writ Petition (Criminal) No. 31 of 2001 (B.G. Verghese etc. vs. Union of India and others) with Writ Petition (Criminal) No.83 of 2007 (Javed Akhtar and anr. vs. State of Gujarat & others) 2007, 212. In his report, Tirth Raj also indicted "persons from the Chief Minister's office" (ibid., 214). The information compiled in the report of Tirth Raj was also part of what he told Ashish Khetan in the course of a sting operation.

14 According to the CBI, "Following instructions from Shah, Johri directed investigating officer V.L. Solanki to make changes in the enquiry papers and to prepare a report" (Express News Service 2012b).

15 Prajapati, who was part of the same network of extortionists, had witnessed the killing of Sohrabuddin and some of his accomplices in the police as well as politicians feared that he might blackmail them. Accused of involvement in another murder, Prajapati was jailed in Udaipur, when he was transferred to Gujarat after the Ahmedabad police issued a summon to the Rajasthan police in order to present him in some other case in an Ahmedabad court. On his return, he was murdered on December 26, 2006 in a fake encounter in Banaskantha (Ayyub 2010).

16 The Indian equivalent to the Federal Bureau of Investigation (FBI).

17 Haren Pandya had been killed on March 26, 2003 in a mysterious manner. In September 2013, D.G. Vanzara, the Gujarat police officer who had originally investigated the Pandya murder, indicated before the CBI as a political conspiracy behind the killing of Pandya (Gagdekar 2011, Times of India 2013). A few weeks before Vanzara's statement the CBI "found that three men are common to cases pertaining to the assassination of BJP leader Haren Pandya and the encounters of Ishrat Jahan and Sadiq Jamal…" (Jha 2013).

18 In 2015 Arun Kumar Sharma, another IPS officer of the Gujarat, was transferred to the CBI as joint director. According to "highly placed officials" of the CBI, Narendra Modi wanted to give him the key charge of Policy Division (known as JPC), making him the number two of the CBI. Sharma, however, had a controversial past. He was one of the Gujarat police officers who had been accused of derailing the investigations into the killing of Ishrat Jahan in 2004. The post of "special commissioner" of the Ahmedabad Detection of Crime Branch had been created for him. The then CBI Director, Anil Sinha, refused to appoint him JPC (Jha 2015).

19 The CBI Director was allegedly eased out – on the recommendation of a secret CVC interim report – because he had met Prashant Bhushan, Arun Shourie, and

Yashwant Sinha, the three public figures who had filed a complaint at that time, urging the CBI to investigate the Rafales deal on the grounds of suspected corruption (Sharma 2018).

20 "Justice (Retd) Patnaik [who was] not on same page as CVC, claims Alok Verma, ousted CBI chief in his resignation letter (National Herald India Web Desk 2019).

21 While the latter is facing two cases that – he claimed – have been fabricated, the former has been suspended from service, after the government refused his application for early retirement.

22 The Citizenship Amendment Act (CAA) was approved by Indian Parliament on December 11, 2019 amending the Citizenship Act (1955). It was a controversial bill allegedly designed to grant Indian citizenship to religious minorities that fled prosecution from Pakistan, Bangladesh, or Afghanistan. Following its enactment, it was followed by anti-CAA protests, calling upon its discriminatory grounds against Muslim community.

23 In contrast to what happened in Gujarat, the assailants allegedly belonged to upper castes. Sagar, a journalist working for *The Caravan*, reported: "Many men among them wore t-shirts that had 'Brahman', 'Jat', and 'Jai Shri Ram' written on them and from my conversation with them I gleaned that many of them belonged to other upper castes such as Rajputs and Baniyas" (Sagar 2020). During the riots, Kapil Mishra and his supporters, in his speeches and in their slogans, arraigned the Dalits: "Beat the Dalits" was one of their mottos and he said: "Those who clean the toilets of our homes, should we now place them on a pedestal?" (Singh 2020).

24 Women were assaulted in many different ways. The DMC fact-finding committee devotes a full section of its report to this issue (Fact-Finding Committee 2020, 61–68).

25 A businessman who happened to be a BJP cadre said that his factory had been burnt because he had a "Muslim name," suggesting that, as in Gujarat in 2002 the rioters were using lists of residents – maybe the voters lists (Express News Service 2020).

26 In Tyre Market the fire brigade which had rushed to the place was attacked physically (Fact-Finding Committee 2020, 48).

27 Arora justifies the fight against cow slaughter by explaining that the money earned from it is used toward terrorism (Mohan 2016). Two years later, the Home Minister order an investigation of Ms. Arora due to accusations of harassment by one of her subordinates (Yadav 2020).

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11

BOLSONARO'S BRAZIL

National Populism and the Role of the Police

Renato Sérgio de Lima

The emergence of far-right and authoritarian populism represented by President Jair Bolsonaro needs to be seen as an effect and not only as a cause of the moment of democratic deconsolidation and illiberalism experienced by Brazil. This moment has enormous potential for contagion and undermining of police institutions, but its strength has historical origins. Many of the changes that took place after the re-democratization of the country in 1985 did not prove sufficient to disrupt practices strongly rooted in the culture of violence and control of the "domestic enemy" that govern social relations in Brazil. In public security, the public policies implemented after the 1988 Constitution, a milestone in the country's re-democratization, were not capable of carrying out a project of democratizing reforms of the police. The democratic wager contained in the Constitution showed us, in several areas, the civilizational gap that we needed to overcome to expand and guarantee citizenship and a living for the population, in other words, to guarantee justice and fairness. In the realm of police activity, however, the traumas of the authoritarian past have shown themselves to be resilient and persistent. We did not face our fears. For over 30 years there have been attempts to modernize institutional architecture, but they have not reached the core of the perverse system that reproduces organizational cultures, operational standards, and conceptions of public and social order that, if not explicitly grounded in violence, accepts it as the common language of our social relations and the state-society nexus (Lima 2019).

We reproduce a wider Latin American cycle of living with high rates of violence. In 2019, Brazil, which has 2.7% of the world's population, corresponding to 15.9% of total deaths, in 2020, the percentage became 20.4% – according to DataUNODC, there was a growth of almost 31% in the number of deaths in the two years in Brazil. This means the country, and most other Latin American countries – Mexico, for example, was the third country with the most deaths

in absolute numbers, behind only Brazil and India – lives with a pendulum that mixes gradual changes in public administration with narrative counterreforms that restore the legitimacy of the region's police models based on the war on drugs and the domestic enemy (Saín 2015). We have not created a public ethic that prohibits violence as an everyday practice and we have not freed ourselves from the antidemocratic idea that civil, political, human, and social rights are only meant for a portion of the population considered "deserving." Citizenship in Brazil continues to be regulated and brokered according to the social and racial position occupied by individuals in society (Santos 1979). Scenes of massacres and police operations that end with dozens of deaths in *favelas* in Rio de Janeiro (Milhorance and Lodoño 2021), the country's postcard, have already become routine in national and international media coverage without any real change occurring. In 2017, the Brazilian state was convicted in the Inter-American Court for Human Rights, part of the Organization of American States (OAS) for two massacres that occurred in the *Nova Brasília* community, inside the *Complexo do Alemão*, in Rio de Janeiro, in 1994 and 1995 (IACHR 2017). In the sentencing, the court declared that there was no impartiality in the investigations and ordered the Brazilian state to establish goals for reducing deadly police force. Many years later, even the Civil Police of Rio de Janeiro are still present in situations that cause death at a rate 2.6 times higher than the average police killings of the civil police of other states (Lima and Bueno 2021), but even so, their actions are supported and justified by many authorities and by public opinion.

Given this structural premise, the social and political history of the country was and is one of violence and inequality, which has left indelible marks on the bodies of those considered dangerous over the centuries: slaves, blacks, the unemployed, the poor, young people, and traffickers. These marks serve as a moral excuse for the division of the population into "good citizens," who have rights, and "outlaws," who must be persecuted and eliminated (Lima 2019). At the same time, the history of the Brazilian state bureaucracy is a history of erasing the memory of this structural violence and maintaining institutional opacity and insulation. The advancements in transparency and accountability have been captured by forces that contribute to a national project that sold itself as peaceful and friendly but is deeply cruel and justifies the violent action of the state (Bueno, Lima, and Costa 2021).

Based on this sociopolitical background, I propose to analyze how the Bolsonaro administration seeks to take advantage of this broader environment of public security disjuncture, to build a symbolic and narrative symbiosis of its political project of power with the very professional identity and conceptions of law and order of Brazilian police officers. This symbiosis tries to reinforce the political conservatism of police officers and, at the same time, it stimulates the radicalized protagonism of these officers in the collective life of the country, in a similar way to what has been happening in Germany, Bolivia, Chile, Colombia, the United States, the Philippines, France, and India. Brazil is another example of how the

police are becoming radicalized and part of the populist calculations of democratic destabilization and violation of human rights across the world. More than traditional coups perpetrated by the armed forces, the destabilization of many democratic societies is being caused by the low accountability and excessive insulation of police forces. And, when a populist, far-right government comes to power and encourages the leading role of the police as enforcers of a hyper-conservative model of order that cannot be questioned, radicalized sectors of the police forces find themselves at ease to test the limits of democratic institutionality.

In order to achieve the analytical objectives proposed here, this text starts with a brief description of the institutional architecture of Brazilian public security and how it is organized in the country's Federative Pact. Brazil has a complex and low accountability public security system, with quandaries that do not only boil down to moral, religious, or sociological aspects. There are numerous governance gaps and overlapping legal attributions and competencies among the Union, states, Federal District, and municipalities without, however, any federative integration or coordination bodies. This text will show how many police forces exist in the country and how they are organized. With a description of the general characteristics of the public security system, the text will present how the police have been occupying the electoral-political debate and reinforcing the scenario outlined here, to, finally, analyze the developments of Jair Bolsonaro's strategy in the area.

The Police and the Federal Pact

Brazil is a federal republic and is organized into three levels of government: the Union, the federal units (the states and the Federal District), and the municipalities. The Union is the autonomous federal entity *vis-à-vis* the states and municipalities of the country and is not to be confused with the exclusive action of the federal government. It comprises the Federal Government, but also Congress, the Federal Public Prosecutor's Office, the Armed Forces, and the Federal Police, among other State bodies. The Union is responsible for exercising the prerogatives of sovereignty of the Brazilian State. As for the federal units, there are 26 states and one Federal District, where the country's capital Brasília is located. Lastly, the country has 5,570 municipalities, with the most diverse population and financial possibilities. According to the Brazilian constitutional model, in general, public policies in the country consider municipalities to be the entities of the federation responsible for implementing end-to-end social policies (health, education, social assistance, urban transport, etc.), while the units of the federation and the Union play the roles of coordination, logistics, and financing of such policies. However, in public security, this generic model does not apply and the three levels of government share (or should share) the attributions of planning, designing, and implementing measures.

In this case, the federal government has under its effective jurisdiction three main police forces (Federal Police, Federal Highway Police, and Federal Prison

Police). The federal states have three police forces each (Civil Police, Military Police, and State Prison Police). There is also a Legislative Police Department, which gathers the police bodies of the Chamber of Deputies and the Federal Senate and operates only on the premises of the National Congress. There is also a Federal Railway Police, responsible for the patrolling of federal railways, but this is practically extinct since there are almost no active police officers (the former ones have retired and there have been no new openings). In all, Brazil has 86 police organizations and 1,188 municipal police guards, which do not have full police power and act in a subsidiary manner in public security (see Table 11.1).

According to the 1988 Constitution (Brasil 1988), police agencies have their missions defined by legal and territorial jurisdictions. Thus, the Federal Police (*Polícia Federal* – PF) – the national judicial police that investigates federal crimes (corruption, terrorist acts, environmental crimes, crimes in indigenous areas, or transnational crimes) and it is the only Brazilian police force responsible for the maintenance of the democratic social order. It also carries out maritime, airport, and border police services. The Federal Police is organized into different careers, the main ones being Federal Police Commissioner (police officer in charge of the investigation), Federal Forensic Officer, and Federal Agent (detective). Because of its strategic legal position, the Federal Police is one of the most prominent police forces in the political and electoral debate, and it is subject to all kinds of pressure. Having control over the command of the corporation and influencing investigations or having access to information about them is perceived by many government leaders as fundamental to their political survival. Jair Bolsonaro, while president, has the prerogative to choose the head of the Federal Police, and has already made, in a span of little less than three years in office, three changes to the command of the Federal Police. In all, the corporation has around 11,615 police officers in 2022.

Also at the Federal level, the Federal Highway Police (PRF) – is the corporation in charge of inspecting the federal road network in Brazil, which has 166 highways and a total length of approximately 47,200 miles. To carry out this task, the PRF has a police force of around 12,000 police officers. It is the only Brazilian police force organized into a single career, without a structural division between the careers of officers, on one hand, and enlisted personnel on the other. The Federal Prison Police still does not have a formally defined structure. The reason behind it is that the Prison Police, federal and state, were created only at the end of 2019 to take care of the custody of prisoners and to provide security in Brazilian prisons. In March 2022, there were 919 penal agents employed. The prison police have, four years after being created, a low level of regulation and governance, inserting themselves into the public security system in a not entirely articulated way.

At the subnational level, following the example of the Federal Police at the federal level, state and Federal District Civil Police have the role of judicial police and are responsible for criminal investigation and prosecution of

TABLE 11.1 Police Organizations in Brazil

Level	Police Force	Duties and Responsbilities	Number of Organizations	Personnel
Federal	Federal Police	Article144 of the Federal Constitution: I – Investigate criminal offenses against the political and social order or the federal government's property, services, and interests or those of its agencies and state companies, as well as other offenses which have interstate or international implications and demand standardized sanctions, as determined by law; II – to prevent and repress illicit traffic in narcotics and related drugs, smuggling, and embezzlement, without prejudice to the action of the treasury and other public agencies in their respective areas of competence; III – to undertake sea, air, and border police duties; IV – to undertake, exclusively, the Union's judicial police duties	1	11.615
	Federal Highway Police	Overt patrolling of federal highways	1	12.324
	Federal Prison Police	Security at federal correctional facilities	1	919
	Federal Railway Police	Overt patrolling of federal railways	1	189
	Legislative Police Department	Conservation of order and property, as well as prevention and investigation of criminal offenses, within the buildings and external premises of the National Congress	1	459
States and Federal District	Military Police	Overt policing and maintenance of public order	27	406.384
	Civil Police	Judiciary police and investigation of criminal offenses, except military ones	27	91.926
	State Prison Police	Security at state and federal district correctional facilities	27	92.216
Total Police Forces			86	616.032

common crimes (homicides, robberies, gambling, etc.). The headcount for Civil Police in all 27 federal states is approximately 92,000 people. The career structure is similar to that of the Federal Police and, by command of the Federal Constitution, they can only be headed by Civil Police Commissioners, a career reserved exclusively for law graduates. The Civil Police are in charge of investigating crimes and forwarding those accused of committing them to the Public Prosecutor's Office, which will decide whether to file charges. The Civil Police are responsible for investigating crimes and missing persons, as well as serving arrest warrants, for example. They do not have an outwardly visible character and do not wear uniforms. The civil police in Brazil also provide services to the population in police precincts.

There are also about 55,000 military firefighters who have attributions in public security and social defense. They are autonomous bodies, except for the state of São Paulo, where the Fire Brigade is a branch of the São Paulo Military Police. They follow the same legislation and career structure as the military police. Both corporations are state-level military organizations. The ~~Military Police~~ are responsible for patrolling the streets, traffic, and maintaining public order. They are in charge of civil disturbance control and have large specialized units (cavalry, shock, tactical groups, aviation, anti-bombing, etc.). They had, in 2022, added together, about 461,456 active police officers. ~~Military Police and Military Firefighters~~ are organized into two careers: officers and lower-ranked personnel. The officers are in charge of commanding and managing the ~~Military Police.~~ The lower rank personnel are responsible for day-to-day policing activities. Each of these careers has a number of posts and ranks. The Military Police are the police forces with the largest number of troops in the country, and they have the most complex governance framework. There are disputes over to whom they are subordinated, which, ultimately, reinforce operational autonomy and organizational insulation and make these corporations rather opaque and resistant to change to a much greater degree than with other Brazilian police forces. The Constitution itself causes such disarray.

According to the Constitution, it is the Union's responsibility to issue "general rules on the organization, personnel, ordnance, guarantees, drafting, mobilization, retirement and pensions of the military police and the military fire brigade" (Brazilian Constitution, art. 21). Yet in another passage, in Article 144, the Constitution states that the ~~Military Police~~ are managerially subordinated to the Governors of the States and Federal District, who are responsible for issuing regulations on the management and administration of such forces. To make the picture even hazier and more complex, in the same Article 144, the Brazilian Constitution states that the ~~Military Police~~ are considered Auxiliary and Reserve Forces of the Brazilian Army, which, under law 667/1969, from the period of the military dictatorship, has the prerogative to coordinate them concerning instruction, supervision, ordnance, and control. This makes the overall situation is really confusing (see Table 11.2).

TABLE 11.2 Institutions with Complementary Duties to the Police Forces in Public Security

Level	Other Public Security Organizations	Duties and Responsibilities	Number of Organizations	Personnel
Other Federal Organizations	Army (1)	Support in Operations of Law and Order Guarantees. Decree n°88.777/1983. The Army Staff, through the General Inspector of the Military Police, is responsible for (1) the establishment of principles, guidelines, and norms for the effective control and coordination of the Military Police by the Armies, Area Military Commands, Military Regions and other Major Commands; (2) the centralization of the matters under the jurisdiction of the Ministry of the Army, in order to establish a suitable policy and to adopt appropriate measures; (3) the guidance, supervision, and control of the instruction and teaching of the Military Polices; (4) the control of the organization, of the personnel and of all material mentioned in the sole paragraph of Article 3 of this Regulation; (5) the collaboration in studies concerning the rights, duties, remuneration, justice, and guarantees of Military Police and the establishment of general conditions for drafting and mobilization; (6) the examination of mobilization charts for the Military Police; (7) provide guidance to the Military Police, cooperating in the establishment and updating of basic legislation relating to these corporations, as well as coordinating and controlling the enforcement of applicable federal and state legislation. Art 38 – Any organizational change, increase or decrease in the number of personnel of the Military Police forces shall be subject to the approval of the Army General Staff, who shall judge its suitability given the implications of such change in the framework of Internal and Territorial Defence.	1	222.148

	Description		
Navy (1) Air Force (1)	Support in Law and Order Operations, involving the preservation of public order and the safety of people and property when the capacities of the police forces have been exhausted	1	71.646 66.806
Federal Prosecutor's Office (1)	Safeguarding the legal order, the democratic system and the inalienable social and individual interests: I – privately promote public criminal action, in the form of the law; II – zeal for the effective compliance of the public powers and services of public relevance with the rights assured in this Constitution, promoting the necessary measures to guarantee them; III – promote civil enquiry and public civil action, for the protection of the public and social heritage, the environment and other diverse and collective interests; VI – to issue notices in the administrative procedures under this competence, requesting information and documents to instruct them, as per the respective supplementary law; VII – to exercise external control over police activity, as per the supplementary law mentioned in the previous article; VIII – to request investigative procedures and the opening of police enquiries, indicating the legal grounds for these procedural manifestations.	1	2.366
Federative Consortium between the States and the Federal Government National Public Security Force (1)	Consortium coordinated by the Ministry of Justice and Security and with police officers assigned by the states and the Federal District to provide support in operations and police reinforcement in emergencies. Under the law, it is not an official agency or a National Guard	1	2.169
States and Federal District Military Firemen (2)	Civil Defence	27	55072
Prosecutor's Office (1)	The same attributions of the federal level in matters of competence of the Federal Units	27	14.224
Municipalities Municipal Guards (1)	Protection of municipalities' assets, services, and facilities	1,188	99.510

(1) Data of the year 2020. (2) Data of the year 2022.

In other words, the country's federal pact, embodied in the Federal Constitution, neglected the governance of the country's police forces and left us within dissonance between different levels and instances of police coordination that encourages fragmentation, autonomy, and isolation. Thus, on a day-to-day basis, police institutions do what they think is right without anyone actually controlling them in terms of attributions and operational standards. It will be the police forces themselves, for example, who will define the syllabus of their training courses, without dismissing the value given to the idea of war in constructing the police ethos.

Neither governors nor the Army monitors the existence of operational protocols such as those regulating the use of force and/or the policing of public protests, for example. This role falls formally to the Public Prosecutor's Office, a state organ also divided between the federal and state levels and which has the legal attribution of external control of police activity. On a federal level, which has within its jurisdiction the monitoring of compliance with international human rights treaties and the observance of the collective rights of the population, the Federal Public Prosecutor's Office struggles to exercise the role of external control of the police, since many state public prosecutors understand that this is an exclusive competence of their own and that it is not up to the federal level to act on the matter. However, the State Public Prosecutor's Offices focus their attention on the individual conduct of the police and do not demand the existence of metrics, manuals, and procedures that can serve as a benchmark for the evaluation of police institutions. Nobody supervises or monitors the daily institutional routine. And, as they are not scrutinized by any other public body and as civil society finds it difficult to access data and information, a shadow zone is created, reinforcing a very high level of police autonomy over the definition of their own mandates, attributions, and interpretations of law and order.

This scenario is also due to the fact that, in the face of the competing existence of a triple command level (federal and state executives, and the Army) and the reduced degree of institutional control by the Public Prosecutor's Office, many of the *corporativist*[1] demands and perceptions of Brazilian police personnel were being diluted into a sort of zero-sum game in which police officers started to contend for political spaces and electoral positions so that they could influence the direction of Brazilian public security policy and unblock their agenda of reforms in the area. However, this action is undermined to the extent that if there is consensus among police officers as to the urgency of reform and professional valorization measures, there are also major differences as to what is the best format for organizing the police. The interests and actions of the representatives of the different careers that compose the police forces are often contradictory (the interests of Civil Police officers against those of the Military Police officials, for instance). In this process, Brazil has a system of vetoes, similar to what happens in the United Nations Security Council, where everyone agrees on the need for reforms, but there is no consensus on what should be put in place and, therefore, each stakeholder vetoes the other's proposal, and nothing advances.

In this confusing scenario, the federal units ended up taking on a more man-agerial role in terms of human resources and civil and military police salaries. At best, in response to the escalating crime rates that marked the 1990s, 2000s, and 2010s, the feasible option for the area managers was to align themselves more and more with the principles that became known as "citizen security" (Freire 2009) and with successful international practices recommended by agencies such as the Inter-American Development Bank (IDB) and the United Nations Development Programme (UNDP). As opposed to the tradition of international cooperation that revolves around proposals for SSR (Security Sector Reform), Brazil – and Latin America as a whole – invested in the construction of alternative narratives to the authoritarian past and paid little attention to structuring effective demo-cratic institutional competencies. Much was invested in the incremental aspects of an authoritarian model believing that its democratic conversion would be possible without any trauma or ruptures. There was no rupture with the path dependency that regulates the area. In this sense, state actions have concentrated energies on the tripod of structuring systems of criminal analysis and problem-oriented target-setting, similar to the CompStat model in the United States, which makes inten-sive use of information, improvement of intelligence and criminal investigation, and brings them closer to the population. At first, many of these programs proved to be successful (the Pacificatory Police Units or UPPs – named *Unidades de Polícia Pacificadora*, in Rio de Janeiro – the Pact for Life (*Pacto pela Vida*) in Pernambuco; and crime reduction in São Paulo, among others). However, over time and as the administration at the state government level changed, they lost dynamism and focus. The reason for this movement is that structural and legal reforms were not made. The proposed innovations induced marginal gains and became dependent on who, individually, occupies the position of power and governance at any given moment. With the slightest sign of change in the political environment, the police reverted to the governance model devised between 1967 and 1969, years of heavy political repression under the military dictatorship (Lima 2018; 2019; Ruediger and Lima 2021).

The Brazilian Army, for its part, has resigned itself to the role of controlling and authorizing the acquisition of military equipment by the police. According to existing legislation, weapons, vehicles, ballistic vests, and/or any equipment that has military use is restricted to the armed forces and/or strongly regulated by them. In the national defense doctrine that still today influences the Armed Forces, no police force can have military superiority over the Armed Forces, since, being subordinated to the governors, this could jeopardize the territorial integrity of the nation. The National Congress hardly occupied itself with the organization of public security and dedicated itself more to legislative projects in the penal sphere, such as those that create or modify crimes. This was done based on a pendulum between different and ambivalent positions on criminal policy.

There is no concern with the coherence of the country's criminal legal and penal procedural framework. Azevedo and Campos (2020) identified, based

on the 130 laws approved between 1989 and 2016, that 27.7% of these laws tightened punishments or restricted rights concerning previous laws; 26.2% expanded defendants' and prisoners' rights, and 20.8% created new types of crime. Legislative production is one of the main victims of the veto system described above and only moves forward when an issue is prioritized by the President's Office, which mobilizes a political support basis in support of the legislation. But in the legislative pendulum, a balancing axis is that the Constitution says that a Complementary Law should be drafted to ensure the efficiency of the system, something that did not occur until 2021. However, the Federal Government gave up taking a more active leadership on Brazilian public security and only addressed the issue in a secondary manner and/or focused on the federal police forces.

The Federal Government's priority capable of changing the correlation of forces in Congress was left to the mercy of crises and spectacular crimes that dominate the mainstream and social media. Before Jair Bolsonaro, all former presidents of the Republic since 1989 have avoided direct involvement in the area and left the state police forces isolated and/or only gave financial support to the federation units. Many presidents believed that public security was a governor's agenda and that it was not politically appropriate to get involved with it. Thus, none of the seven national Programs or Plans[2] created by the Ministry of Justice and Public Security teams between 1990 and 2018 had the unconditional support of the Presidency of the Republic. Not surprisingly, almost all, except for Pronasci (the National Programme for Public Security with Citizenship, or *Programa Nacional de Seguranca Publica com Cidadania*) in 2006, were formulated to increase the effectiveness and efficiency of what already existed. There was no priority and political investment in institutional reform and remodeling. The only plan that shifted, even if not totally, the focus from management aspects to the need for structuring mechanisms of democratic governance of the police was the SUSP (Unified System of Public Security or *Sistema Único de Segurança Pública*), conceived in 2004 but only approved in 2018. But even the SUSP lacked the necessary support from then-President Michel Temer (Spaniol, Moraes, and Rodrigues 2020; Figueiredo, Barros, and Lima 2021).

Bolsonaro, unlike other presidents, has assumed responsibility for the issue. While previous presidents kept their distance, Bolsonaro took on public security policy to emulate the expectations of police officers that until then had been frustrated by the convoluted governance model described earlier in this text. His authoritarian rhetoric of eliminating "enemies" and using violence for some sort of moral and social cleansing of the country had a wide acceptance in the police ranks and, from then on, Bolsonaro began to define the framing of the public debate on security, even taking advantage of a moment of a decrease in the number of homicides in the country that began in 2018, before his inauguration. Amid the nationwide drop in violence, the president's speech, saying "I will solve it," managed to build a political narrative where he places himself and the

police, especially the military, as protagonists in an area where all other presidents placed themselves in a supporting role. Moreover, Bolsonaro managed to politically attach the high levels of criminal violence and all the dilemmas of the current governance model to democracy and the guarantee of human rights, even though almost all the norms and laws that govern the police predate the Federal Constitution and the dictatorial period.[3]

Since taking office, the president has issued around 30 decrees facilitating access to firearms. Many of his supporters attribute, without evidence, the reduction in crime to this measure and Bolsonaro's term in office. Bolsonaro's empowerment is, therefore, a combined effect of the failure to reform police forces in Brazil, of the idea that "a good criminal is a dead criminal," accepted by 57% of the Brazilian population (FBSP 2016) and has become a political banner not only of the extreme right but of many police officers who choose to be candidates for elective positions in the country, as well as Bolsonaro's ability to determine the political agenda of the area regardless of the actual trends in crime. His populist discourse updates traces of the national authoritarian and violent culture in the face of resentments and hatreds of a deeply unequal and fragmented society that emerge and/or are enhanced by the phenomenon of social media. Bolsonaro treats public security as a moral issue and, as such, focuses on the behavior of individuals and society, exempting the state and its police institutions from responsibility for the democratic effectiveness of the area. This is a historical characteristic of the relationship between state and society in Brazil, but which, when claimed by Jair Bolsonaro, is bolstered and sounds like redemption and relegitimation of the violent and disjunctive patterns of police activity.

Police Officers in Electoral Politics[4]

To understand the protagonism of police officers in Brazil's political and institutional scene, it is important that we also analyze the electoral rules that authorize them to participate in elections and their impacts on the organization of these professionals as political actors. Unlike members of the Public Ministry or the Judiciary, who need to give up their careers if they wish to run for office, Brazilian legislation allows police officers to run for elections without the need to leave their police careers and/or be subject to transitional rules. The 1988 Constitution allows ~~Armed Forces~~ or ~~Military Police~~ officers with more than ten years of service to run for office without having to resign from their military ranks. They only have to resign if they are elected, automatically retired. Military personnel with up to ten years of service, whether federal or state, must leave their posts permanently before running for office. However, in other countries, the participation of members of the security forces in elections is restricted or even prohibited. Chile, the United States, France, England, and Portugal have rules to prevent or regulate the candidacies of military and police officers. Only Germany and Canada are similar to Brazil and allow police officers to run for elected positions. In the United States, for example, no police force that is subsidized by federal funds

can allow its members to run for office without first dismissing them from their posts (Rossi 2020).

According to data from the Brazilian Public Security Yearbook (FBSP 2020), updated by Lima (2021), over the six elections held in the country in the period 2010–2020, at least 25,452 police officers and members of the Armed Forces ran for elected positions in Brazil (1.6% of the total number of candidates in Brazil in the same period). Of these, 2,719 were elected between 2010 and 2020. Considering that in 2020 Brazil had around 5.6 million active and inactive police officers and members of the Armed Forces, it is possible to assume that the police candidates have their main electoral base in a large number of members of their careers. By 2010, military personnel and police officers accounted for 2.9% of the Brazilian electorate. In 2018, the most recent year this information is available, the percentage increased by 30.9%, reaching 3.8% of the electorate. This figure alone draws a lot of attention and explains the importance of security forces in the country's electoral process and how key they are to Jair Bolsonaro's strategy. Now, if we multiply this total by the average number of members of Brazilian families, which was 3.3 in 2008, we will have something like 18.5 million people linked to the "police and military family" – people who already vote or who help to irradiate perceptions and social representations widespread in these categories about the course and direction of politics. If one chooses a more conservative number and we consider that, of the 3.3 people that on average comprise each family in the country, at least the police officer/member of the Armed Forces and his/her spouse are voters,[5] the country has at least 7.6% of its voters directly linked to the security forces. Investing in winning over the police base is therefore more than an ideological question. It is an electoral calculation that no candidate for president of the republic before Jair Bolsonaro had made.

Bolsonaro's electoral calculation strengthens and relies on the disappointment of this base composed of police officers and their families regarding the treatment given to the area by previous governments and the feeling of abandonment stemming from this. Until 2010, given the positive macroeconomic scenario, there was an array of incremental federal measures that, to a greater or lesser extent, met the corporative and sectoral demands of the police. Among them, in 2001, the National Public Security Fund was created and later expanded to encompass investments in municipalities. In 2004, the bases of the SUSP were introduced, although only officially approved in 2018. The Pronasci (*Programa Nacional de Segurança Pública com Cidadania*, or Public Security with Citizenship Program) was created in 2008, offering scholarships to police officers who were enrolled in courses offered by the National Public Security Secretariat (SENASP, or *Secretaria Nacional de Segurança Pública*, part of the Ministry of Justice). In 2009, the First National Public Security Conference was held and increased the expectations of the professionals in the field that effective changes would take place. However, Dilma Rousseff took office in 2010 and abandoned many of the actions initiated. The economic crisis that branded her administration put a strain on the notion

of integration and, in a decision that I consider mistaken, based on a narrow view that public security is a state matter, the Rousseff administration dismantled the federal structures created between 2001 and 2009 and focused its efforts almost exclusively on security investments in the organization of the major events to be hosted in the country that marked the past decade (the summer Olympic Games, the World Youth March, and the FIFA World Cup finals, among others).

As a side effect of this decision and as a political option to address the crises in the country's public security, which were pressing for answers, the federal government ended up pulling the armed forces back into public security through numerous GLO operations (Guarantee of Law and Order), which is when, at the behest of the president of the republic and with the consent of the governor of the relevant state, federal military troops (Army, Navy, and Air Force) replace the police forces in public security. This ended up generating a cycle of remilitarization of public security that was later exploited by the opposition to the Workers' Party (Lula's party) and played a central role in strengthening the insulation of police institutions and dissipating the efforts made in the 2000s to integrate and coordinate public actions and policies. It is a fact that, alone, the option made by the Dilma Rousseff administration does not explain and/or was not responsible for the public security situation, quite the opposite. We are facing an area that is deeply permeated by multiple interests and dilemmas. However, if there were political counterpoints that indicated priority for the police forces previously, now that is no longer true and public security has become an increasingly hostile territory for external proposals for reform, especially those coming from the left and center-left of the ideological spectrum.

Not surprisingly, in electoral terms, in 2020 the proportion of police officers elected was 10.2% in relation to the total number of police candidates, but it was lower than the peak of 11.8% obtained in 2016, the year characterized by the impeachment of President Rousseff, a deep economic crisis, and the zenith of the anti-corruption investigation Operation Car Wash, all of which put the Workers' Party on the defensive and helped to make Jair Bolsonaro's election as president of the republic possible. What the data on elections indicate is that police officers are more likely to be elected in contexts of crisis and shifting expectations, not only in the economic environment but also in political priorities and ideologies. The growth of the phenomenon of police officers in politics in the case of public security needs to be nuanced by the multiple movements in the field, but it also needs to be interpreted through the construction of a narrative that has managed to summarize politics as a war against evil, in which the police are seen as warriors who will restore order, morality, and proper behavior. Furthermore, warriors who have been wronged and devalued by "left-wing governments."

Speaking of order, Brazilian police candidates would be addressing one of the main dilemmas of police activity in democratic contexts around the world. Jerome Skolnick, in his book *Justice Without Trial: Law Enforcement in Democratic Society*, originally published 55 years ago, in 1966, builds upon the experience with the

US police to say that two sometimes antagonistic forces interact in defining the democratic legitimacy of police action. The idea of order defended by bureaucratic ideology, that emphasizes the importance of operational efficiency and the police officers' capacity for initiative and autonomy, which feeds back into the social demands for greater control of crime rates. Moreover, as an operational assumption, the requirement of compliance with unrestricted respect for the rule of law and for the individual rights of all citizens sets boundaries and constraints to everyday police activity.

Due to this tension, legal limits on the use of force and on how to choose crimes and criminals to be investigated are often seen by segments of the police and the population as incentives to disorder and violence and trigger backlash. The border between legal limits and operational autonomy becomes the ground for ideological and party-political disputes; it becomes the ground for knowledge disputes and for claims for the expertise and prerogative of defining conceptual limits in public security. This reinforces a picture that further emphasizes the antagonism between, specifically, the guarantee of human rights and crime control. The political focus of the candidates linked to public security shifts to the defense of the idea of weakening the legal restraints imposed on police officers and the freedom to determine the legitimacy of the narrative and actions that structure the social representations about the courses and directions of public security policies and conflict management in a society – as exemplified by Jair Bolsonaro's defense of the expansion of the "exclusion of unlawfulness" (*excludente de ilicitude*) in cases of policing killings, which took over the political news in 2019, regardless of investigation into the legitimacy of such deaths and the control of legality made by the Prosecutor's Office and the Judiciary. The police forces are increasingly seeking to gain autonomy from civilian controls that, in effect, have controlled them only exceptionally in recent decades, in an institutional architecture that strengthens the position of the President of the Republic. This is even more sensitive at times when populist and authoritarian leaders, such as Jair Bolsonaro, occupy that position (Veleda 2021).

Faced with this dilemma, historically this antagonism and/or dichotomy between maintaining order and controlling crime, on the one hand, and guaranteeing civil and human rights, on the other, has been translated in various ways among different democratic nations. However, one of the underlying features of this process is common to all of them: members of police organizations tend, in the majority, to identify themselves with more conservative positions in society and view social change and the extension of rights with more suspicion and opposition. A survey carried out with the police in the United Kingdom by Robert Reiner in the 1970s indicated that 80% of the UK police officers at that time described themselves as conservative. From this observation comes another, that is, the Brazilian reality is very similar to the England of 50 years ago (Reiner 1985). According to Lima (2020), who grouped the party affiliations[6]
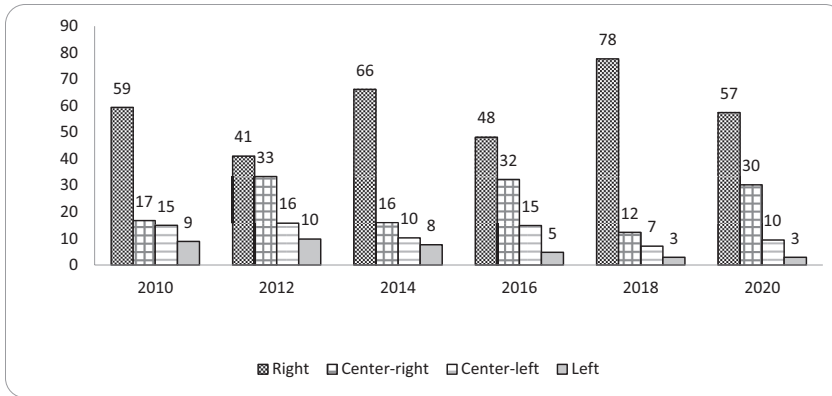
FIGURE 11.1 Proportion of Public Security Professionals by Political and Ideological Spectrum in Brazil (2010–2020)

in which police officers ran in the elections that took place between 2010 and 2018 into categories: left,[7] center-left, center–right, and right, we will see that, on average, 81.8% of professionals of the security forces in Brazil who ran during the elections in the analyzed period did so as members of right–wing and center–right parties, traditionally more linked to the conservative banners of society. Analyzing Figure 11.1, it will be found that the peak of the association of police candidates with parties on the right of the political spectrum was in 2018, when 89.9% of these professionals ran for public office while members of such parties.

In the opposite direction, it is also worth noting that, in 2018, parties on the left won fewer police candidates to their ranks, when only 10.1% of police candidates ran affiliated to one of these parties and Jair Bolsonaro was elected with a far–right discourse structured on the promise of order, the criminalization of the left and social movements, and conservatism regarding morals. But if the propensity of police candidates to adhere to right–wing and center–right parties is an undeni–able fact by the data analyzed, this does not mean that the subnational effort is homogeneous and/or is not influenced by local dynamics and specific operational patterns of each police corporation. In 2020, what draws attention is that, instead of reapproaching the police universe and carrying out grassroots work and polit–ical training that could rival the center–right and right–wing narrative, left–wing parties sought to launch some mayoral and deputy-mayoral police candidates who enjoyed social prestige in their cities, such as Rio de Janeiro and Bahia, to coun–teract the conservative rhetoric without, however, building an alternative argu–ment about order and security. In this partisan logic, the scenario of institutional political distancing of public security from the leftist agendas seems not to have been recognized. At the same time, the emphasis is on models that merely out–line the structural problems, and do not advance proposals capable of offering alternatives that cause resonance among public security professionals.

Ultimately, whether for one side or the other, the "police party" broadens its own spaces and gradually imposes itself as hegemonic. Therefore, it is possible to think that the maintenance of the framework of legal dissonances and the failure to meet legitimate demands for better living, working and salary conditions for police officers have weakened the few and modest projects of change in the institutional architecture of public security attempted after 1988. The police officers found themselves in the position of defending, on their own, projects for professional valuation and they do this based on worldviews that, rather than overcoming the corporativist disputes waged so far, paralyze more substantial reforms and are based on conceptions of order that feed back into the "anti-systemic" discourse of *Bolsonarismo*, including its most radical portion – which cannot be tolerated in a democracy.

As part of the movement to please the more than 18 million people who comprise the aforementioned "military and police families," a key characteristic of the electoral debate was that the criticisms of police candidates and those who managed to be elected are usually focused on the governors' management of public security, since it is up to them to manage the positions, salaries, and physical and mental health programs of the firemen, civil, criminal, and state military police officers who make up the vast majority of the country's police force. Bolsonaro noticed this trait of political action and partnered with leaders of associations and unions with electoral interests to create counterpoints to the governors. Several leaders with ties to the president, such as those responsible for the military police riot in the state of Ceará in February 2020, which opposed Governor Camilo Santana (Workers' Party), and undermined salary negotiations that already had the approval of most police officers and created a crisis that resulted in an explosion of homicides in the state, after two years of a steep decline.

Paradoxically, by acquiring space and adhering to the ~~bolsonarista~~ agenda, this same "police party" seems to be going through a delicate moment of weakening of its traditional leaderships connected to unions and associations, which maintained the corporativist demands in the political debate and promoted names for elected offices. On one hand, the reach of these leaderships is limited, since only about one-third of Brazilian police officers are affiliated to some kind of union or association and the organizational capability and involvement in party–political life is not homogeneous across the various regions of the country and subject to multiple interfering variables (such as local elites' political forces, among others). On the other hand, the weakening of traditional leaderships happens alongside the strengthening of leaders more directly associated with the character of Jair Bolsonaro and whose focus is on maintaining the political and ideological project of power of the current president's group.

In other words, the capacity of police associations to lead the agenda of reforms on the working conditions of public security professionals was replaced by the almost uncontested adoption of Jair Bolsonaro as the hegemonic spokesperson of the average feelings and expectations of these professionals. The room for technical

resistance and internal dissonance that was already reduced became even narrower. The associations that supported Bolsonaro but wanted to remain faithful to their corporativist objectives have been sidelined.

Bolsonarismo within the Police Forces[8]

Having made a genealogy of the sources of the disjuncture in Brazilian public security and the growing protagonism of the "police party" in Brazil's electoral political life, it is possible to defend the hypothesis that *Bolsonarismo*, as a political ideology, has much deeper historical roots than the direct actions of President Jair Bolsonaro during his first years in office. This implies that *Bolsonarismo* updates conservative and authoritarian narratives that have been shaping institutions, organizational cultures, and social representations of how the state should deal with crime, fear, and violence for centuries. *Bolsonarismo* is not a single thought, but today it is the hegemonic way in which police officers understand what it means to be a police officer and to do policing in contemporary Brazil. According to this hypothesis, the frustrated attempts of incremental changes in the area and the vetoes to the structural reforms in the post–1988 period, the year of the new Brazilian Constitution, are two faces of the same civilizational dilemma and characterize what I called in previous texts (Lima 2018; 2019) a simulacrum of democracy.

This means that the country coexists with a complex framework of moral, political, and institutional equivalences that veil violence and structural inequalities and, therefore, normalize authoritarian patterns of conflict resolution. Hence, when Jair Bolsonaro appeared on the horizon during the perfect storm that was formed in Brazilian politics between 2013 and 2018, he acted as a catalyst for authoritarian positions that were much more entrenched than mere momentary electoral preference and/or a desire to fight corruption, which practically swept left-wing parties off of the Brazilian electoral map in that year. Bolsonaro materialized, along with Donald Trump and several other far-right leaders in the world, as the perfect translation of today's social time. And for this, he has co-opted police officers into his ranks and is not shy about discrediting democratic institutions and testing them to the breaking point.

This co-optation does not occur only in a passive way, by aligning expectations and worldviews. Bolsonaro's political group has actively invested in the dissemination of its values and the ideological and political formation of police officers. During his first two years in office, President Jair Bolsonaro has attended 24 military or police graduations. His participation continued in 2021 and, in May, during one of the graduations, the General Commander of the Federal District's Military Police closed the official ceremony with the president's campaign slogan (Gullino 2020). Olavo de Carvalho, a self-taught thinker who claims to be a philosopher and who was one of the major ideological references of the Brazilian far-right, offered his online philosophy course for free to Brazilian police officers from mid-2019

until his death in January 2022. The city councilor in Rio de Janeiro, Carlos Bolsonaro, one of the president's sons and responsible for Bolsonaro's social media communication, acknowledged on his Twitter profile that offering free courses is an "excellent strategy for the Public Security Forces to be willing to learn more about the evil leftist culture that surrounds us[...]" (UOL 2019). Likewise, the federal deputy Eduardo Bolsonaro, another of Jair Bolsonaro's sons, admitted in a live broadcast of the Terça Livre Channel, managed by the blogger Allan dos Santos on YouTube, that the strategy of his group is to support police officers in the creation of newspapers that feature content aligned with the president's project in all 5,570 municipalities across the country (Terça Livre 2022).

All this occurs amid the acclaim and support of significant portions of the population. A research project on fear of violence and the propensity toward authoritarian values conducted in 2017 and based on a national survey that applied the famous F Scale, by Theodor Adorno, estimated that the average score of support for authoritarian positions in the country was 8.1 on a scale of 1 to 10. Of the assertions that stood out the most in this study, the one that proved most significant was the dimension originally named by Adorno as submission to authority (Lima 2020). As such, it is understood that Bolsonaro has perfectly shaped himself to fit the profile of the collective social imaginary that sees the national need to find a "savior," who will "straighten up the house" and restore the "lost authority," according to ultra-right-wing discourses, to the civil, political, and social rights agenda of the Brazilian Constitution (Lima et al. 2020). The civil rights agenda was and is still being marketed, therefore, as the one responsible for the "moral" and "civic" decadence of the nation, even though we have seen that it is still an inconclusive project in terms of public security. Collective and human rights are associated with criminals and individual duties and freedoms are emphasized, following the example of the unrestricted defense of the expansion of the right to possess and carry firearms and the repeal of any policy of control and traceability of firearms.

The moral and traditional values themes are reinforced to the extent that the guarantee of the social democratic order inaugurated by the Federal Constitution is made by the National Congress and the Federal Supreme Court. However, in Bolsonarista rhetoric it is necessary to dismantle the legitimacy of such powers of the republic. Criticism begins to emerge and attacks against members of these powers have become part of the political game. The problem escalates exponentially when this political and ideological project manages to mobilize significant portions of the Brazilian police officers to the point that they publish antidemocratic manifestos accepting the closing of the Republic's institutions and urging President Jair Bolsonaro to intervene in order to disrupt Brazil's democratic constitutional order. This is what another Brazilian Forum for Public Security study reveals, demonstrating that the allegiance to the antidemocratic and radicalized *Bolsonarista* discourse represents at least 12% of military police officers, 7% of civil police officers, and 2% of federal police officers who have
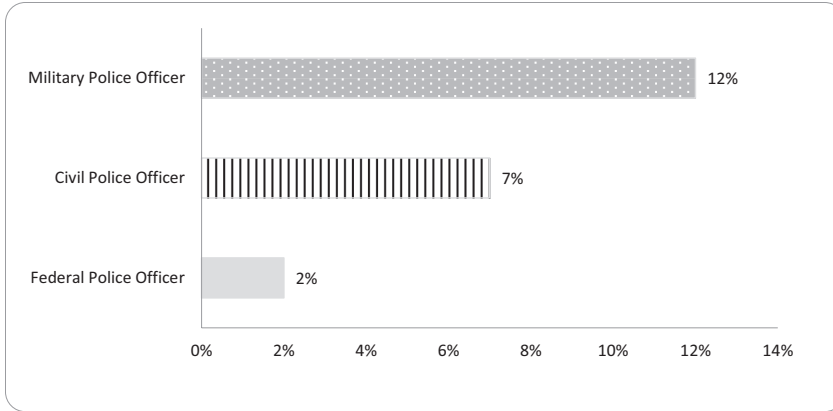
FIGURE 11.2 Percentage of Police Officers Posting Criticisms of Democratic Institutions in Relation to the Total Number of Posts Made by the Profession

accounts on social media and interact publicly on Facebook groups and pages (FBSP 2020). If we extend the study sample, such percentages represent a group of approximately 120,000 police officers who have been converted to pro-coup and authoritarian discourses, and who would accept institutional ruptures without any major ethical or moral constraints (Lima and Bueno 2020). It is worth noting that such percentages do not only include Jair Bolsonaro supporters but also reveal the worldviews that guide the social representations of police officers about social and public order. This is because, on social media, only 68% of the police officers who criticized the Congress and the Federal Supreme Court presented direct interactions in environments linked to radical *Bolsonarismo*. In other words, the strength of Bolsonaro's hyper-conservative discourse within the police forces is much greater than the engagement of police officers with a specific political pro-ject (See Figure 11.2).

Corroborating the numbers collected on social networks, the Atlas opinion research institute (2021) applied a survey specifically among the police profession and found that 21% of Brazilian police officers (about 140,000 police officers) are in favor of the establishment of a military dictatorship in Brazil (See Figure 11.3). But it does not take a radical rupture to subvert the democratic order and put the capacity of the rule of law to deal with its security forces at risk. At the street level, the contamination of the troops is already quite visible, in the numerous cases of military police officers accused of acting in a politically partisan manner against opponents of the government. A study carried out by *O Estado de São Paulo* (Godoy 2021), the country's third largest newspaper, identified 14 cases in which mili-tary police officers acted to repress or arrest Jair Bolsonaro's opponents between January 2020 and May 2021. Before these episodes, a first case occurred early in the current president's administration, when the Minas Gerais State Military
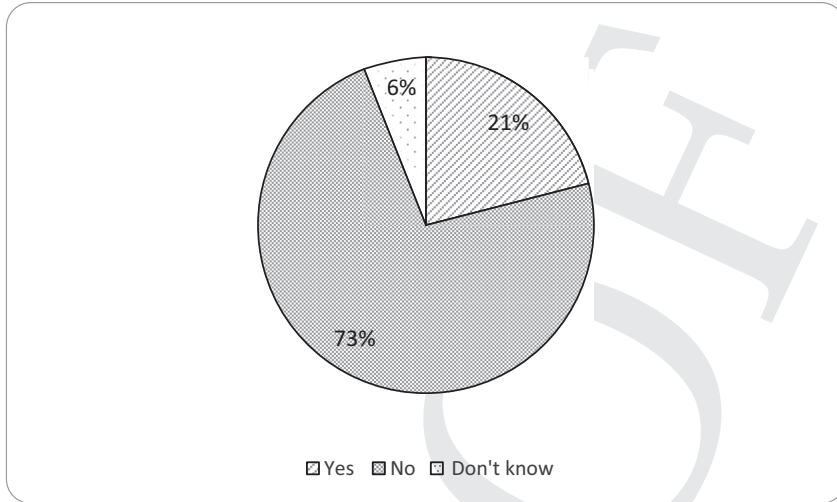
FIGURE 11.3 Police Officer, Are You against or in Favor of the Installation of a Military Dictatorship in Brazil?

Police banned a traditional Carnival group from the city of Belo Horizonte from parading while criticizing Bolsonaro. The Federal Police claims to have opened 77 enquiries based on the old National Security Law, created during the dictatorship, in 2019 and 2020. The number reached in these two years exceeds the number registered in the previous four years, when the corporation says it had opened 44 enquiries (Balthazar 2021). Many of these cases are allegations that the president's image is being sullied by criticism of his handling, for example, of the COVID-19 pandemic.

Moreover, in terms of support for the *Bolsonarista* agenda, the behavior of Brazilian police officers repeats the electoral movement and cannot be seen as the translation of a monolithic group. The research of the Brazilian Forum for Public Security shows that, among military police personnel, the interaction of rank-and-file officers in environments that support Bolsonaro's radical agendas is 25%, while among high-ranking officers, who comprise the career responsible for the direction of the Military Police agencies, it is 17% (FBSP 2020). The formal responsibility for commanding the police and the need to maintain control over the troops seems to influence the position of high-ranking officers so that political adherence does not induce riots and uprisings within the corporations themselves. In any case, two surveys with different methodologies (interviews and social media tracking) conducted by different institutions estimated that between 120,000 and 140,000 police officers endorsed the most radical *Bolsonarista* discourse, advocating antidemocratic measures and the shutting down of institutions.

In comparative terms, these figures represent around 20% of the Brazilian police forces and are approximately one-third higher than those captured by Robert Reiner in the 1970s, who estimated that around 15% of the British police force described themselves as aligned with the extreme right. Bolsonaro has reinforced, it seems, a trend of conservatism among Brazilian police officers that, coupled with the scenario of political and organizational disjuncture in the country's public security, raises important warnings about the capacity to contain and/or mitigate the risks of an institutional collapse. The question, therefore, is not only of ideological convergence of police officers, as the attack on Capitol Hill, in the United States, made clear with the involvement of police officers as radicalized supporters of Donald Trump. Nor is it just a question of legal instrumentalization as in the Philippines, where Rodrigo Duterte used the police to provide legal legitimacy to his policy of social cleansing disguised as combating drug trafficking. Bolsonaro strengthens himself with the amalgam of political, ideological, legal and institutional conditions that shape the model of violent and unequal social and public order accepted and "naturalized" by most Brazilian police officers. And in doing so, he encourages police officers not to accept any questioning of their political project and to repress any demonstrations and social movements of opposition. Opposition becomes synonymous with unpatriotic, "evil" and disorder.

With the weakening of traditional police leaderships, which until the beginning of Jair Bolsonaro's administration were able to be representatives of the wishes of their professional categories, the police officers adopted the cult of personality and the image of the "the myth," carefully constructed by those responsible for the communication of the current leader of Brazil. As I see it, this is the main risk of police radicalization, that of confusing a populist leader with the very notion of state, homeland, and nation. Police forces are institutions of the state. They are the state's armed branch in times of peace, and if not regulated, they can turn against even those of their members who do not agree with hegemonic thinking. Under the current framework, in addition to operational and technological issues associated with a conflict, a new crisis can be born where least expected, since the *Bolsonarista* stormtroopers are distributed throughout the country and are not limited to a single corporation (however, the military police are more committed).

The population is subject to uncertainty. And this does not mean labeling all Bolsonaro-supporting police officers as coup-plotters or antidemocratic, for that number would be even higher, but incorrect and unfair. Not every police officer who believes in Bolsonaro is a coup-plotter, but the radicalized portion that reproduces antidemocratic discourses is worryingly large. Thus, endorsement of Bolsonaro would not be a problem for the democratic social order if part of the police community and security organizations did not flirt with the extreme right and with reactionary conceptions that seek to undermine the rights achieved in the Federal Constitution. Even more so given that the data presented so far show

us that this movement of adherence to radical *Bolsonarismo* occurs in parallel with the fact that police forces, especially the military ones, enjoy great operational autonomy and are characterized by strong institutional insulation and low transparency in relation to their protocols and internal oversight mechanisms.

Bolsonaro is, in conclusion, a by-product of the persistence of Brazilian authoritarian thinking and, among police officers, he emulates conceptions of order that structure and assemble the institutional framework of public security in the country. However, as political processes are dynamic, the data brought here show that, if Bolsonaro mimics at first sight the hegemonic thinking of police officers, especially the military, he also poses a substantial risk to the police bodies themselves by presenting an anti-systemic discourse. Myths disregard institutions and demand absolute loyalty, with no room for contradiction and dissonance. Within the huge gap of democratic governance in public security, radicalized *Bolsonarismo* has found the perfect environment to subjugate the checks and balances of the state and become the Lernaean Hydra of the sector. The *Bolsonarismo* has already broken the merely individual dimension of police officers and now compromises part of the very functioning of the military and police institutions.

The picture is complex; in an election year, the limits for the survival of Brazilian democracy are tenuous, and constantly questioned by the then president, Bolsonaro, who puts in check the electronic electoral system itself, internationally recognized as one of the best in the world. Regardless of the success of a possible self-coup in 2022, the level of commitment of the Democratic Rule of Law is quite large and it will take years for institutions to be rebuilt.

Notes

1 "Corporativist" refers to the interests of personnel in a particular state institution, in this case, state police forces, and expressed in terms of demands for better salaries, working conditions, training, pensions, equipment, recognition, and the like.

2 Plano Collor (Collor Plan) (1990); PIAPS (*Plano de Integração e Acompanhamento de Programas Sociais de Prevenção da Violência* – Plan for Integration and Monitoring of Social Programs for Violence Prevention) (1999); 1º *Plano Nacional de Segurança Pública* (National Public Safety Plan) (2000); 2º *Plano Nacional de Segurança Pública* (2003); Pronasci (2006); *Plano Nacional de Redução de Homicídios* (National Plan for Homicide Reduction) (2016); 3º *Plano Nacional* (2017); and SUSP (2018).

3 Homicides went up 6% in 2020 when compared to 2019. However, public opinion does not attribute it to the president and mobilizes almost exclusively around the COVID-19 pandemic agenda (FBSP 2021).

4 This item draws on discussions originally made for the Brazilian Public Safety Yearbook (FBSP 2020) and republished, with updates, Lima (2021).

5 In Brazil voting is compulsory for literate citizens between 18 and 70 years of age. It is optional for people between 16 and 18 years, people over 70 years old, and for the illiterate (Justiça Eleitoral 2022).

6 Acronyms that have changed names are duplicated to maintain the nomenclature for each ballot. As of December 2019, Brazil had 33 registered political parties.
7 Political parties of the left: PC do B; PCB; PSOL; PSTU; and PT. Those of the center-left: PDT; PSB; PV; and REDE. Parties of the center-right: MDB; PP/PROGRESSISTAS; CIDADANIA; PSD, and PSDB. Political parties of the right: AVANTE, DC, NOVO, PATRIOTA, PL, PMB, PMN, PODE, PROS, PRTB, PSC, PT do B, PTB, REPUBLICANOS, and SOLIDARIEDADE.
8 This text will not address an associated but separate phenomenon of Bolsonarism among police officers, which is the expansion of militias in some states of the country. Militias are armed paramilitary groups formed by public security professionals who impose territorial control in various favelas and communities in Brazil, especially in the state of Rio de Janeiro, where according to the Map of Armed Groups in Rio de Janeiro (GENI 2021) militias control 56.8% of the territory of the state capital. Many of Jair Bolsonaro's supporters have links to them and they are part of the process of deterioration of the Brazilian public security system. Nevertheless, for the analysis proposed here, it is important to highlight that the growth of such groups is occurring alongside the process of strengthening the insulation and autonomization of the police forces. However, I do not see the growth of the militias as a cause and effect correlation with the election of Jair Bolsonaro. I understand that both processes are combined effects of the public security disjunction framework and that, as such, they need to be analyzed. The same applies to the participation of police officers in the activities of private security companies. There are multiple variables that influence the scenario of fear, insecurity, and violence in Brazil and that must have their influences isolated and measured.

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PART IV

COVID-19

12

THE HYDROXYCHLOROQUINE ALLIANCE

How Far-Right Leaders and Alt-Science Preachers Came Together to Tout a Miraculous Drug

Guilherme Casarões and David Magalhães

Introduction

Between mid–March and April 2020, the world witnessed some statesmen uniting around the promotion of hydroxychloroquine (HCQ), an antimalarial medicine purportedly efficient in treating COVID-19 patients. It all began on March 19, when Donald Trump came out to hail the drug – taken together with azithromycin – as having "a real chance to be one the greatest game changers in the history of medicine" (Trump 2020b). In the week that followed, loyal allies such as Jair Bolsonaro (Ministério da Saúde 2020) and Benjamin Netanyahu (Efrati 2020) started touting HCQ locally and ordered their own medical author-ities to include the drug in national treatment protocols.

Those leaders' enthusiasm sparked a widespread scramble for HCQ around the world. India, whose Council on Medical Research had asked health personnel and suspected cases to take HCQ as a prophylactic as early as March 22, made it harder to buy the drug and imposed an export ban a few days later to prevent shortages at home (Reuters 2020a). Hungary immediately followed suit, banning HCQ exports after declaring it a "strategic drug" on March 25 (Reuters 2020b). As more countries embraced HCQ therapies for COVID-19, the world seemed divided between a few pharmaceutical powers that held the key to overcoming the pandemic and several countries craving a miraculous medicine.

That might seem a bit over the top for a drug whose therapeutic benefits were (and still are) unclear. Despite several studies and reports (Kupferschmidt 2020), the use of HCQ has been controversial from the outset, mostly because of the risks of arrhythmia and other cardiac illnesses. Why, then, have some leaders actively touted the drug, even when it ran counter to recommendations made by their own governments' health authorities?

Our argument is twofold. First, HCQ has been an integral tool of medical populist performance in the context of the COVID-19 pandemic. We adopt Lasco and Curato's (2019) definition of medical populism as a political style based on performances of public health crises that put "the people" against "the establishment" using alternative knowledge claims to cast doubt on the credibility of doctors, scientists, and technocrats. Countering expectations that populists would either moderate their positions or get completely discredited in their response to the pandemic (Zabala 2020), HCQ promotion has allowed prominent far-right populist leaders to increase – or, at least, to maintain – their popularity at home.

Second, rather than being an individual endeavor, medical populism addressing the coronavirus crisis has led populists to build an alt-science network that serves as a platform for doctors, lobbyists, businesspeople, and religious leaders who are – or have become – linked to far-right movements across the world. Although there is no scholarly discussion of alt-science as of yet (see Waldman 2017; Engber 2017), we define it as a loose movement of alleged truth-seekers who publicly advance scientific claims at a crossroads between partial evidence, pseudo-science, and conspiracy theories. It comprises groups as diverse as maverick scientists, wealthy donors, flat-earthers, anti-vaxxers, and climate deniers, all united by their distrust of governments and mainstream science. While this is not to say that alt-science positions are intrinsically wrong or misleading, their political nature has been exploited by populists in their battle against the medical establishment.

In the world of far-right populists, the United States and Brazil are the two countries where the alt-science network around the promotion of HCQ came full circle – with presidents, politicians, media outlets, businesspeople, religious leaders, and scientists joining forces to advocate a fast and effective solution for the COVID-19 pandemic. In this article, we look at how the HCQ alliance was formed, as well as its political and policy implications, both domestically and internationally. To this end, we compare why and how Donald Trump and Jair Bolsonaro have engaged in medical populist performances when addressing the health crisis. By mobilizing the concepts of medical populism and alt-science, this chapter aims to contribute to the scholarship on the relationship between populist politics and policy-making.

Populism, Health Policy, and the COVID-19 Pandemic

We define populism as "a thin-centered ideology that considers society to be ultimately separated into two homogeneous and antagonistic camps, 'the pure people' versus 'the corrupt elite,' and which argues that politics should be an expression of the *volonté générale* (general will) of the people" (Mudde and Kaltwasser 2017, 6). However, because "the people" is an empty signifier, it makes populism a powerful political ideology and phenomenon, as it frames the idea of "the people" to generate a shared identity between different groups and facilitate their support for a common cause (Laclau 2005).

Populism depicts "the people" in three different ways: (1) the people as the source of sovereignty, from which political power stems; (2) the people as a constituent of a national identity (or a nation); (3) the people as the source of conventional wisdom, of "common sense." The third meaning is the one we will adopt in this article. It combines socioeconomic status with cultural and popular traditions. As it praises the average man, populism repudiates the prevailing cultural mainstream, which snubs the tastes, interests, and values of the ordinary citizen. Opposing such an "elitist" worldview, bringing the average man back onto the political stage is a way to restore dignity, popular wisdom, and the traditional knowledge of groups that have been sidelined from power, thanks to their cultural or economic status (Mudde and Kaltwasser 2017).

This anti-elitist outpouring reveals populism's suspicion and rejection of social and political gatekeepers, such as political parties, big corporations, bureaucracies, the mainstream media, or any other that could distort the authentic and organic connection between the populist leader and the "common people." Therefore, such an idea of the elite also encompasses the scientific community, universities, prestigious research institutes, the pharmaceutical industry, and even public health officials (Greer 2017).

Populists' demonization of science has profound effects on health-care policies. Parmet (2010) has shown, for one, that populist behavior undermined the efficacy of the H1N1 vaccination campaign in the United States as it fueled conspiracy theories and exacerbated a distrust of health professionals. More recently, Lasco and Curato (2019) have put forward the concept of medical populism to characterize a style of leadership that pits "the people" against "the establishment" in addressing health emergencies. Medical populists oppose traditional technocratic responses by politicizing, simplifying, and spectacularizing complex public health issues.

When the COVID-19 pandemic broke out and rapidly spread across the world, some analysts rushed to predict that populist leaders would not be able to tackle the crisis. Populism would become the first "ideological casualty" of the new coronavirus, since "regimes headed by populists are now facing a barrage of criticism that they cannot manage to divert or neutralize" (Paracha 2020). Therefore, the populist war on civil servants, experts, and scientific communities would quickly take its toll on leaders' distrust of science (Harris 2020). Also, populists face the growing risk of being exposed for who they are: "incompetent leaders who do little more than satisfy the interests of narrow business circles around them, while leaving their nations to economic precarity and social insecurity" (Zabala 2020).

However, rather than being stopped by the outbreak, some populists doubled down on their divisive, anti-elitist, and potentially authoritarian rhetoric (Müller 2020). Medical populism allowed leaders to pit "the people" against "the establishment" by sowing several cleavages in society: between professionals who could work from home and factory workers who could not; between the elderly who could not go outside and the young who were being kept inside by government

decree; and between formal workers who received wage subsidies and the self-employed who lost all income (Velasco 2020). Also, the pandemic both heightened fears of "the other" and emboldened politicians to pursue long-desired policies that would have been difficult without the pandemic (Abdelal 2020), from brutal police repression (as in the Philippines) to tight control of movement (as in India), from attacking political institutions (as in Brazil and Israel) to shutting them down (as in Hungary).

Whereas the diversity of populist responses to the pandemic makes it hard to predict whether "populism" will come out stronger or weaker from the health crisis (Mudde 2020), the impacts on policy tend to be long-lasting. By empowering alt-science advocates and forging far-right transnational networks, populists such as Donald Trump, Jair Bolsonaro, Narendra Modi, and Benjamin Netanyahu have attempted to improve their positions at home and abroad at the expense of mainstream science and national and international health authorities. The most visible face of this process was the early promotion of HCQ as a public health panacea. Despite promising results, this promotion of the drug has dismissed World Health Organization recommendations (WHO 2020), ignored medical recommendations, and gained political overtones that have muddied the scientific debate (Wessel 2020; O'Connor and Weatherall 2020).

The Forging of the Hydroxychloroquine Alliance

Although reports of clinical trials of chloroquine and HCQ against COVID-19 date back to early February 2020 in China (Subramanian 2020), their potential to tackle the pandemic only came to public knowledge several weeks later. On March 11, an Australian entrepreneur living in China, a Bitcoin investor and law school graduate, and a self-described philosopher pinned hope on the healing powers of a "miraculous drug" in a Twitter thread (Nguyen 2020). A couple of days later, the two of them coauthored and published a Google Docs paper making the case for chloroquine, which caught the eye of Silicon Valley businesspeople and conservative media outlets. On March 16, Tesla and SpaceX CEO Elon Musk tweeted a link to that paper suggesting that the antimalarial drug chloroquine might be effective in treating COVID-19. The document linked by Musk was later removed from Google Docs for violating the company's terms of service.

On that same day, French microbiologist Didier Raoult released the results of a small clinical trial that purportedly showed a 100 percent cure rate. The paper suggested that a combination of HCQ and the antibacterial medication azithromycin could be effective against COVID-19 (Gautret et al. 2020). On March 18, Gregory Rigano, one of the authors of the paper Musk had tweeted about, appeared on Laura Ingraham's Fox News show to promote his paper. The TV Channel took the opportunity to tout Raoult's study, reinforcing the alt-science case for HCQ.

Why alt-science? First of all, despite his bold claims of HCQ efficacy, Raoult's paper was harshly criticized in scientific circles for a lack of methodological rigor (Grens 2020). The day it was released, March 16, Anthony S. Fauci, one of the three members of President Trump's Coronavirus Taskforce, said on the very same Fox News show that the study was "anecdotal" from a scientific standpoint (Gabler and Keller 2020).

Second, the main characters involved in the early promotion of chloroquine – Raoult, Rigano, and Musk – have track records of scientific controversies. The French doctor, a populist in his own right, has often used his popularity on social networks to criticize politicians and scientists (Sayare 2020), to promote climate skepticism (Raoult 2013), and even to question the theory of evolution (Raoult 2011). Rigano sparked controversy by claiming his pro-HCQ paper had been produced in consultation with the Stanford School of Medicine, which was later rebutted (Gallagher 2020). Musk, once thought of as an environmental visionary, took a far-right turn – or, in his own words, "took the red pill" – as the pandemic broke out. On March 6, Musk's infamous tweet "the coronavirus panic is dumb" (Musk 2020) drew him closer to Trump and his supporters (Sanches 2020). The three were later joined by celebrity surgeon and TV show host Dr. Mehmet Oz, who became the most prominent medical voice advocating for HCQ on Fox News and elsewhere (Caulfield 2020).

On March 19, the HCQ alliance was finally set in motion as Donald Trump stepped up to declare, against his own top health advisor, that "chloroquine and hydroxychloroquine" had shown "very, very encouraging" early results. Eager to jump on Trump's bandwagon, Brazilian president Jair Bolsonaro quickly (and enthusiastically) embraced the antimalarial elixir as a "potential cure" for COVID-19 patients. On March 21, two days after the US president mentioned HCQ for the first time, Bolsonaro published a video on his social networks announcing that he had ordered the Army Laboratory to ramp up chloroquine production and the National Sanitary Surveillance Agency (*Agência Nacional de Vigilância Sanitária* – ANVISA) to ban the drug's export. He added that the Albert Einstein Israelite Hospital – Latin America's best, where Bolsonaro was treated after being stabbed on the eve of the 2018 elections – had started clinical trials with very promising prospects (Bolsonaro 2020a).

Case Studies of Medical Populist Responses to COVID-19

Trump and Bolsonaro's HCQ advocacy campaign may be explained as part of a medical populist performance. Both presidents wanted to dodge criticism of their early denial of the coronavirus's gravity by politicizing the pandemic and offering the public a quick fix that seemed promising enough to justify its adoption despite the lack of solid evidence. They also sought to strengthen their positions by joining forces with each other, on the one hand, and by amassing domestic support among prominent doctors and businesspeople, conservative politicians

and the media, and religious leaders, on the other. At the end of the day, foreign policy and health policies were directly impacted by this global medical populist response to COVID-19. In the following section, we will compare how those strategies have played out in the United States and Brazil.

The United States

Besides his populist, anti–intellectual, and anti-scientific traits (Goodman 2019), Trump's attitudes toward HCQ may be understood by a short–term political calculation related to the November elections. The Trump administration's posi-tive economic record was one of his strongest electoral assets – just before the coronavirus swept across the United States and destroyed more than 20 million jobs between March and May 2020 (Morath 2020). That explains why Trump's first reaction to the COVID-19 threat was to deny the gravity of the disease and criticize social distancing measures. While Trump has often boasted publicly that he had the situation under total control since the first COVID-19 case was confirmed in the United States, on January 21, 2020, he would only issue social distancing guidelines in mid-March (White House 2020).

As the US economy plummeted and unemployment insurance claims hit a record high, the appearance of a "miraculous drug" appeared to offer redemption to Trump as the presidential race drew near. Drawing on Raoult's updated study, published in the International Journal of Antimicrobial Agents on March 21, the US president began touting the combination of HCQ and azithromycin as "one of the biggest game changers in the history of medicine" (Trump 2020b). A few days later, the International Society of Antimicrobial Chemotherapy (ISAC), which is responsible for the journal where Raoult's research had been published, issued a note saying the article "does not meet the expected standard, especially relating to the lack of better explanations of the inclusion criteria and the triage of patients to ensure patient safety" (ISAC 2020).

Early evidence of HCQ use against COVID-19 was promising but feeble. To prevent people from scrambling for the drug, immunologist Anthony Fauci, longtime director of the National Institute of Allergy and Infectious Diseases (NIAID) and one of the lead members of the White House Coronavirus Task Force, dismissed HCQ benefits as "anecdotal" in a plea for caution (Flaherty and Phelps 2020). Yet Trump kept pushing the antimalarial drug. He ordered the Food and Drug Administration (FDA) to lift the ban on products from two of the local plants of India's Ipca Laboratories, which had been charged with data manipula-tion so that raw materials and HCQ tablets could be shipped to the United States (Palmer 2020).

Trump's sense of urgency led him to clash publicly with his top COVID-19 adviser. "I think Tony [Fauci] would disagree with me – but the reason I disagree with you is that we have a pandemic. We have people dying now" (Trump 2020c). The US president was playing the card that London and Kimmelman dubbed

"pandemic research exceptionalism," meaning that a public health crisis some-times demands exceptions to high standards of quality, such as large randomized controlled trials. However, the authors argue that "rather than generating permis-sion to carry out low-quality investigations, the urgency and scarcity of pandemics heighten the responsibility of key actors in the research enterprise to coordinate their activities to uphold the standards necessary to advance this mission" (London and Kimmelman 2020).

As the clinical success of HCQ was a matter of political survival for Trump, he started a race against the clock. A week after his first tweet about HCQ, the FDA issued emergency authorization for experimental coronavirus treatments with the antimalarial drug. In the days that followed, the president reached out to business groups and the pro-Republican media. At a meeting with Oracle's chairman Larry Ellison, who had recently hosted a fundraising event for Trump's reelection cam-paign in California, they suggested creating a system based on Oracle's database tools to track the use of chloroquine and HCQ in COVID-19 treatments. In order to increase HCQ stocks at home, the US government received donations from Novartis AG (30 million doses of HCQ) and Bayer AG (1 million doses of chloroquine) (Edney 2020).

Fox News also joined Trump's HCQ campaign. As Walker and Gogarty (2020) found, Fox News touted the drug approximately 300 times between March 23 and April 6, 2020. Most mentions were made in popular shows such as The Ingraham Angle (84 times), Fox and Friends (76 times), Hannity (53), and Tucker Carlson Tonight (22) (Gogarty and Walker 2020). Trump has gone as far as having host Laura Ingraham and two physicians at the White House to promote HCQ (Washington Post 2020).

On April 4, as the global crisis worsened and the demand for HCQ went through the roof, India's Directorate General of Foreign Trade imposed a blanket ban on HCQ and its formulations (Suneja 2020), which would cut off half of the United States' supplies of the drug (Bloomberg 2020). Since malaria is one of the country's major public health problems, India holds the lion's share of the HCQ production market – manufacturing about 70 percent of the world's supply – and exports $50 million worth of it every year (Balasubramanian 2020). A few weeks before, Indian Prime Minister Narendra Modi had already announced restrictions on exports, except on humanitarian grounds or for those who had made their advance payments in full.

At his daily briefing later that day, Trump said that he had spoken with Modi, asking him to release the amounts of HCQ the United States had ordered. Although there seemed to be nothing unusual about the reference to the Indian Prime Minister, it was clear that Trump sought to raise the tone of his public appearances, as he admitted that up to 200,000 people could die from the epi-demic and added that his government would retaliate if "people" did not give Americans the masks they had bought (Farzan et al. 2020). Modi promptly responded on his Twitter account: "Had an extensive telephone conversation

with President @realDonaldTrump. We had a good discussion, and agreed to deploy the full strength of the India–US partnership to fight COVID-19" (Modi 2020).

But the tide turned for India in a couple of days. In another press briefing, Trump said he would retaliate against Modi if he kept withholding supplies of HCQ for which the United States, Brazil, and other countries had placed advance orders: "If he doesn't allow it to come out, that would be okay, but, of course, there may be retaliation. Why wouldn't there be?" (Raj 2020). The US president's threat caused shock and awe among the Indian public since both populist radical right leaders enjoyed a blossoming relationship and had recently exchanged bilateral visits.

Hours after Trump's public pressure, the Indian Prime Minister lifted the ban on HCQ (and paracetamol) for neighboring countries and "to some nations who have been particularly badly affected by the pandemic" to clear "all existing orders" (Basu 2020). Following the new directives, Indian exports of HCQ would take place under two categories: commercial supply and humanitarian aid. While one of the purposes of the move was to increase India's economic and political rivalry with China, which was under fire (particularly in the West) for its mismanagement and lack of transparency in handling the early stages of the outbreak (Mishra 2020), the sudden rise of a "hydroxychloroquine alliance" reinforced the strategies of some far-right populists across the world.

That explains those leaders' enthusiasm toward India's HCQ supplies. Trump celebrated Modi's decision on Twitter: "Extraordinary times require even closer cooperation between friends. Thank you India and the Indian people for the decision on HCQ. Will not be forgotten! Thank you Prime Minister @NarendraModi" (Trump 2020a; 2020e). The Indian Prime Minister's response pointed to the populist radical right alliance: "Times like these bring friends closer. The India–US partnership is stronger than ever" (Modi 2020b). To the United States, Trump's remarks on possible retaliations following India's export ban, as well as Modi's immediate concession, have served to reaffirm American power – as well as Trump's steadfastness – in face of China's growing role in fighting the pandemic globally.

By advocating HCQ as a miraculous drug despite inconclusive clinical evidence (either for or against its use), Trump reinforced his medical populist rhetoric that belittled the role of the "elitist" scientific community and praised the "conventional wisdom" of the average American. "So what do I know? I'm not a doctor. But I have common sense" (Trump 2020d), Trump bragged before the members of his own COVID-19 Task Force. Unsurprisingly, Trump's attitudes against science sowed discord among the administration's medical experts and led to a tug-of-war between the president and Dr. Fauci. To prove his point against research that pointed to the side effects and health risks of HCQ, Trump claimed he was taking the medicine preventively.

> I take a pill every day. At some point I'll stop. What I'd like to do is I'd like to
> have the cure and/or the vaccine and that'll happen I think very soon. [...]
> It seems to have an impact, and maybe it does, maybe it doesn't.
> *Crowley, Thomas, and Haberman 2020*

One must note, however, that Trump progressively abandoned his advocacy of HCQ as polls showed that the American public favored science, personified in Dr. Fauci, in fighting COVID-19 as the number of deaths surpassed 100,000 in the United States by late May 2020 (Bump, 2020). In mid-June, the FDA revoked its emergency-use authorization for the two malaria drugs, claiming that it was "no longer reasonable to believe they may be effective in treating COVID-19" (Burton and Hopkins 2020).

Brazil

As social networks and WhatsApp groups were flooded with vague accounts of the alleged beneficial effects of HCQ for treating COVID-19 patients, demand for the medication boomed in Brazilian drugstores (Oliva 2019). The day after Trump's public endorsement of the antimalarial drug, ANVISA included chloroquine and HCQ in a list of controlled medicine (ANVISA 2020). Bolsonaro's tweet on the antimalarial drug as a "possible cure" for the novel coronavirus only added to the craze in Brazil, as searches for chloroquine and HCQ on Google soared and the number of Twitter mentions grew exponentially (Spagnuolo and Orrico 2020).

Fact-checking agency *Aos Fatos* showed how false reports and misinformation spread quickly on social networks after Bolsonaro's announcement, jumping from 8 to 45 percent of Brazil's most popular shared tweets. One of the most recurring lies claimed that HCQ had proven efficacy in treating COVID-19 patients (Fávero and Libório 2020).

As in the United States, Bolsonaro embarked on a daily journey to convince public opinion of HCQ benefits, while bashing social distancing measures implemented by state governors and some big-city mayors. With his popularity hitting all-time lows as he entered his second year in office, Bolsonaro feared that the economic slowdown could undermine his short-term political capital even further (Sakamoto 2020).

If HCQ was a lifeline to the president's political survival, he also wanted to reassemble his political base by resorting to economic populism to pit his supporters – especially small and large businesspeople, and informal and autonomous workers, who were suffering the immediate effects of lockdown and distancing policies – against governors, lawmakers, and the mainstream press. By manifesting his indignation at state governors, who did not want to include religious activities as essential services, Bolsonaro also reached out to the powerful Pentecostal leaders who have long supported him.

As a sign of faith in the miraculous powers of HCQ, the Brazilian president even displayed a box of Reuquinol by his side during his participation in the G-20 teleconference on March 26, 2020 (Andrade 2020). That is the brand name of HCQ manufactured by Apsen, whose CEO Renato Spallicci is an ardent supporter of the Bolsonaro administration and often defends the president on social media. Meanwhile, Bolsonaro requested the Brazilian Chamber of Foreign Trade to eliminate import taxes on chloroquine, azithromycin, and raw materials and ordered the Army Lab to manufacture 1 million doses of HCQ (Waltemberg and Valeda 2020).

It was not long before Bolsonaro's aggressive advocacy of the malaria drug sparked tensions in his own cabinet. Brazil's then-Minister of Health Henrique Mandetta, who had received early praise for mobilizing Brazil's universal health-care system (SUS, in the acronym in Portuguese) and supporting social distancing measures, began alerting the population of the risks of self-administering HCQ, as it could cause severe heart problems. Mandetta's defense of "science" to guide policy-making in the COVID-19 fight came much to the president's chagrin, as Bolsonaro, like Trump, was waving the flag of "pandemic research exceptionalism." Bolsonaro responded as he did with other ministers who had also left the government: reaffirmed that he was the one in charge, isolated and challenged the minister in public events and meetings, while the president's supporters began attacking Mandetta's reputation on social media (Amado 2020a).

Between late March and early April 2020, a vast network of pro-Bolsonaro public figures and lawmakers was formed around the promotion of HCQ, based on partial research undertaken by the Prevent Senior operator (a Brazilian company which sells health insurance for the elderly and has a hospital in São Paulo) that allegedly showed positive therapeutic results.[1] An op-ed written by Helio Beltrão (Beltrão 2020), chair of the libertarian Brazilian Mises Institute, and an interview given by the University of São Paulo virologist Paolo Zanotto to the far-right website Brasil Sem Medo (Brazil Without Fear) quickly became staples among the president's supporters. Echoing Bolsonaro's narrative, their chief claim was that the medical and scientific communities refrained from adopting HCQ protocols on ideological grounds. "If chloroquine was called [former president] Lula's drug, not Bolsonaro's or Trump's, I assure [you] it would be a success," said Zanotto (Briguet 2020a).

On April 4, Beltrão, one of the most vocal supporters of the over-the-counter commercialization of HCQ, made a live broadcast with a Prevent Senior manager, Dr. Pedro Batista, Jr., and virology professor Zanotto (Beltrão 2020b). They wanted to transform Prevent Senior's protocol into a national one, along the lines of what Bolsonaro had advocated from the start. They also took the opportunity to bash Health Minister Mandetta, who had authorized the supervised use of HCQ in patients with severe conditions but was not willing to adopt the early use of the drug before more robust research came out.

The clash between the president and his top health advisor reached a peak on April 12, 2020, when Mandetta gave an interview on TV Globo – a Brazilian free-to-air television network and one of Bolsonaro's declared enemies – standing up for social isolation and complaining that Brazilians were lost as to whom they should listen to, the health officials or the president. By then, it seemed clear that the minister's days were numbered. It took four days for him to be sacked. But Mandetta did not leave office without making public that, the week before, Bolsonaro had secretly pressured him to sign a decree changing HCQ's prescription leaflet to include recommendations for COVID-19 (GZH 2020). Together with the president were anesthesiologist Luciano Azevedo, who is known for his ultraconservative militancy, and immunologist Nise Yamaguchi, who also campaigned for HCQ in the media, including on some far-right websites (Briguet 2020b).

Although those two pro-chloroquine doctors were among Mandetta's likely successors, Bolsonaro ended up appointing a former campaign advisor, physician, and businessman Nelson Teich. He was considered a "less controversial" name in the medical community and seemed to support some of Bolsonaro's ideas on how to tackle the crisis (Vargas and Soares 2020). However, Teich's reluctance to adopt HCQ in the national protocols without scientific backing and to speak against social distancing made him one of the shortest-lived ministers in Brazil's recent history, lasting less than a month in office (Souza et al. 2020).

Tensions between the president and the Ministry of Health were only allayed when Bolsonaro decided he would keep the interim minister, Army General Eduardo Pazzuello, to make sure HCQ would be included in the national treatment protocol for all COVID-19 patients. Besides adopting a new protocol on May 20, which came under heavy congressional protest, Pazzuello appointed 13 Army officers to top positions in the ministry. Neither he nor his direct aides had specific medical training or previous experience in health policy-making (Amado 2020b).

A last note on Bolsonaro's medical populism refers to the religious underpinnings of his HCQ approach. Bolsonaro's appeal to Christians has always been an important element of his popularity, which may explain his permanent reference to Biblical verses and his close relationship with ~~Evangelical~~ leaders, some of whom have been staunch chloroquine advocates (Casarões 2020). Unsurprisingly, disinformation campaigns during the COVID-19 pandemic have either begun or gained momentum in religious networks (Machado et al. 2020).

The religious leanings of Bolsonaro's medical populist performance have both domestic political and foreign policy implications. After being tested positive for COVID-19, on July 7, 2020, President Bolsonaro announced that he was taking chloroquine as part of his treatment. Over the course of that day, he mentioned the medicine 17 times as a potential cure for the disease. In the weeks that followed, he appeared a few times lifting a box of chloroquine before huge crowds, which

hailed the drug as some sort of religious symbol – reinforcing Bolsonaro's own messianic character (Sakamoto 2020).

Finally, on the global stage, the Brazilian president followed Trump's steps and thanked Prime Minister Modi on his social networks after the Indian Prime Minister lifted the export ban. Bolsonaro's letter of gratitude to the Indian government invoked religious elements that speak to both leaders' populist strategies in an unusual comparison between the Hindu epic Ramayana and the Bible:

> Just as Lord Hanuman brought the holy medicine from the Himalayas to save the life of Lord Rama's brother Lakshmana, and Jesus healed those who were sick and restored sight to Bartimeu, India and Brazil will overcome this global crisis by joining forces and sharing blessings for the sake of all peoples.
> *The Hindu 2020*

A few months later, on May 31, 2020, Bolsonaro again expressed Brazil's gratitude for the US act of solidarity. No longer interested in touting HCQ, Trump had decided to deliver 2 million doses of the medicine "to the Brazilian people" (Ministério das Relações Exteriores 2020).

Final Remarks

Even though the use of HCQ became an important instrument of far-right populists all across the globe, it has played different domestic and international roles. Thanks to the power-concentrating nature of presidents (as opposed to the political constraints of the parliamentary systems of India, Israel, or Hungary), Trump and Bolsonaro have been able to fully exert the strategies and performances of medical populism. They have persistently touted HCQ in spite of feeble scientific evidence, in an attempt to garner and secure political support by pitting the masses (or "the people") against doctors, mainstream scientists, and public health authorities (or "the establishment"). HCQ seemed like the perfect populist tool not only because of promising prospects, but especially due to the fact that it emerged from, and helped foster, a far-reaching alt-science movement, in an unusual alliance between Silicon Valley entrepreneurs, the far-right media, and maverick scientists such as Didier Raoult, whose views on HCQ validated efforts by local agents, such as Brazil's Prevent Senior operator and several Bolsonaro supporters.

The urge in seeking a solution to the COVID-19 outbreak and the populist tendency to offer simple solutions to complex problems led leaders in Brazil and the United States to run counter to expert advice, as became clear in the clashes between Trump and Dr. Anthony Fauci and Bolsonaro and his two health ministers, Mandetta and Teich, with dramatic policy implications. It also led those leaders to form an overarching alliance of far-right influencers, businesspeople, and leaders, which has also included India, whose Prime Minister wanted to position himself as the world's key medicine supplier to fight the global pandemic,

and Israel, whose Prime Minister used HCQ as a sign of his steadfast leadership as he tried to form a new government. All in all, one may wonder whether the United States and Brazil could have prevented the disastrous COVID-19 response that has placed them as the two leading countries in cases and deaths if Trump and Bolsonaro had followed scientific, evidence-based guidelines from the very outset of the crisis.

Note

1 The study has been described by French geneticist Gaetan Burgio as follows: "this is [a] really really bad study and awful science" (Burgio 2020).

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13

POPULISM, THE PANDEMIC, AND THE CRISIS OF *BOLSONARISMO*

Leonardo Avritzer[1] and Lúcio Rennó

The concept of populism has many entry points. Marxists considered it an indicator of a gap between class and class consciousness. Mass politics for Marxists was problematic given insufficient class consciousness (Germani 1974; Kaysel 2016) and would eventually lead to a disconnection between politics and the class party. Populism was the expression of such disconnection. Liberals considered populism to indicate mass political pressure upon an institutionalized political system (Huntington 1968; La Palombara and Weiner 1966). Every political system had a limited processing capacity and populism would emerge when demands would overcome institutions' capacity to process such demands. Populism built itself upon the gap between the rising demands of the masses and a political system with limited capacity to satisfy those demands due to the balance of power structures. During the last decade in Latin America, populism adapted its historical critique of the political system to a demand for a strong, immediate, and non-mediated representation of the people (Mouffe 2019; Rosanvallon 2020). Populism was once considered to be a postwar adaptation of an antiliberal pattern of politics to a new democratic order (Finchelstein 2017) and now challenges the balance of power of that order and the relation between the people and their representatives.

Latin America has been considered the "land of populism" and has spawned classic, neoliberal, and radical types of phenomena (De la Torre 2017). However, the last decade has shown that populism is an even more complex phenomenon that can thrive both in developed and underdeveloped economies as well as in consolidated and nonconsolidated democracies. One of the reasons why populism was considered a problem principally affecting developing economies and unconsolidated democracies was that despite high demand for populism in liberal democracies there were limitations on the supply side. That is, the non-mediated form

of politics that populism advocated is more difficult to implement in consolidated democracies.

In this chapter, we draw on the understanding that populism has two dimensions: the first is a political proposal to deny the importance of mediating institutions such as parties and the media (Peruzzotti 2020) and to impose the complete sovereignty of the political leader. The second is a public opinion dimension that allows the populist leader to gather and to concentrate power. In short, populism operates at both elite and mass levels. Political elite strategies are the supply side of populist strategies showing that populism is an adaptation of the Schumpeterian model of elites providing an offer through the political system to the masses (Schumpeter 1942). To be successful, those strategies must find support in sectors of the citizenry (Mudde and Kaltwasser 2017, 20). Successful populists "are able to combine a broad range of societal grievances around a populist discourse" (ibid., 104). In this sense, there must be some form of elite/mass congruence regarding populist alternatives and positions, even if these are not static elements and may vary over time.

Both in the United States and the United Kingdom, there were forms of containment of populism despite the high level of demand. Gatekeeping in the early 20th century limited the rise of populism in the United States, despite Henry Ford and Charles Lindbergh's attempts to play the outsider card (Levitsky and Ziblatt 2018). Three actors played key roles in avoiding the emergence of populism: parties, business elites, and the media. As Levitsky and Ziblatt (2018) point out, the primary system in the United States was the main gatekeeping institution through the superdelegates process. Thus, gatekeeping limited the outsider discourse giving the two parties in the United States a high bar for supplying populist policies during elections. In addition, business elites limited the amount of money that candidates could raise to make their proposals. Last, but not least, huge media outlets placed populist discourses outside the mainstream and could effectively block them. In the last decade, the new role of the primaries in the United States together with the enormous expansion of social media removed at least two of these three gatekeeping institutions, normalizing outsider discourse, against the expectations of many political scientists (Huntington 1968; Przeworski 2019).

Brazil is a key case for understanding populism for several reasons. First, it is a case of strong deterioration of trust in the political system built around two axes: corruption charges corroborated by the Lava Jato (Car Wash) anti-corruption operation (2014–2021) that help to build an idea of pure versus impure and to place the political system in the dimension of a privileged group above the law (Avritzer and Marona 2017; De Sá e Silva 2020) and major demonstrations against the political system from 2013 to 2015 and 2016 that help to rehabilitate the conception of outsiders in politics (Tatagiba and Galvão 2019; Avritzer 2020).

Gatekeeping elements have never been strong in Brazil. During the first democratic experience in Brazil (1945–1964), gatekeeping was conducted by forces outside the realm of political competition: the military, the media, and business

elites served as gatekeeping institutions through the enforcement of credible threats both to political competition and to governability.

The recent democratic experience in post–1980s Brazil created more barriers to populism but did not change the demand side. At the same time, large-scale fragmentation of the political system created a sort of political menu that had the PT (*Partido dos Trabalhadores*, or Workers' Party) or PSDB (*Partido Social Democratico Brasileiro*, or Brazilian Social Democratic Party) at the top, but still managed to incorporate lower down a broad array of coalition parties.

The emergence of a new type of right-wing populism in Brazil is linked to changes in gatekeeping institutions that affected both the demand and the supply sides of populism. The low bar for party formation and flexible membership rules effectively allowed outsiders to run. Other recent institutional changes reduced the official campaign period, set limits for campaign costs, prohibited campaign donations by firms, and expanded public funding.

In addition, there are several explanations for the emergence of popular support for populist alternatives. One influential perspective is related to individuals who have suffered some form of loss, social or economic, over the years and blame the mainstream political parties and elites for it are very likely to support charismatic outsiders who espouse rhetoric that resonates with citizens' daily challenges and criticize the system for its corrupt ways. A complementary explanation focuses on a cultural backlash that in addition to economic downfall increases resistance to progressive social change that occurred in prior years related to gender politics and to environmental and scientific approaches to sustainable development (Inglehart and Norris 2016; 2017).

In particular, we will explore, first of all, how the conception of anti-politics was built in Brazil, leading to the electoral victory of Bolsonaro and his anti-political cabinet; second, we will approach the issue of the perceptions of social mobility, as an indicator of status threat or gain, that lead to support for the Bolsonaro government. This is an important explanation for vote choice for populist leaders, but also a central component of explaining vote choice in Brazil (Peixoto and Rennó 2011; Amaral 2020). Prior studies in Brazil show that perceptions of downward mobility are positively correlated with votes for Bolsonaro in 2018 (Amaral 2020), as the literature on populism would expect.

In the 2018 election, Bolsonaro built a coalition that cut across demographic and socioeconomic lines and addressed popular concerns in line with the classical demand-side explanations for the emergence of populism (Rennó 2020, 15). The crisis of the leftist governments (the PT controlled the presidency from 2003 to 2016) created a new middle-class demand for populism. Anti-corruption demonstrations by the middle class changed the conditions for the legitimacy of the political system. Yet, the likely winner of this new demand, the center-right forces, did not manage to create a proposal capable of attracting the dissatisfied middle class. However, the most impressive side of the supply for populism during the campaign was the fact that Bolsonaro proposed to implement a very restrictive

and anti-state economic agenda – revisiting the neoliberal populist agenda of the 1990s. Businesses made the unlikely move of supporting a populist right-wing candidate on the promise that it would be allowed to choose the economic policymakers. This arrangement allowed Bolsonaro to overcome the three existing barriers to populism: the party barrier, the business barrier, and the media barrier. Even parts of the liberal middle class supported Bolsonaro in 2018. Hence, Brazil elected the first outsider in more than 20 years through a rearrangement of the gatekeeping elements of the electoral system.

Anti-Politics, the *Bolsonarista* Movement, and the Creation of a Conservative Coalition

Bolsonarismo as a form of right-wing populism was formed between 2015 and 2018. In 2015, the *Lava Jato* anti-corruption operation and the 2016 impeachment of President Dilma Rousseff (2011–2016) led Brazilians to take to the streets with the idea that the sharp economic crisis that led to the worst recession in the country's history was the result of corruption. As former president Dilma Rousseff was impeached in August 2016 and corruption scandals erupted in the administration of President Michel Temer (2016–2018), the idea that became strong in Brazil was that institutions and elected representatives were privileged and "impure" and that decision-making should be transferred to other institutions such as the judiciary or public opinion or even the armed forces. Anti-politics as the search for an outsider not tainted by normal politics led to the denial of positive attributes of politics such as negotiation or the formation of coalitions or even the need of a political system.

Thus, anti-politics in Brazil was constituted by two elements: first, legal punitive measures. In that case, a police operation against corruption was transformed into anti-republican factionalism, through which the leftist camp was constructed as corrupt and power was accumulated through acts that went well beyond the rule of law. Sergio Moro (the federal judge who convicted former President Lula of corruption in 2017) and Deltan Dallagnol (the federal prosecutor who charged President Lula in the same case) were specialists in this construction that later was expanded to the political system as a whole. They were the ones who initially invested in building tension with the Federal Supreme Court (*Supremo Tribunal Federal*, or STF), later widely used by *Bolsonarismo* as a strategy to perpetuate conflict and crisis and a typical populist strategy. The STF played the game that led to Bolsonaro's election. In this context, either the STF accepted selectivity and punitiveness, or it was the target of aggression on social networks and the streets. Thus, while the Lava Jato anti-corruption operation was situated in the judicial field, it was a form of disembeddedness between the legal system and politics. According to this conception, the role of the judiciary is to go beyond the legal norm to sanction deserved punishments of political actors or even to apply policies judicially.

The second element of this conception of anti–politics is the replacement of government by a judicially sanctioned moral conception. It was part of the structure of the Lava Jato operation to prevent government acts through legal means. This is how the appointment of ex-president Lula as Dilma Rousseff's Chief of Staff (*Chefe da Casa Civil*), an exclusive attribution of the president, and later the Christmas pardon were nullified by the judicial system.[2] At the same time, judicial privileged appeared high on the target list of the right-wing and conservative sectors in Brazil. Still, during the electoral process of 2018, *Bolsonarismo* sided with Lava Jato in its anti–political stance and started an anti–Supreme Court discourse that continued into his presidency.

The third element of anti-politics in Brazil is the belief in the superior efficiency of military administration. The most important caveat of the Brazilian transition in comparative terms was the lack of a process of transitional justice (Pereira 2000; Zalaquett 1996). The military withdrew from the political scene without paying any costs for human rights violations and accusations of corruption. A decade after democratization, the military recovered the trust of public opinion and returned to politics, again claiming to be less corrupt and more efficient than politicians. This led to the idea of a military intervention or at least an administration with a strong military presence that Bolsonaro would implement after his election.

The year 2018 started with a very low level of trust in political institutions that was the consequence of the impeachment, the corruption scandals investigated by the Lava Jato operation, and the disastrous performance of the post-impeachment administration of Michel Temer whose approval rate sunk even below Dilma Rousseff's rates (Folha de São Paulo 2018). In the first poll carried out by "*Instituto da Democracia*"[3] in March 2018,[4] it was possible to find out two interrelated movements at the level of public opinion that could lead to Bolsonaro's electoral victory.

The first one was a further relativization of the support for democracy. Brazil has had low levels of support for democracy in comparison to both consolidated democracies and the Southern Cone democracies. Only after the broadening of social services and the huge decrease in poverty levels, it started to climb in Brazil by the end of the first decade of the century. However, all these advancements were rapidly reversed by the political crisis. In March 2018 for the first time in a few decades, the percentage of Brazilians who thought that certain circumstances would justify a break with democracy was slightly above 50% of the respondents as Figure 13.1 shows.

The second important change was the dismal level of trust in political institutions. Trust in democracy and political institutions in Brazil has been lower than in its Southern Cone neighbors. However, the level of distrust in political institutions went beyond anything imaginable as trust in political parties sunk to a little more than 1% of the population, and trust in the national congress sunk to a little higher than 5%.

Thus, the election of Bolsonaro was the result of the construction of a very singular conception of anti–politics that anchored his right–wing populism. This
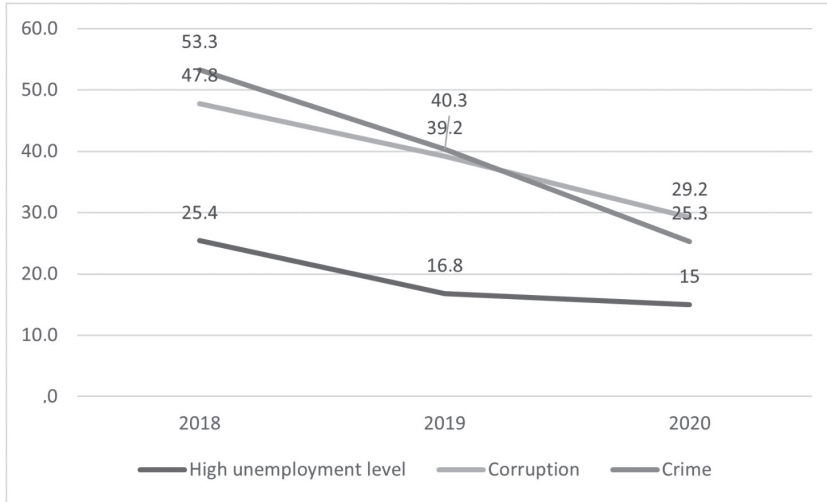
FIGURE 13.1 ~~Bolsonaro's Collective Performances of the Political Elite and the Brazilian People~~

conception regarded the political system as unnecessary, trusted nonpolitical forms of decision-making and focused on the military as an alternative source of governance. The first Bolsonaro cabinet was an expression of this conception.

The nomination of Jair Bolsonaro's cabinet showed the level of non-commitment with governability, parties, and public policy. Bolsonaro nominated an anti–political cabinet headed by two nonpolitical stars: Sergio Moro, the former Lava Jato judge in Curitiba, was supposed to be the top star of the cabinet in his commitment to expanding Lava Jato to other areas of the Federal government, particularly the Ministry of Education (Table 13.1).[5]

A brief analysis of Bolsonaro's cabinet provides evidence of his difficulty in governing, especially during the first two years of his term. First, Bolsonaro's own party the PSL (Partido Social Liberal or Social Liberal Party) received a very small part of the portfolio and Bolsonaro fired the only important minister of the PSL a month into his administration. Second, except for the Democrats (a political party), the cabinet was mostly technical, distant from political parties, endangering and complicating negotiations with Congress. Sergio Moro, the star Minister, the Minister of Justice, did not survive for more than a year. As Bolsonaro sacked ministers who did not obey him, align with his policies, or serve his family's interests, he increased the number and the importance of military members of the cabinet. Thus, he substituted Gustavo Bebianno, a key member of his electoral campaign, for general Floriano Peixoto, and later he substituted Onyx Lorenzoni for General Walter Braga Netto, a close member of his military circle who would later become the Minister of Defense.

TABLE 13.1 Composition of Bolsonaro's First Cabinet

Professional origin in Ministério Público, the federal prosecutorial service and other areas of the judicial system	Sérgio Moro (Ministry of Justice) and André Mendonça (Federal Supreme Court)
Professional origin in the Army	Fernando Azevedo (Ministry of Defense), Augusto Heleno (Institutional Security of the Presidency), Carlos Alberto dos Santos Cruz (Secretary of Government of the Presidency), Wagner Rosário (CGU, Controladoria Geral da Uniao or General Controllorship of the Union, a federal auditing agency), and Tarcísio Gomes (Ministry of Infrastructure)
Ideological group (*olavistas* or followers of Olavo de Carvalho)	Ricardo Velez Rodriguez/Abraham Weintraub (Ministry of Education), Ernesto Araújo (Foreign Ministry), Damares Alves (Ministry of Women, Family, and Human Rights), and Ricardo Salles (Ministry of the Environment)
Coming from the Democrats (*Democratas*, a political party)	Onix Lorenzonni (Chief of Staff of the Presidency), Tereza Cristina Correa de Costa Dias (Ministry of Agriculture), and Luis Henrique Mandetta (Ministry of Health)
Coming from the *Partido Social Liberal* (PSL) or Social Liberal Party	Gustavo Bebbiano (General Secretary of the Presidency) and Álvaro Antônio (Ministry of Tourism)
Coming from MDB (*Movimento Democratico Brasileiro*, or Democratic Movement Party)	Osmar Terra (Minister of State for Citizenship)
Market	Paulo Guedes (Ministry of the Economy) and Roberto Campos Netto (Central Bank)

Note: Many of these positions have changed with new appointments.

Three ministers were appointed to disorganize or dismantle areas of public policy organized by the left, namely, education, the environment, and human rights. Their role would be to disassemble structures of public policy in these areas. Thus, the Minister of Education Ricardo Velez Rodriguez and later Abraham Weintraub (who substituted Velez after a couple of months) cut 25% of the discretionary budget of federal universities, reducing funds for research. This cut included the elimination of 3,474 graduate-level research fellowships in federal universities. Salles discontinued most programs in IBAMA (*Instituto Brasileiro de Meio Ambiente e Recursos Naturais*, or Brazilian Institute of the Environment and Natural Resources), the institute in charge of enforcing environmental law, and later Bolsonaro himself fired the scientist in charge of monitoring fires in the Amazon region. It is possible

to argue that Bolsonaro did not have any other aim in these areas beyond disassembling structures built during the New Republic period. To use Lawrence et al.'s (2009) terminology, these areas of government witnessed an aggressive strategy of institutional disruption by members of the Bolsonaro government. The interruption of several programs was not necessarily followed by the substitution by new ones, leaving entire sectors of these ministries inoperable.

Bolsonaro during his first year in the presidency ignored policy issues and opted for a movement-oriented agenda. He did not constitute a majority in Congress in his first two years, which resulted in record numbers of vetoes, overturned vetoes, low approval rate of ordinary legislation proposed by the Executive Branch, and a high number of rejected provisional measures. In addition to that, in the areas he chose to disassemble, his administration's performance was not oriented to results – unless institutional disruption is considered as such. However, there was one sector in which this conception did not work, the area of health policies.

Populism, The Pandemic, and Bolsonaro's Negationism

One area of public policy that could be eligible for policy change was left untouched by *Bolsonarismo* was the area of health where SUS (*Sistema Único de Saúde*, or Unified Health System, Brazil's national public health service), the immunization program, and Saúde da Familia (Family Health Program) were successes that became references for the population throughout democratization. The nomination of a politician with a tradition of policy-making in the area to the Ministry of Health was an indication that policy change was an aim and that Bolsonaro did not want to disassemble health structures in the same way he did with education or the environment. Yet, this would become the most contentious arena of Bolsonaro's administration given his negationist positions regarding the COVID-19 pandemic (Rennó and Borges 2021; Gramacho and Turgeon 2021; Bertholini 2022).

Brazil confirmed its first COVID-19 cases on February 26. Unlike the United States, where Trump participated in press conferences about the outbreak, in Brazil the Minister of Health led the daily press conferences, in which he announced the numbers of cases and deaths and presented policies and federal coordination efforts in terms of supply acquisition and distribution. The Brazilian Minister of Health, Luis Henrique Mandetta, was an exception in terms of Bolsonaro's top echelon. Mandetta was a critic of the health program called "*Mais Médicos*" (More Doctors), a program initiated in 2013 during the presidency of Dilma Rousseff that recruited 15,000 mostly foreign doctors to work in peripheral areas in the interior as well as the outskirts of major cities in Brazil. Despite this, he was in favor of the SUS and had successfully carried out a public campaign against dengue during his tenure as health secretary in Campo Grande, the capital Mato Grosso do Sul state. Mandetta organized the Brazilian response to COVID-19 according to the existing international pattern at that moment. He carried out daily briefings and tried to use the ministry as a source for a more equal distribution of health

resources among the states. Thus, it is possible to state that Brazil was relatively well prepared for the pandemic which landed in the country late and allowed for some preparatory efforts.

However, at the same time that the Ministry of Health was preparing the government to handle the pandemic, the *Bolsonarista* movement was moving toward an anti-political response. Bolsonaro continued with informal and social media–diffused speeches and the coronavirus did not become central in his personal agenda, although he mentioned the pandemic through his efforts to downplay the severity of the crisis. In early March, while visiting the United States, he stated that the outbreak was "fantasy" and was "not that much of a deal despite the mass media efforts to spread fear around the world." He also called COVID "a small flu" (*gripezinha*). The World Health Organization (WHO) declared COVID-19 a pandemic on March 11, and four days later Bolsonaro interacted with supporters, claiming to be "demonstrating that I am with the people." While governors and the Ministry of Health suggested social distancing, the president engaged in several demonstrations – some of them openly praising the military regime and demanding the seizure of the Supreme Court – and visited cities around the capital, Brasília, disregarding any preventive measures to combat the pandemic. When the country reached 5,000 deaths, a reporter mentioned that Brazil had surpassed China's death toll, to which the president answered, "So what? I am sorry, what do you want me to do?" In August 2020, when Brazil reached 100,000 COVID deaths, the president instead stressed the number of citizens that had recovered from the viral infection (Figure 13.2).
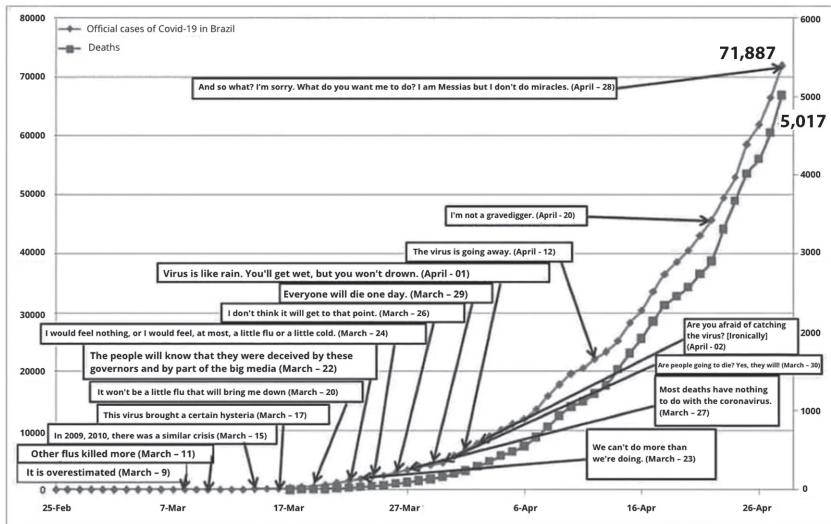

FIGURE 13.2 Bolsonaro's Remarks on the Pandemic and the Number of Cases (March–April 2020)

An interesting question to be posed is: why did Bolsonaro champion a negationist position even in a situation in which he could play the role of the successful administrator, did some of the other right-wing populists such as Victor Orbán, Prime Minister of Hungary? Instead, Bolsonaro invested in conflict and in perpetuating the crisis, rather than encouraging people to "rally around the flag."

The *Bolsonarista* logic was that these policies were not in the Captain's (as Bolsonaro is known) political base interest. Jair Bolsonaro, the politician, built a formidable network of attacking his opponents on social media, first as a candidate and then as president. The *Bolsonarista* machine on the internet is (or was) made up of three main groups: a group that refers directly to the president and his children, called the "hate office," which launches processes of uncritical ratification of the president's positions in social networks. The second is a vast network of slightly more moderate right-wing websites and profiles that have in the past included movements such as the MBL (*Movimento Brazil Livre*, or Free Brazil Movement, a right-wing movement that has been active since 2014 and was a major protagonist in the protests in favor of the impeachment of President Dilma Rousseff), *Vem pra Rua* (Come to the Street, another right-wing movement also founded in 2014 and active in the pro-impeachment protests), and sites such as *O Antagonista* (the Antagonist, a journalistic website of right-wing political opinion), which amplified the defense of the president's positions beyond the *Bolsonarista* networks. Finally, Bolsonaro was supported by a group of people prominent on social media: from influential businessmen, such as the owners of Havan and Riachuelo (both large chains of department stores) to a diverse circle of artists and public figures. In these last two circles, Bolsonaro has been losing support since early April 2020, aggravating a crisis whose effects are still difficult to measure. His grassroot basis operated on several foundations that were shaken by the pandemic: they operated on an anti-public policy logic that allows them to disassemble public policy structures in the Ministries of Education and Environment. In addition to that *Bolsonarismo* was in a political dispute with public universities in which a sharp critique of science was a key part of the discourse in the Ministries of Education and Environment. *Bolsonarismo* is situated in an anti-scientific field that is more pronounced than Trumpism and other far-right political proposals (Mede and Schaffer 2020). Thus, supporting the Ministry of Health policy against the coronavirus would mean breaking with these key tenets of *Bolsonarismo*. This is what unleashed the president's denialism. His preference to strengthen a grassroot basis thriving on anti-science and anti-politics prevailed over organizing an anti-pandemic policy.

Yet, Bolsonaro soon had to face an alliance between the press, scientists, governors, and international organizations such as the WHO. Contrary to what had been happening in Brazil since 2018, this coalition became hegemonic during the pandemic (INCT 2020). Due to the way in which the then-Minister of Health, Luiz Henrique Mandetta, worked with governors and implemented the strategy

to combat the virus recommended by the WHO, *Bolsonarismo* appeared to be split from the first moment of the crisis.

The response of the president was to radicalize negationism. As a result of the strategy of radicalizing his position, Bolsonaro entered into a collision course with the governors, the STF, the Minister of Health and a significant part of his ministry. For the first time since 2018, however, he failed to make his conception of anti–politics hegemonic. Faced with the failure, he decided to double down on his bet: he started to radicalize it, turning it into an antilife public strategy. This strategy involved going to the demonstrations against Congress and the STF on March 15, 2020, visiting small merchants in satellite cities of Brasilia on March 29, going around Brasília during Holy Week and riding a jet ski on the day the country registered the mark of 10,000 deaths from the virus. In fact, Bolsonaro participated in more than one gathering a week from March 15 to mid-May, when Brazil already had 20,000 deaths from COVID-19. The president's attitudes made the permanence of the Minister of Health, Luiz Henrique Mandetta, unsustainable. But his dismissal on April 16 was just the beginning of a crisis that was only to deepen in 2021.

The levels of support for the president only started to decrease in early 2021, as he invested against vaccination of the Brazilian population. Vaccination in Brazil was an initiative of the governor of São Paulo, João Dória, after the federal government turned down an offer by Pfizer of 70 million doses by the middle of 2020 (Schreiber 2021). Bolsonaro attacked the initiative and the vaccine and disorganized the vaccination to such a level that placed Brazil behind vaccination in Europe and the United States, at the same time that a strong second wave hit the states of the Northern region of the country. Figure 13.3 shows the increase in number of deaths and decrease in Bolsonaro's approval rate in early 2022.

The Crisis of *Bolsonarismo* as a Form of Government

Bolsonarismo is an anti–politics movement that made an attempt to transform anti–politics into a form of government. It is possible to state that as form of government *Bolsonarismo* failed abjectly. Figure 13.3 is very clear in showing that the correlation between negative government evaluation and the accumulated number of deaths by COVID-19 is very tight. As the death toll rose, dissatisfaction with the Bolsonaro government mounted. It is as if the population could now see the dramatic impact in loss of lives caused by Bolsonaro's denialist behavior. Indeed, he attempted to change his rhetoric, especially after more ideologically moderate and renowned clientelist parties from the ideological center joined his coalition. But it may have been too late. Certainly, this dissatisfaction has been reflected in a loss of popularity and, potentially, loss of votes in 2022, something we explore in more detail below.

Yet, *Bolsonarismo* has not been defeated as a conservative and antidemocratic movement. Two facts explain its resilience. The first one is a conspiracy conception
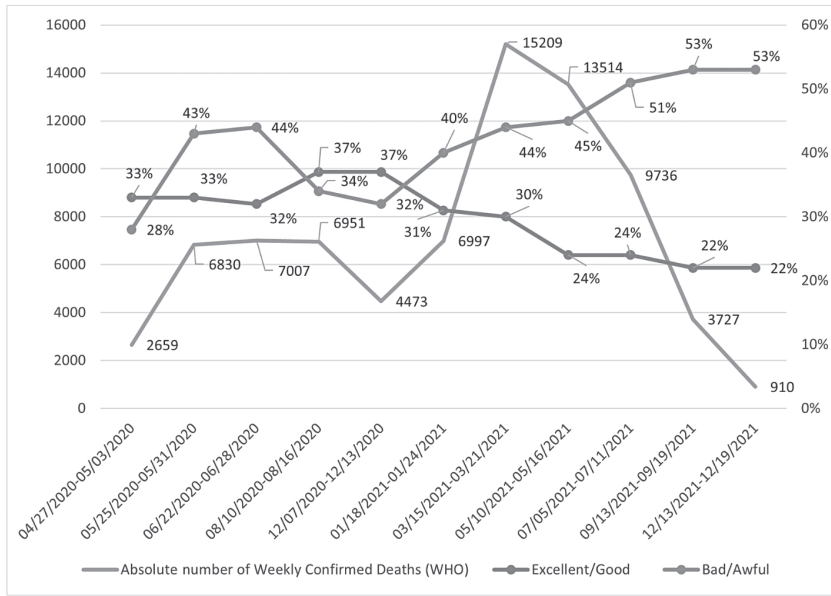
FIGURE 13.3 Government Evaluation and Weekly Deaths by COVID-19

that is very widespread in Brazil since 2018 and achieved its height during the pandemic when *Bolsonarismo* spread fake news about deaths and the coronavirus, as Figure 13.4 shows. Brazilians were open to manipulative discourse about the pandemic, manipulative pseudo-scientific discourse, and to narratives blaming China and many other actors for the crisis. At this level, as we will show below, *Bolsonarismo* was successful in reassuring its grassroots base.

Thus, despite the sharp slide in Bolsonaro's approval rates in 2021, *Bolsonarismo* as a movement continued to do well. Bolsonaro galvanized a group of conservative supporters that expresses itself in social networks and makes viable a conservative right–wing movement. Figure 13.5 shows an important growth in the number of Brazilians who position themselves as right-wing: it went from to slightly more than 20% to almost 40% between 2018 and 2021. At the same time, support for the left remained almost the same during the three–year period. Bolsonaro governed to strengthen his base of support; he did not govern to convert or activate more voters. Our data show that his controversial, to say the least, management of the pandemic ostracized significant portions of the electorate. These voters are very unlikely to return to him. But his core supporters – the true believers who share several issue positions following Bolsonaro's lead – have grown more consistent and aligned over time. In spite of all criticism and conflict – or maybe because of both – *Bolsonaristas* have remained faithful and loyal to their leader.
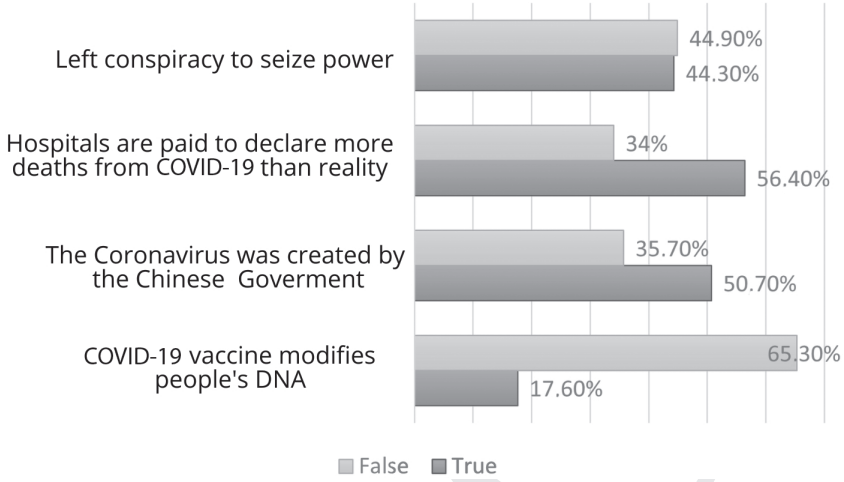
FIGURE 13.4 Conspiracy Views on the Pandemic in Brazil
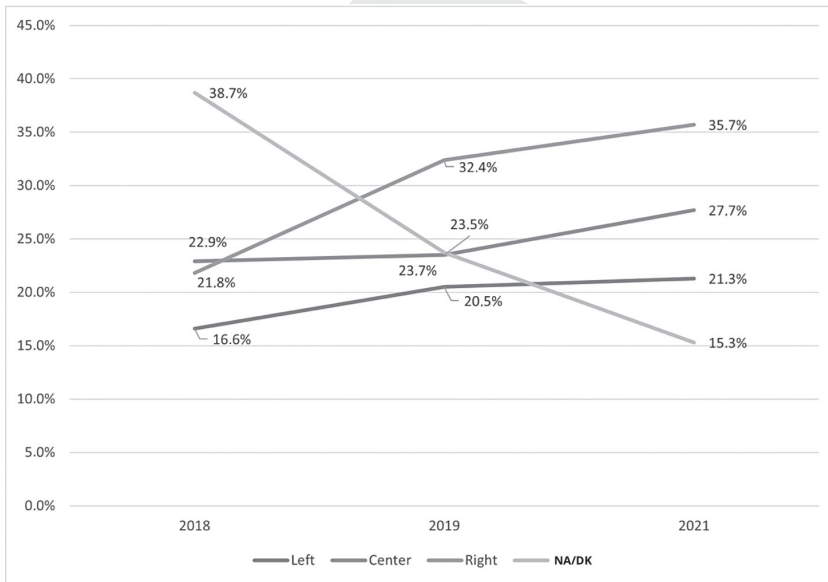
FIGURE 13.5 Ideological Self–Position of Brazilian Public Opinion

Since 2018 conservative opinions are predominant in Brazilian society and have increased over time in some cases. Positions against legal abortion are almost consensual in Brazil. The militarization of schools and the teaching of religion in schools are supported by a massive majority of the population. Gay issues divide

the population with significant contrary positions. Mano dura or hardline and violent approaches to combating crime prevail. The Brazilian population became conservative, and a significant portion of this electorate has flocked to *Bolsonarismo*. In the face of a choice between Bolsonaro and a more progressive candidate, despite Bolsonaro's failures in government and in confronting the pandemic, these voters will be hard-pressed to make their electoral pick. The 2022 elections will again pose dilemmas to voters, which will face ambivalent incentives to support Bolsonaro. A hypothesis to be tested is if ideology – issue positions – and resentment against a least desired option play a more significant role than retrospective evaluations of the economy or government performance in determining vote choice. This will only become clear after the 2022 elections.

Right-Wing Populism after the Pandemic

Populism has two dimensions: the first one is a political proposal to deny the importance of mediating institutions such as parties and the media and impose the complete sovereignty of the political leader (Peruzzotti 2020). The second one is a public opinion dimension that allows the populist leader to gather and to concentrate power in his own hands. In this chapter, we tried to associate both dimensions through a supply and demand conception of populism. According to this approach, there is a demand for populist policies that allows *Bolsonarismo* to have a competitive proposal that incorporates those who believe in conspiracy, neo-Pentecostals, white men of the Southern region of Brazil, and those who saw their status or economic condition deteriorating.

What we have shown in this chapter is that at the level of public opinion most Brazilians disagreed with Bolsonaro's policies during the pandemic. Most of the public did not support the then president. Bolsonaro took strong positions and set some of the main issues of the public debate, namely criticism of the health system; power centralization against state and local administrations; denialism of the effects of the pandemic; long-term defense of innocuous treatments; the challenge to social distancing and the challenge to vaccines. Those positions seem to be defended by a minority of Brazilians, but the data show that those who do defend them also fervently adopt *Bolsonarista* positions and coherently align with *negationism* and would prefer the federal government to centralize policy – in this group, the demand and supply sides of populism align.

Another question raised by this chapter is how such positions affect government evaluation and here we draw on the differentiation we established between *Bolsonarismo* as a form of government and *Bolsonarismo* as a movement. As a form of government, the data show that government evaluation was not affected by any specific socioeconomic characteristic, strongly suggesting that government support cuts across social groups. However, the most striking result regards those who had short-term upward mobility. This is possibly the part of the population that benefited from the short-term economic incentives given by the Bolsonaro

administration during the pandemic – the very encompassing *auxílio emergencial*. These voters who had upward mobility in the period are the ones who positively evaluate the federal government at a rate four times higher than other Brazilians and kept Bolsonaro's administration evaluation stable throughout 2020. Bolsonaro's administration was kept stable during 2020, to a great extant, due to the support of this group of voters.

We showed that it took a second wave of COVID-19 in early 2021 to move Bolsonaro's evaluation downward. As the year began and a second wave of COVID-19 devastated the Northern region, the Bolsonaro administration's inability to handle basic things such as the oxygen supply in the Amazon region started to change public opinion about his administration. As vaccination programs were initiated in many countries and Brazil lagged behind due to the president's attacks on vaccinations and a rejection of a Pfizer offer of 70 million doses, Bolsonaro's positive evaluation slumped below the 20% mark (Schreiber 2021). Yet Bolsonaro's handling of the pandemic continued to receive positive evaluations from those who were benefiting from short-term economic gains, who also favored the concentration of power in the federal government and the sidelining of classic check and balance institutions.

This may suggest that although Bolsonaro's positions are not shared by a majority of the population, they are supported by a coherent group of voters, many of whom felt a recent surge of upward mobility. This points, once again, to the economic features of the demand side of populism. Finally, our data show that Bolsonaro's negationist positions had not changed the previous polarization scenario, as ideological differences (expressed in support for Lula against Bolsonaro) remain relevant. This signals that the pandemic does not necessarily alter the global trend toward political polarization and populist politics, rather entrenching tendencies than proving direct reorganization patterns at least in the short run – we will need, however, longer time periods in order to perceive other possible changes in the scenario.

Denialism and challenging social distancing showed a path of reorganization of the unlikely coalition that brought Bolsonaro to power. Though market forces and the middle class distanced themselves from *Bolsonarismo* due to the president's position on the pandemic, another path for building a populist coalition opened up. This is a path that brings together the demand side of populism with its denial of checks and balance institutions and its pursuit of power centralization. *Bolsonarismo* as a movement can still organize large sections of the Brazilian population such as neo-Pentecostals, those with recent social mobility, and white men with lower education levels in the Southern region. Those sectors constitute a political grassroot basis for *Bolsonarismo* as a movement and the disastrous pandemic performance did not seem to have an effect on these sectors. Thus, the handling of the pandemic defeated *Bolsonarismo* as a form of government but did not seem to affect *Bolsonarismo* as a movement or the demand for right-wing populism.

The post-pandemic and post-electoral horizon in Brazil may be a mix of the failure of *Bolsonarismo* as a form of government and the capacity of *Bolsonarismo* as a movement to continue to destabilize the political system. Independently from the election results *Bolsonarismo* as a movement is here to stay and will retain a certain capacity to destabilize the political system. The pandemic in Brazil reorganized both populism and the dynamics of the crisis of democracy without pointing out a new path for the reorganization of the democratic forces. The crisis of democracy in Brazil will continue as long as there is demand for right-wing populism and a grassroot movement is in place to challenge politicians, the political system, and the organization of public policies.

Notes

1 A few parts of this chapter have been previously presented in our jointly authored article in the Revista Brasileira de Ciência Política. See Avritzer, Rennó, and de Carvalho (2021).
2 The Christmas pardon was introduced by the 1988 Constitution through Article 84. It is an exclusive and arbitrary prerogative of the Brazilian president. Its nullification by the Brazilian Supreme Court in 2017 during Michel Temer presidency was demanded by Lava Jato because it applied to 12 conviction; 150,000 people have their freedom affected by the Supreme Court decision.
3 Instituto da Democracia is a joint project by Political Science Research Centers at the Federal Universities of Minas Gerais (UFMG), Rio de Janeiro (IESP/UERJ) and Brasília (UnB), and the State University of Campinas, SP (Unicamp), among other institutions.
4 The Instituto da Democracia's survey was applied in a sample of 2,500 interviewees between March 15 and 23, 2018. The sample was representative of the whole countries' population with 2% error margin and 95% confidence level.
5 Jair Bolsonaro himself announced on February 15, 2019 a new Lava Jato focused on higher education. Sérgio Moro had one meeting with the first Minister of Education Ricardo Velez Rodriguez to discuss the details of the operation, but it was called off in November of the same year. See Terra November 5, 2019.

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14

FOUR-SQUARED DENIALISM

The Uses of Fake News for the Political Construction of Identity in Bolsonaro's Populist Government during the Pandemic

*Vinícius de Souza Sturari and
Rodrigo Otávio Moretti-Pires*

Introduction

Brexit and Donald Trump's election in the United States marked 2016. "It is these events that underpinned the latest wave of interest in populism and led to the suggestion that 2016 be regarded as the year populism [in which] 'exploded'" (Tormey 2019, 1). Because of these events, the Oxford Dictionary chose post–truth as the word of the year.

We analyze here only a few characteristics of contemporary populism, which differs from previous historical forms with different singularities (Zuin 2021), both because we do not intend to have a theoretical debate about the concept and because we understand that an entire chapter or paper could be devoted to this.

Within the populism in Brazil, the employment of fake news by President Jair Bolsonaro (2019–2022) and his supporters is one of the hallmarks of his government since the 2018 election campaign. Our argument in this chapter is that Bolsonaro disseminated fake news to create an identitarian bond with his supporters and that this exacerbated the pandemic in the country.

The Populism Virus

Donald Trump and Jair Bolsonaro are just two representatives of a larger class of politicians and leaders who follow the populist agenda. Levitsky and Ziblatt (2018, 33–34) point to the dangers that populists pose to democracy, listing four indicators of authoritarian behavior, namely: (1) rejection of or weak commitment to democratic rules of the game; (2) denial of the legitimacy of political opponents; (3) toleration or encouragement of violence; and (4) readiness to curtail the civil liberties of opponents, including the media.

Both presidents, as well as other populists such as Viktor Orbán, the Prime Minister of Hungary, have characteristics of these four indicators. Mounk (2019), in the preface to the Brazilian edition of his book *The People vs. Democracy*, states that in the Brazilian electoral campaign Bolsonaro was very similar to that of Trump and Orbán. He painted himself as a unique representative of the people, said that his opponents were traitors, and attacked norms and institutions, even pushing for the return of the military dictatorship in Brazil. Bolsonaro inherited an authoritarian identity formed in Brazil during colonial times (Schwarcz 2019) – thus, his authoritarian agenda is not new. It just gained a new form.

Continuing with the populist agenda, Zuin (2021, 148) analyzes the "aesthetic and political manifestations contained in the digital political communication carried out by Matteo Salvini", a populist leader of the Italian party Lega, and divides them into three categories, which can easily also be found in Bolsonaro's behavior, which are (1) simplified, concise and emotional political language; (2) aggressive words and creation of the figure of the enemy; and (3) the politics of fear. Regarding these characteristics, we must pay attention to how populism uses emotions and creates strategies to activate them (Cabanas and Illouz 2019). Among these strategies, we highlight fake news, the operationalization of post-truth, defined as an adjective in the Oxford dictionary as "relating to or denoting circumstances in which objective facts are less influential in shaping public opinion than appeals to emotion and personal belief" (Oxford Word of the Year 2016).

Although fake news is not a new phenomenon, it has gained strength in recent years due to the internet, mainly from Web 2.0, when users start to have the freedom to create content, share and communicate with other users, in a bidirectional communication – different from the previous form of unidirectional communication, when it comes only from established companies and media (Van Djick 2016). Regarding the difficulty the media faces when losing space for bidirectional communication, D'Ancona (2018, 55) says: "in the consequent cacophony, the flow of information is increasingly dominated by peer-to-peer interaction".

This is where fake news finds effectiveness: when citizens are no longer just passive consumers but become active managers of political information (Loveless 2021). As Schwarz and Jalbert (2021) demonstrate when analyzing the reasons for the acceptance of fake news as truth, they argue that in our daily conversations we assume that our interlocutor presents relevant, true, informative, and clear contributions, only doubting them if we doubt that the speaker observes these rules. Our communications are mediated by our feelings and beliefs, a struggle between reason and emotions, and that is why social media connects us in a much more effective way than traditional media (Galup 2019). For these and other reasons, such as the activation of certain feelings, fake news is used as an emotional weapon (Loveless 2021) and is part of populists' strategies.

The Virus and Populism

On March 11, 2020, the World Health Organization (WHO) changed the status of the international emergency related to the SARS-COV-2 virus, which causes the COVID-19 disease, and labeled it a pandemic. In this context, both in Brazil and in the world, several interest groups promoted a war of narratives – already in place since the first cases between December 2019 and January 2020 – with speeches that antagonize science and engage in denialism, in political disputes between the global far-right and other political orientations. As the world waged a war against the coronavirus pandemic, Bolsonaro prepared the terrain for another war of narratives.

Bolsonaro's 2018 presidential campaign is still the subject of legal investigations due to the employment of fake news. He and his supporters used this tactic in their battle against the WHO and science, making a false dichotomy between saving the economy and saving lives. This political group uses the same discursive repertoires against the Brazilian government led by ex-President Dilma Rousseff (2011–2016), of the Worker's Party (PT or *Partido dos Trabalhadores*), as well as in the 2018 presidential campaign, alleging a battle against a communist dictatorship, the return of the left, science and researchers, and multilateral organizations such the WHO.

Populist governments are responsible for the worst responses to contain the pandemic (McKee et al. 2020). The authors say that, at the time they wrote the paper, in June 2020, "the United States, Brazil, Russia, India, and the United Kingdom occupied, in that order, the top five positions ranked by numbers of COVID-19 cases in the Johns Hopkins dashboard" (McKee et al. 2020, 511). Together, they accounted for 51% of cases worldwide and only 27% of the global population. Almost a year later the results were not very different. The Bolsonaro's pandemic administration turned Brazil into a laboratory for the development of the disease in the Global South (Ventura and Martins 2020).

McKee et al. (2020) list four mechanisms populists used that contributed to the outcome of the pandemic. The first is blaming outsiders and victims: appealing to groups that have been left behind and putting the blame on someone else (immigrants, the Chinese government, the communists, etc.). Then there comes the strong leader (the populist) who can save the people. According to the authors, this strategy worked because even if the leader fails to deliver what was promised, the blame is on elites and other actors for not letting the leader take action. The second mechanism is contempt for institutions: policies adopted influence the course of the disease. Populists wage a war against institutions that have elite representatives. For example, Bolsonaro verbally attacked the Federal Supreme Court's decision to allow states and municipalities to take measures to control the pandemic, such as adopting lockdowns, and imposing the use of masks, among other restrictions.[1] The third instrument is denialism: populists reject science and ignore the consequences of COVID-19, as when Bolsonaro said that the disease

was a "little flu". The fourth mechanism is suspicion of the elites: populists consider the media as representatives of the elite who are trying to harm their governments. Bolsonaro attacked the Brazilian media daily, claiming that they have created "hysteria" about the virus to undermine his government.

Among these mechanisms, we highlight the third. On February 15, 2020, at the Munich Security Conference, Tedros Adhanom Ghebreyesus, Director-General of the WHO, in addition to warning about the possible arrival of the virus in several countries and asking for the efforts of the global community in accelerating research and ways to oppose the pandemic said: "We're not just fighting an epidemic; we're fighting an infodemic. Fake news spreads faster and more easily than this virus, and is just as dangerous" (Ghebreyesus 2018). With so many stories and information about the disease and the virus, it is difficult to differentiate between what is true from what is false. On the dangers that fake news about the disease can cause: "Inaccurate information does not only mislead people, but it can [also] endanger lives by encouraging people to ignore public health advice, take unproven drugs, or refuse a vaccine, should one become available" (Hazelton 2021, 93). Bolsonaro and Trump released several types of fake news and conspiracy theories about COVID-19, such as one that says that the virus was created in a Chinese laboratory.[2]

Cities in which Bolsonaro had the highest percentage of votes in the 2018 presidential election, and which were, therefore, more aligned with the president's rhetoric, are those where there was less social distancing and consequently a larger number of cases and deaths, so "political and electoral support for Bolsonaro has a direct correlation with mortality: more votes, fewer lives" (Rache et al. 2021). This information tends to confirm our argument that there is a strong identity issue behind the president's speech. A study published by Aruguete and Calvo (2020) reinforces this point, demonstrating that, in Argentina, supporters of Alberto Fernandez had a better perception of the risk of the disease than Mauricio Macri's, who made the same dichotomy between saving the economy and saving lives, as did Bolsonaro.

Populism and fake news are what we can call a successful partnership. Trump's (2016 and 2020) and Bolsonaro's (2018 and 2022) campaigns employed many of these strategies, as did these leaders during their governments. Another important aspect of populism is the creation of identity between the leader and the supporters. Bolsonaro used fake news for this purpose in his management of the COVID-19 pandemic. To understand this identity we use some contributions from Butler.

The political group that took over the Brazilian government in 2019 steeled itself against political and democratic dialogue. It was built on an antagonistic identity against the so-called old policy, the center-right and the left wing; the far-right attacked the latter to discredit conventional politics, the traditional media, and institutions of higher education. This four-squared identity takes on more and more specific outlines in Brazilian populist denialism. During the period that

followed the beginning of the pandemic, this four-squared identity traced a dis-
cursive framework about both the actions of the government and its supporters, as
well as the tension with opponents, an important element for the constitution of
the group's identity, as defended by Butler (2009).

It is important to argue that there is something specific in the Brazilian context,
in which the president finds two groups of supporters: (1) a portion of the popula-
tion that, for various reasons, does not admit or even give importance to the health
situation as the scientific authorities in the field does and (2) Trump's speech.

Regarding the denialists, it is important to recall that two decades ago there
was an increase in the conservative wave in the world, with far-right governments
that repeatedly yielded to the weakening of individual rights and freedoms. This
situation has been intensifying since the September 11, 2001 attack, which led to
a certain war-like and violent response on the part of the United States against the
aggressors in a reactionary panorama that characterizes the democratic dialogue as
terrorism and with a broad expansion of criticism to the progressive perspectives
that defend human rights throughout the world – according to the analysis of
Judith Butler (2009).

Looking at this new reality, Butler made a sophisticated argument and its most
prominent point is the concept that those considered to be human and liable to
mourning (and those who are not) are at the analytical center of contemporary
political issues since vulnerability is a characteristic of life while the responses to it
are of political and sociological character (Butler 2009). For the author, the human
issue refers to power differentials and their differential recognition insofar as:

> […] "the human" works like a differential rule: let us think of the human as
> a value and a morphology that can be attributed and removed, praised, per-
> sonified, degraded and denied, elevated and affirmed. The norm continues
> to produce the almost impossible paradox of a human who is not human,
> or of the human who erases the human as a known otherness. If there is the
> human, there is the inhuman; when we proclaim as human a certain group
> of beings that were not previously considered actually human, we admit that
> the claim of the "condition of humanity" is a changeable prerogative. Some
> humans consider their condition of humanity to be natural, while others
> struggle to ensure access to it. The term "human" is constantly duplicated,
> exposing the ideality and the coercive character of the norm: some humans
> can be qualified as humans; others cannot.
>
> *Butler 2015, 117*

In a clear dialogue with the Theory of Recognition (theorists in this tradition
range from Hegel to Honneth), Butler sees that the identity issue and the radical
perspectives of self-sufficiency and unrestricted sovereignty are narratives made
in the construction of a certain nationalism that builds different enemies for their

own existence in the field of politics, including in these "discursive adversaries" the global and broader processes of which all world communities take part contemporarily. The impossibility of total control over oneself and others weaves a fantasy in which violence is sustained in response to enemies constructed in the discourses and forms of intelligibility of the identity groups. Hence, the issue is one of recognizing dependency and vulnerability as characteristics of the constitutive relationship between the person and others, according to Butler (2009). The violent response does not recognize dependency and vulnerability. On the contrary, it incites more dependency and more vulnerability in Butler's conceptualization.

From another perspective, Byung-Chul Han (2019) points out that the communication revolutions arising from the spread of the internet and social media promoted a disintegration of the community horizon, with the disappearance of contexts that guarantee meaning and identity in daily life, as well as a certain fabric of temporality. For him: "Fragmentation, punctualization, and pluralization are symptoms of the present. (...) A punctual time or an event-time arises that cannot make much sense due to its lack of a horizon" (Han 2019, 93). As a result, the experiences of interactions are dispersed in the hyperspace of possibilities and events on the internet, constituting a true constellation of dispersed events, with consequent painful emptiness resulting from the lack of a human horizon, leading to "a narrative crisis" (Han 2019, 94).

The infinite possibilities of opening "countless windows" of access to information in social media and the hyper textuality of internet platforms fragment consciousness and generate the loss of community continuity which establishes the "[...] possibility of an individual narration, of an individual project of existence" (Han 2019, 94), with a greater appearance of disconnection from others and "[...] no horizon of universal, common experience, no relationship rules that have universal validity" (Han 2019, 119) and that bring the experience that the determination of each individual in this relationship refers to the whole, and thus the opportunity of new and different perspectives on the same events in society are lost. From Han's perspective (2019), the media do not manipulate the individual, but become an orbit of indirect influence, as they constitute themselves as a diffuse and dispersed space, not commanded by a determined agent or institution. However, the author warns that the internet is a multilateral space, with a radical increase in contingency.

In this sense, the internet's interaction platforms produce a certain information "bubble" effect (due to its mechanism of availability of elements), which tends to reinforce identity patterns and not bring other perspectives to the subjects, creating the illusion that the world seen in social media is the offline social reality itself (Finn 2017). Han (2019) alerts that: "regarding the logic of power, there is no essential difference between territorial and digital location. Those who conquer or dominate the digital space have power here" (Han 2019, 174–175).

Bolsonaro's Four-Squared Denialism

Despite the various approaches to populism in the world, based on the Brazilian case, we intend to analyze the identity frameworks used by the far-right groups that constitute Bolsonaro's political base. During 2020, we collected several fake news that circulated in WhatsApp groups and arrived to the conclusion that that they have a central discursive nucleus, which moves and adapts to what it aims to defend. We categorized their meanings and divided them into what we call four-squared denialism. The four elements of four-squared denialism are described below.

Element 1 – An Attack on Institutions – Anti-Democratic Acts as an Instrument of Disbelief in Politics and Its Institutions

As an effect of the antidemocratic movements that largely supported the victorious speech in the 2018 elections that brought Jair Bolsonaro to power, the questioning of Brazilian political institutions is at the foundation of why the president-led group is the only possibility for the "renewal of Brazil" within the identity construction of the Brazilian far-right denialism. Hence its analysis as the first face of the four-squared denialism since this is the broadest discursive repertoire, involving the political system, its institutions, and its functioning, in the constant idea of this group that "there is something wrong". Within this perspective, Bolsonaro is constantly criticized because he goes against the "old politics" and the vested interests that benefited from them.

There is an interesting discursive strategy employed since the beginning of the COVID-19 pandemic, operated by the Bolsonaro government, aiming to dissociate the consequences of the health emergency from the actions of the Brazilian Executive and delegating responsibility for all failures to other political players. On March 9, 2020, when only 25 reported cases had accumulated and there were no deaths due to COVID-19, Jair Bolsonaro declared to the press that political opponents would be overestimating the disease, probably for economic reasons. Just over a month later, on April 20, 2020, the country recorded more than 40,000 cases and 2,000 deaths when Bolsonaro replied "I am not a gravedigger, okay?" (Brum 2021).[3] When asked about the pandemic, a week later, with 72,149 cases accumulated and 5,050 deaths, the Brazilian President replied to journalists "So what? What do you want me to do?" (BBC News Brasil 2020).[4]

The discursive tension used at the time referred to the idea of exaggeration on the part of other political groups in the arena. With the growing demand from both opponents and the population in general, mayors and governors began to adopt several measures of social distancing and mandatory mask-wearing, and in some cases lockdowns, which served as fuel to consolidate the denialist's group position that these instances and spheres of government antagonized the president, as shown by Mechanism 2 at McKee et al. (2020). Deciding on the constitutional

jurisdiction for measures related to sanitary emergencies, the Brazilian Supreme Court declared that all federal entities were also allowed to take actions and measures to prevent, control, and combat the pandemic. Employing disinformation and fake news, the group of denialists associated with Jair Bolsonaro launched a campaign against democratic institutions, including the Brazilian National Congress and the Supreme Court, with cyber demonstrations, but also mobilizations and street protests in large cities and the federal capital, Brasília, some culminating in symbolic and physical aggressions. The demands of these protestors included a return to a military dictatorship and an end to restrictions of the autonomy of President Bolsonaro. The idea was that if there was a problem in the country, it lay with the institutions that could curb the impulses of the executive branch and that the president, as the leader of the executive branch, should have the power to continue to deny the seriousness of the pandemic.

The effect of this speech used in the construction of *Bolsonarista* denialism was worth viral posts and messages on social media, with the central idea as follows: "Just to remember: the Supreme Court removed Bolsonaro from COVID's control by giving this power to Governors and Mayors. Don't demand it from the President" (Pacheco 2021),[5] which was still massively employed in January 2021. Other common posts at the time were "My dream would be to wake up early tomorrow and with the news: the army has just invaded the Supreme Court". In other respects, the hashtags #UcranizaBrasil (neologism Ukranize Brazil)[6] and #NaoVoteiNoSTF (I didn't vote for the Supreme Court) are examples of what *Bolsonarista* denialists started to use in their posts, as well as an identity mark especially in posts supporting the government and against everything and everyone who did not align with it in their actions during the pandemic.

Element 2 – Attack the Traditional Press and Use Freedom of Expression and Distortions of the Term for Hate Politics, with the Parallel Networks of Fake News

Another important element in the identity construction of *Bolsonarista* denialism refers to the systematic attack on the media and the attempt to curtail freedoms of expression, especially those critics of the government and its management of the pandemic. At various times, Jair Bolsonaro claimed that the press created "hysteria" about the pandemic and promoted panic about the disease, which, he said, would be why people are suffering from the health emergency.

Bolsonaro and his supporters argued that productive activity was also being hampered by the press's insistence on "exaggeration" regarding the reality of the evolution of the pandemic. As an argument, they employed a logical inversion in the use of vital statistics, stating that there was a focus on deaths and cases, and not on the cured. At the beginning of the pandemic, when research institutes such as John Hopkins (USA) and Imperial College (UK) estimated thousands of deaths and the Brazilian press announced the predictions, there was a systematic

questioning of these elements as an "absurd" discourse, with several sectors sup-
portive of the president declaring that there would be no more than a slight
increase in some deaths. One example was a *Bolsonarista* businessman who used
social media to argue that the partial closure of commerce, which was identified in
the press as an important decision to halt the progression of the pandemic, would
have "larger consequences" than the "5 or 7 thousand people who could have
died because of the coronavirus", compared to the number of unemployed that
there would be if the sanitary measures defended in the press were adopted. On
social media, *Bolsonarista* digital militias used this and other statements to defend
the thesis that there would be an intentional use of the panic–spreading press to
"sabotage" the Bolsonaro government.

Despite the confirmation of most of the predictions released in the press about
the pandemic, there is a systematic denial of this important source of criticism of the
government, and even after a year of the pandemic that occurred in Brazil and the
world, Bolsonaro still declared on January 5, 2021 "Brazil is broken, boss. I can't do
anything. There is this virus spread by the media that we have here. This dishonest
media that we have. Turn someone over to serve the media's shady interests" (Mazui
2021).[7] The next day, he told supporters that the press is the biggest problem in
Brazil and that "I can solve the virus problem in a few minutes. Just pay what
governments paid in the past to Globo, to Folha, Estado de S. Paulo" (three of
Brazil's most important newspapers) (Brito 2021), mobilizing the discourse that the
pandemic was a fiction of the media. In December 2020, he declared that fatal cases
of healthy people under the age of 40 were rare, and that most people who tested
positive would have no symptoms. In February 2021, Bolsonaro again attacked the
press and suggested taking newspapers out of circulation, with a certain discursive
inversion that "They are fake news factories. Now let the people free themselves
because they have freedom" (Della Coletta and Machado 2021).[8]

Many of the posts that attack the press and reports critical of the government
are built using the hashtags #FechadoComBolsonaro (I Stand with Bolsonaro),
#MitoVoceNaoEstaSozinho (Myth You Are Not Alone – one of Bolsonaro's
nicknames is "the Myth"), and #BolsonaroReeleito (Bolsonaro Reelected). Even
with the historical trajectory of tension between the media and the left–wing
governments in Brazil, several posts made use of speeches similar to "This you
don't not see in #Globo, #CNN, #Band [three of Brazil's major television news
networks] and in any other leftist media" for presidential achievements, building
the idea that the press limited coverage of the good things the government did
during the pandemic, and exaggerated failures and gaps in policy.

Element 3 – Attack Brazil's Largest Commercial Partner as Part of the Fight against "Globalism"

The third element of *Bolsonarista* denialism refers to a discursive grouping that
includes the defense of the minimal state, anti–globalism, and strong conservatism.

The pandemic emergency and its beginning in Wuhan (China) is a central nucleus in the identity discourse, in which several explanations have been built that supposedly reveal why the pandemic resulted in economic gain for the Chinese communist government and world domination by enemies of capitalism. It should be noted that in October 2018, Bolsonaro's campaign speech made headlines worldwide, when he said that "China is buying Brazil" (Senra 2019).

The expectation of economic upheavals in the face of a global paralysis due to the pandemic became a fertile stage for the most diverse manifestations not only by Jair Bolsonaro but by his sons (two of whom are Congressmen) attacking China, blaming the Chinese for the pandemic. In clear alignment with Donald Trump's speech in this regard, on several occasions, ministers and government officials used the term "Chinese virus", with some more prominent episodes such as the crisis that Congressman Eduardo Bolsonaro, President of the Foreign Affairs Committee of the lower house of the Brazilian Congress, on the occasion of a social media Twitter post, in which the Congressman compared China's attitude toward the new coronavirus with the attitude of the former Soviet Union after the accident at the Chernobyl plant. The Congressman said: "Once again a dictatorship preferred to hide something serious rather than exposing it with wear and tear, but that would save countless lives. China is to blame and freedom is the solution" (Bolsoraro 2016).[9] In addition, Brazilian Foreign Minister Ernesto Araújo published on his personal blog a paper entitled "The communavirus has arrived", in which he blamed China in the following terms: "The Coronavirus makes us wake up once again to the communist nightmare. The Comunavirus has arrived" (FUNAG 2020).[10] The Chancellor also claimed that the World Health Organization is part of the strategy by "denationalizing" actions to combat the pandemic, related to the idea that everything is part of an orchestrated strategy for the "dismantling of freedom and livelihood" through the "destruction of jobs that allow the dignified and minimally autonomous survival of millions and millions of people" (FUNAG 2020).[11]

It is important to note that China became Brazil's largest commercial partner in 2009 and is now the largest consumer of products and commodities from Brazil, with most industrial goods produced in the country also dependent on this commercial relationship. According to the narrative woven by the denialists associated with the Bolsonaro government, the economic crisis resulting from the pandemic is part of a strategy to devalue national capitalist economies and boost the economic power of communist China. The repercussions among the deniers had different tones, but they can be well illustrated by the following post and hashtags: "@SenadoFederal is the biggest marketer of #china in Brazil, they gave up their dignity and honor to serve the communist devil for money and power. #ChinaGenocida (Genocidal China) #COMUNAVIRUS (Communavirus) #senado (Senate) # Bolsonaro2022".

In this type of argument, Bolsonaro is the politician who antagonizes others and this is the path to economic salvation, as well as to a moral and democratic

polity. The pandemic becomes an anti-Bolsonarista mechanism and, to a certain extent, China itself is rival to Bolsonaro, with a certain idea that the left-wing parties would be aligned with the East Asian country. The perception of the left in this perspective encompasses the center and right-wing parties that do not align themselves with the President of the Brazilian Republic. In this view, the return of the military dictatorship would revive the political system, remove Brazil from the clutches of China, and make the liberal economy prosper in Brazil.

Element 4 – Anti-Science

Of all the elements of four-squared denialism, the position that is strongly opposed to science is, perhaps, the most frightening. The COVID-19 pandemic was a health emergency in which 34,654,190 cases and 685,927 deaths were registered in Brazil by the end of September 2022.[12] This was the second-largest national death toll in the world, after the United States. COVID-19 was the leading cause of death of Brazilians in 2020, surpassing all other diseases and conditions. At the beginning of the disease, little was known about its behavior, or about the best preventive measures and the possibilities of clinical interventions in its various phases, both in Brazil and abroad.

As already mentioned, from the first moment when the COVID-19 appeared as an issue, there were systematic attacks from the ideological core of the government, including the President, China, the mainstream media, and the left. These narratives emphasized the risk to the economy of preventive health measures and the possibility of exaggerated reactions to the disease, which would be just an "ordinary flu". At the first signs related to the new disease, in the same perspective derived from explanations emanating particularly from Donald Trump, Jair Bolsonaro began a campaign of demanding accountability from China – a country governed by a Communist Party – for its role in the origin and growth of the pandemic. Flirtations with conspiracy theories were constant, including the version of the "laboratory-produced virus" to end capitalism, harm conservatives, and help the left wing to return to power.

On January 10, 2020, the Ministry of Health's Event Monitoring Committee was activated and a week later the first publication in the Epidemiological Bulletin about COVID-19 was published. Luiz Henrique Mandetta led the Ministry of Health at that time, taking actions in line with the general guidelines of the WHO, but with apparent discomfort. Mandetta's technical decisions rested uneasily with the President's speeches blaming the media and expressing denialism, revealing a tension between the Minister's scientific approach and the President's ideology.

The first identified case of coronavirus in Brazil was registered on January 26, 2020, in the state of São Paulo, when the Ministry of Health finally decreed a national emergency, one day after the Brazilian "Carnaval", an event in which thousands of Brazilians and foreigners participated, all over the country, even with the growing concern in the world about the new disease.

After this declaration of a national health emergency, the digital and denialist militias and supporters of the president demanded his action. Between late February and the first half of March 2020, President Bolsonaro made numerous speeches claiming that the panic spread by the media was because of the price of the dollar, that the health crisis was small, and the virus was a fantasy. The Minister of Health and public health officials distanced themselves from these statements, with a period of silence from the Ministry of Health during the pandemic, while the President of the Republic aired conspiracy theories concerning COVID-19.

Following these events, the Ministry of Health formalized authorization for states to decide on the circulation of people and the use of masks, in addition to the construction of various technical guidance materials on COVID-19, and the need for social distancing. With the increase in the number of cases and the stance of the Ministry of Health, the President and his supporters began to spread the idea that there was an ideological element in the Minister of Health's stance. For *Bolsonarista*s, Minister Mandetta started to become the "face of the enemy" and he was vilified in social media posts by the President's supporters. As a result of this pressure, there was a softening of the speech on the part of the minister. Mandetta was clearly intimidated by the political criticism to which he was subjected.

At the same time, responding to his supporters, Jair Bolsonaro used terms such as "not all of this" when reaffirming the point that there was an exaggeration on the part of scientific studies and the discussion of the disease in the media. In addition, he opposed the wearing of masks. The denialists organized several demonstrations in all state capitals in the period from March to April 2020, always with the participation of the president who, in addition to meeting and mingling with these protesters, reiterated the discourse that social isolation was bad for the health, that people should go to work, and that masks were ineffective or even made the disease worse. The president always disagreed with the declarations of the Minister of Health against the gathering of large groups of people and started to call the Minister's actions "hysteria", instructing his Chief of Staff to diminish the power of Minister Mandetta, who started to defend lockdowns.

With the rapid advance of the pandemic, the tension between the technical decisions of the Ministry of Health and the construction of an enemy on the part of the president's supporters, Jair Bolsonaro changed his speeches and began to say that this was a political war against him and that Mandetta was not an ally. The president's supporters spread this argument on the internet. Mandetta remained ambiguous, torn between technical and political rationalities.

The first denialist theory of how to deal with the crisis emerged: vertical lockdown, in which only the elderly and infirm would be in lockdown and the other people would continue their daily activities. In this discourse, COVID-19 would only kill the elderly. This hypothesis did not have any scientific support, but reflected an alleged common sense that COVID-19 only affected the elderly. In response, Minister Mandetta publicly asked Bolsonaro not to diminish the

seriousness of the pandemic and criticized vertical lockdown and the idea that most of the population should return to normal life. At the same time, the president expanded the number of his public tours and contacts with supporters.

The tensions between the Minister of Health and the President of the Republic became the most important field of political dispute. Jair Bolsonaro became a denialist hero in the eyes of his supporters. At the same time, forces on the right wing, in the center, and on the left wing began to walk closer together, constructing several counter-identarian initiatives, such as the "we are 70%"[13] and the "all for the vaccine", based on science and contrary to the denialist discourses.

At the same time, the Minister of Health, who was a doctor, increasingly embraced science, the president deployed other explanatory repertoires that were not "contaminated by left-wing ideologies". Since the beginning of his government, Jair Bolsonaro systematically attacked, underfunded, and tried to interfere in Brazilian universities and research centers. Scientific discourse and its explanations were interpreted by Bolsonaro and his supporters as forms of ideological indoctrination, with the thesis that higher education institutions are producers of distorted truths that benefit the left and attack the government.[14]

It is in this context that the most diverse theories appeared that supported the use of hydroxychloroquine and similar drugs in the prevention and combat of COVID-19. Certainly, in a certain period of the pandemic, there was a hypothesis about its effectiveness, but without any scientific evidence over time. On April 8, 2020, Bolsonaro announced the production of hydroxychloroquine, in a position that differed from the technical recommendations issued by the Ministry of Health. The use of chloroquine and hydroxychloroquine became a matter of identity among the few health professionals who supported the unproven use of this medication and among the general population. The narrative that it was a solution, both in the prevention and in the treatment of the disease, became more and more prominent among denialists, and any attempt at an academic discussion about its use was understood as a political act and a defense of the left wing.

As a result of Mandetta's position against the president, Bolsonaro fired him as his Health Minister on April 16, 2020. Mandetta's removal reinforced the characteristics of those who supported Jair Bolsonaro. To defend the use of hydroxychloroquine, to be against Luiz Henrique Mandetta, to be against the lockdown, and to be against the use of masks became identity characteristics in the Brazilian political game. The successor to Mandetta, Minister Nelson Teich, also a doctor, remained in office for only 28 days, resigning precisely because he did not agree with the president's approach to countering science, and especially for recommending the use of chloroquine and hydroxychloroquine as a treatment for COVID-19.

Furthermore, at that time a third approach to the pandemic arose, which was growing and could no longer be taken as an exaggeration given the rising number of critically ill patients and deaths: collective or herd immunity. According to the president and his supporters, only by becoming contaminated could people

create immunity and, thus, lockdown would be incorrect. This denialist thesis also supports the anti-vaccine movement among supporters of Jair Bolsonaro.

Some Final Considerations

If we had to trace an average type of supporter of Jair Bolsonaro's populism based on the four elements of four-squared denialism, the identity built is based on a contradictory discourse that advocates democracy so that Jair Bolsonaro can do whatever he wants as president through the systematic attack on democratic institutions, on critics, the media, everything related to China, and lockdowns, and through recommending the use of chloroquine and hydroxychloroquine in all phases of the disease. Bolsonaro's approach also opposed the use of vaccines and defended the greatest possible contamination of people to achieve collective immunity. Judith Butler argues that discursive frameworks that are related to the operations of power are "[…] the frames by which we apprehend or, in fact, we cannot apprehend the lives of others as lost or injured (susceptible to be lost or injured) [and] are politically saturated" (Butler 2015, 14).

As a result of this continuum between what has been and what is not recognized, there are gradual levels of intelligibility in the dynamic field in which "intelligibility schemes" operate in acts of knowledge and recognition, as defined by Butler (2015, 21):

> [...] the general historical scheme (or schemes) that establishes the domains of the knowable. [...] a life has to be intelligible as a life, it has to conform to certain conceptions of what life is, in order to become recognizable.

According to Butler (2015), intelligibility occurs as a "field of perceptible reality", in which processes of recognition of what is human are formed and reiterated in opposition "[...] to what cannot be named or seen as human, a representation of the non-human that negatively determines and potentially disturbs what is recognized as human" (Butler 2015, 100).

Not all life lost due to COVID-19 seems to be intelligible as human in the positions of the identity marks of the denialists who were at the head of the federal government in the period we analyzed in this chapter. And those who had different postures from the denialists were progressively transformed into enemies.

Butler (2015) points out that identities such as those of the denialists described here are not stable frameworks but a partial production doubly uncertain in ontological terms, since what escapes control, the framework itself, and displaces it, is part of the constitutive process between what it is outside and what is inside those same epistemic-discursive frames, in an idea possibly close to the discontinuities pointed out in both Foucault and Derrida.

In addition, there is a need for the frames to circulate and be reiterated among people, constituting what Butler (2015, 28) establishes as "[...] the

iterable structure of the framework", including in this the breaking up of old frameworks so that new ones circulate, a moment in which it is apprehended that other people were living in spite of not having been recognized as lives, shifting, moving, reproducing, and allowing a certain structure to remain even though always different.

In this context, it is the sense of community given by Butler, referring to the context of belonging because "[...] I am responsible only for those who, in some way, are similarly recognized to me" (Butler 2015, 61) and this implies a certain implicit political order that produces and reproduces both the framework and the intelligibility and, especially, the affections and the moral reactions to similarities and differences.

It is not a static process at all, and it is related to the analysis of lives that are recognized as worthy of protection and preservation and those which are not, or even constitute threats to the former, thus being less human, since what is mine is intelligible as a human being because it is part of a certain "we" arising from the frameworks and boundaries established by them.

People circulate images, recordings, and films, among other discursive forms (graphic, sound, narrative, among others), repositioning both coercion and control over the state. This reconfiguration of possibilities and impossibilities refers to the political dispute and the frameworks of intelligibility, based on what is and is not possible as a condition of appearance within the visual and sonic fields. It is in this sense that the relevance of identity construction is established for political interest groups. An interesting hypothesis to be considered from these considerations is that taking a conciliatory and pluralistic approach to Brazil as a nation could perhaps threaten a certain narrative coherence preferred by denialists and thus pose a problem for the maintenance of Jair Bolsonaro's power.

Notes

1 Prior to that decision, lockdowns could only be enforced though presidential decrees.
2 Concerning vaccines, its bases, movements in light of the Bolsonarista denialism context demand further study, which is being developed by the authors. There is a separate and complex chapter in the construction of the contemporary negationist identity of Bolsonarista populism.
3 "Não sou coveiro, tá?". This and all other translations of quotes in Portuguese were done by the authors of this chapter.
4 "E daí? Lamento. Quer que eu faça o quê?".
5 "Só Pra Lembrar! STF afastou o presidente do controle da Covid-19 e deu a governadores e prefeitos. Não cobrem do presidente".
6 The term "*ucranizar*" refers to the recent process of radicalization of the Ukrainian extreme right and the democratic rupture, with the use of the flag of that country in the demonstrations of support for Jair Bolsonaro during the pandemic.
7 "Chefe, o Brasil está quebrado, chefe. Eu não consigo fazer nada. Eu queria mexer na tabela do Imposto de Renda, teve esse vírus potencializado pela mídia que nós temos aí, essa mídia sem caráter".

8 "São fábricas de fake news. Agora deixa o povo se libertar, porque tem liberdade".
9 "+1 [sic] vez uma ditadura preferiu esconder algo grave a expor tendo desgaste, mas q [sic] salvaria inúmeras vidas[.] A culpa é da China e liberdade seria a solução".
10 "O coronavírus nos faz despertar novamente para o pesadelo comunista".
11 "À custa da destruição dos empregos que permitem a sobrevivência digna e minimamente autônoma de milhões e milhões de pessoas".
12 Following data of the Johns Hopkins Coronavirus Research Center as of September 29, 2022.
13 This saying comes from the finding made by the DataFolha's pooling, which showed that Bolsonaro's approval rate was at 30% (O Globo 2022).
14 In Brazil, public higher education institutions account for almost all research in social areas such as health, education, and social security, as well as for most research groups in the biological and scientific fields. The systematic attack by the extreme right on higher education institutions may be directly related to the constitution of the anti-science discourse base of this political group. The appointment of people without a background in scientific training to positions in Institutes and Ministries of Science and Technology is evidence of how the political group does not have people with standing in these specific areas, as expected from scientists and researchers.

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15

"*ENFRENTAR VÍRUS COMO HOMEM*"

Bolsonaro's Populism and Performing Hegemonic Masculinity during the COVID-19 Pandemic

Théo Aiolfi and Giulia Champion

Introduction

On March 30, 2020, Brazilian president Jair Bolsonaro adopted a defiant stance against the rise of the COVID-19 pandemic by choosing to walk the streets of Brasília. In stark contrast with the rising number of countries that had enforced national or regional lockdowns to prevent the spread of the virus, Bolsonaro met citizens in the open and without a mask, shaking hands and taking pictures as he conveyed the message that the virus should not worry Brazilian citizens and urged them to keep the economy going. Stopping in front of a small crowd, he started an impromptu speech in which he combined strength, masculinity, and a form of fatalism: "*Essa é uma realidade, o vírus tá aí. Vamos ter que enfrentá-lo, mas enfrentar como homem, porra. Não como um moleque. Vamos enfrentar o vírus como a realidade. É a vida. Todos nós iremos morrer um dia*" (BBC News Brasil 2020).[1]

This quote, which was the first of many outrageous and polarizing statements uttered by Bolsonaro during the pandemic, conveys his stance and shares his conviction that the upcoming health crisis was nothing more than a minor challenge to the Brazilian people that could be overcome provided we faced the virus "like men". Although this quote could be interpreted as a desperate last-minute attempt to justify the lack of preventive measures, its salience becomes more apparent when it is analyzed in the wider context of Brazilian politics and society, as well as that of the global rise of populism (Moffitt 2016). As such, the purpose of this chapter is to examine Bolsonaro's rhetorical response to the COVID-19 pandemic, notably his references to hegemonic masculinity, and discuss how they are best understood as idiosyncratic expressions of the populist style. Adopting a performative approach to populism, we focus more specifically on how Bolsonaro articulated his relationship with the Brazilian people during the pandemic through an analysis of various

political performances. By discussing Bolsonaro's performances in the local context of Brazil, we argue that his reliance on a hypermasculine *ethos* became even more prominent with the emergence of a health crisis that defied his nationalist and reactionary ideology.

In this chapter, we explore the intersection between Brazilian nationalism, populism, and hegemonic masculinity during the COVID-19 pandemic. We begin with a theoretical discussion of populism and performances of national identity, focusing specifically on the triadic articulation between the people, the elite, and the populist leader. Applying this framework to Brazilian politics, we then discuss the rise of Jair Bolsonaro, arguing that his "representative claim" (Saward 2010) to embody the Brazilian people is explained by two factors. First, the contemporary representation crisis brought about by the *Operação Lava Jato* ("Carwash Operation") scandal, which provided him with an elite to oppose. And second, by his choice to depict "the people" through a revival of deeper national narratives that dominated the dictatorship period (1964–1985), such as Gilberto Freyre's racial democracy and lusotropicalism concepts and the notion that the Brazilian army is a fundamental defender of Brazilian identity. After this discussion, we then focus on his performances of self as a populist leader, highlighting his reliance on hegemonic masculinity as a projection of strength and health, and the mirror association of femininity and queerness with weakness.

Connecting these theoretical discussions to the context of the COVID-19 pandemic, we then move on to an empirical analysis of four political performances conducted by Bolsonaro at various stages of the health crisis. Developing the specific way this co-constitutive articulation of the people and the populist leader was produced during the pandemic, we will particularly emphasize his infantilization of the people, linking it with the paternalism of previous Brazilian politicians such as Getúlio Vargas (President of Brazil from 1930 to 1945 and 1951 to 1954) and military leaders during the dictatorship. Lastly, by situating Bolsonaro's brand of populism in a history of uneven and unequal developments across gender, race, and class in a vast and complex country such as Brazil, we conclude this chapter by considering the influence of populism in the country. Discussing its strategic use to revitalize a reactionary form of nationalism, we argue that Bolsonaro's extreme reliance on the rhetoric of a masculinity crisis can be accounted for by his inability to react to an unprecedented health crisis that the lens of reactionary nationalism could not otherwise capture.

The Populist Style and Performances of Identity: Performing the People, the Elite, and the Populist Leader

Even if academic, political, and mediatic discourses on populism have resurged in Europe and the United States, particularly after the twin shocks in 2016 with the election of Donald Trump in the United States and the vote in favor of Brexit in the United Kingdom, the concept has particular resonance within the Latin

American context. Indeed, Latin America was described by De la Torre (2017, 195) as "the land of populism" because "from the 1930s and 1940s until the present, populist leaders have dominated the region's political landscapes" with the phenomenon taking multiple forms, which he described as classical populism, neoliberal populism, and radical populism. Despite its national specificities, Brazil is no exception to this recurring presence of populism, with examples of prominent politicians embracing the first two types found in, respectively, Getúlio Vargas and Fernando Collor de Mello (President of Brazil from 1990 to 1992). However, the case of Bolsonaro is qualitatively different from these three forms of populism, bearing more similarity with the nativist type of populism prevalent in Europe (Mudde 2007). But outside of these typological endeavors, the prominence of populism as a phenomenon in Latin America has led to the emergence of a rich theoretical literature spearheaded by the work of Laclau (2005), whose critical and holistic approach to populism serves as the main theoretical inspiration behind the conception of populism used in this chapter.

More specifically, this chapter places itself in the recent collective effort to bring together a "post–Laclauian approach to populism" (Ostiguy, Panizza, and Moffitt 2021, 8). This bears a threefold consideration. Firstly, this chapter is informed by a commitment to avoid normative judgment *vis-à-vis* populism. Inspired by the growing literature on anti–populism (Stavrakakis and Katsambekis 2019), unlike authors such as Müller (2016) or Norris and Inglehart (2019) who embrace the more or less explicit premise that populism is a potential threat to democracy, we do not assume that populism is automatically associated with illiberalism and/ or anti–pluralism. Secondly, this chapter challenges the notion that populism is a set of ideas and beliefs or an ideology, regardless of how "thin–centered" (Mudde 2004, 544) it might be, but instead argues that populism is better understood as a way of doing politics. Taking inspiration from Laclau, this shifts the theoretical focus from populism as a phenomenon that exists *a priori*, toward a conception of populism as something being done and enacted. This shift emphasizes the importance of making a distinction between substance and form. More specifically, this means acknowledging that the ideological "content" put forward by a political actor should be analytically separated from the way this content is being articulated, even though there are practically interconnected as form and substance continually shape each other.

Thirdly, this chapter embraces what has been called "the performative turn in the study of populism" (Ostiguy and Moffitt 2021, 49). In a natural extension of the aforementioned argument that populism is something that is being done and enacted, this practically entails an engagement with the two interconnected concepts of performance and performativity. In short, these concepts operate symbiotically: performances constitute the site in which performativity comes into action while performativity expresses the ontological effects that performances create. In the case of populism, this dynamic operates through the populist leader who does not "speak to or for some pre-existing 'people' but arguably bring[s]

the subject known as 'the people' into being through the process of naming, performance or articulation" (Moffitt 2016, 24), a conception which finds its roots in Laclau's (2005, 103) work.

In the context of this performative and critical approach to populism, we define populism as a political style, that is an open-ended repertoire of political performances made up of three major performative clusters, adapted from the work of Moffitt (2016, 45). The first one includes performances of transgression, understood as "the violation of a norm of political relevance, whether that norm is directly political, socio-cultural, ethical, legal and so on" (Aiolfi, 2022, 6). The second cluster of the populist style is made up of performances of crisis, that is the symbolic articulation that the society is undergoing a crisis requiring urgent action. The third performative cluster, which is the central focus of this chapter, is the performance of identity. Broadly defined as the social construction of what makes a group or individual distinctive from others, the concept of identity as it is used in this chapter is influenced by post-structural understandings of the concept, notably the influential work of Derrida (1978). What that implies is an anti-essentialist stance on identity, which does not refer here to a form of preexisting essence that would intrinsically characterize someone or something. Instead, identity is framed for the purpose of this work as an unstable and relational concept that is always spatially and temporally situated as well as performatively constructed. Furthermore, identity is about drawing a boundary between what is self and what is not. It is hence ontologically produced through the simultaneous and complementary "processes of linking and differentiation" (Hansen 2013, 17): linking disparate features into an apparently cohesive whole and differentiating self through the contrasting figure of the other(s) who do(es) not share these characteristics.

Although identity is arguably part of the performative repertoire of every political actor, what makes populist performances of identity different from others is that they simultaneously constitute two forms of identity: on the one hand, they present politics as an antagonistic opposition between the people and the elite (Laclau 2005, 160); on the other hand, they ground this collective claim to represent the people into the embodied performance of an individual, the populist leader who must tread the subtle tightrope between performing ordinariness and extraordinariness (Moffitt 2016, 52). In order to develop more visually the way populist performances of identity operate, we offer here a schematic representation (Figure 15.1) of the three co-constitutive elements performatively constructed in a populist performance: the people, the elite, and the leader, which constitute the "triad of populist representation" (Casullo 2021, 77).

These elements distinguish themselves from each other depending on whether they rely on collective performances of identity aggregating a large group of individuals, such as the elite and the people, or whether they are articulated as individual performances of self, as is the case for the identity of the populist leader. Furthermore, they are also separated depending on whether they rely on performing commonalities, such as the people, particularity, such as the elite, or a
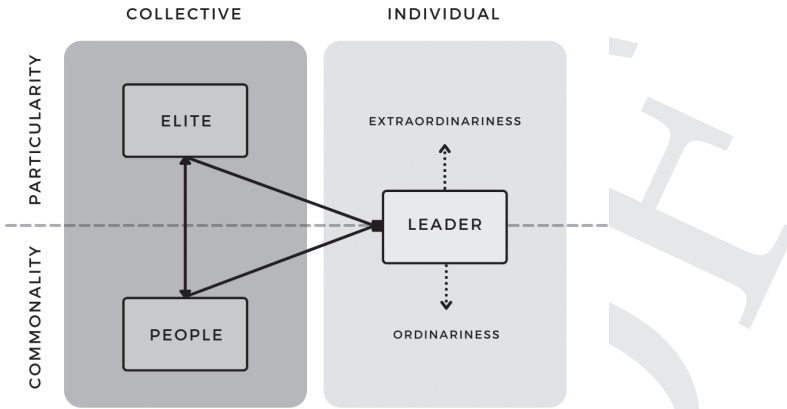
FIGURE 15.1 Bolsonaro's Collective Performances of the Political Elite and the Brazilian People

hybrid combination of both, as is the case for the leader. In this perspective, "the people" is articulated through collective performances of identity relying on commonality, emphasizing common traits between not only members of the group but more generally with the deep systemic sociocultural resources shared within the political community where the performance takes place.

Placed in opposition and an antagonistic relationship to the people, "the elite" is also constructed through collective performances of identity, but its articulation emphasizes particularity, that is characteristics that set this group apart from the rest of society. People and the elite in the populist framework are thus in tension, which is represented here with a double arrow, co-constituting each other in reference to what the other is not. The final piece in this puzzle that ties them all together is the performative role of the leader whose performance of self is hybrid, combining and balancing references to commonality and particularity. This hybridity of the performance is produced because of the need for the populist leader to simultaneously show his proximity with the people ~~that he claims to represent~~, showing that he is "one of us" through references to commonality, while also justifying his leadership position by making the case for his own exceptionality. Doing too much of the former would destabilize his role as the central point of identification for the people. Doing too much of the latter would distance him from the people and associate him with the elite whom he has sworn to fight. This tension between ordinariness and extraordinariness (Moffitt 2016, 52) is also represented here by a double arrow and justifies the position of the leader in between references to commonality and particularity.

Exhaustively applying this theoretical framework to the case of Jair Bolsonaro would be an endeavor far beyond the scope of a single chapter, which is why we have decided to primarily focus on performances of identity. While the other

performative clusters of transgression and crisis are also central to Bolsonaro's style, we have chosen to specifically address the relationship between people and the leader to highlight several salient features that best capture the way he (mis) handled the COVID-19 pandemic.

After he was elected president of Brazil in 2018, the success of his claim to represent the Brazilian people (Saward 2010) was incontestable and became institutionally solidified. However, we argue that the meteoric rise of this former military officer and career politician who was a federal deputy in the *Câmara dos Deputados*, the lower house of the National Congress of Brazil, since 1990 can be accounted for by a combination of two factors that were channeled through his populist performances of collective identity. The first factor was the contemporary crisis of representative politics in Brazil, most particularly of the *Partido dos Trabalhadores* (PT, "Workers' Party"), which was set in motion by the *Operação Lava Jato* in 2014, a money laundering inquiry that turned into a criminal investigation. Its findings highlighted systematic corruption involving a wide number of established politicians, including former president Luiz Inácio Lula da Silva, who was indicted and jailed in 2018.

Although *Lava Jato* can be seen as "inquisitorial" and "controversial" because it gave "arbitrary power to individual judges", it also reflected the fact that "tolerance of corruption has declined and accountability institutions have been strengthened in Brazil" (Pereira 2020, 88). Regardless of the debates about the legitimacy of the investigation and its legal consequences, *Lava Jato* completely reshuffled the cards of Brazilian politics, bringing popular discredit to much of the political establishment, most notably the PT which had dominated Brazilian politics for 13 years. The party's fall from grace reached its peak in 2016 with the impeachment of Dilma Roussef, Lula Da Silva's hand-picked successor, and the subsequent 2018 elections in which Lula himself could not run and the PT had to nominate Fernando Haddad, the former mayor of São Paulo, as a last-minute replacement who could not replicate his popularity (Gontijo and Ramos 2019, 10). Even if *Lava Jato* marked the legal apex of the antiestablishment wave that unseated the PT, Pereira (2020, 86) highlights that the roots of this resentment can be traced back to national protests in 2013 that were not only "the largest in a generation" but also the signal of "the existence of a wide gap in trust between Brazilian citizens and their elected representatives".

In addition to the short-term strategic benefits of clearing the electoral field of prominent rivals, what *Lava Jato* and the impeachment of Rousseff offered Bolsonaro was the perfect opportunity to build the narrative of a corrupt elite that had failed the Brazilian people. Even if the investigation also indicted members of the economic elite, it was political leaders, whose legitimacy directly depended on the approval of those they claim to represent, who were particularly affected by the antiestablishment feelings provoked by *Lava Jato*. Although Bolsonaro was not the only politician who could have made tactical use of the increasing resentment against the political elite, his position as an insider-outsider in the Chamber

of Deputies provided him with a comparative advantage. Indeed, as a member at the time of the Social Liberal Party (PSL, "*Partido Social Liberal*"), a marginal party that never made any compromises with the government, Bolsonaro did not suffer from the impact of the scandal.

Although this position came to him through circumstances and not because of a prior tactical choice, Bolsonaro found himself in a hybrid position between ordinariness and extraordinariness, a marginal politician hitherto (in)famous for his transgressive speeches on the military and gender-related polemics (Mendonça and Caetano 2020, 219) who had managed to maintain his political capital and legitimacy despite the crisis of representation. In other words, although his earlier critique of the elite might have fallen on deaf ears, the *Lava Jato* scandal provided Bolsonaro's negative representation of the political elite with an ideal resonance. Unsurprisingly, he took the opportunity by publicly showing his scorn for PT politicians whom he repeatedly called "communists", particularly during the impeachment and the following campaign. For instance, on the day that Rousseff learned of the formal start of the process, Bolsonaro, accompanied by his son Eduardo, held a banner that read "*O Brasil não aguenta mais você. Cai fora*" (Benites 2016).[2] And as he cast his vote in favor of Rousseff's impeachment, Bolsonaro dedicated it to Colonel Carlos Alberto Brilhante Ustra, the most infamous torturer of the military dictatorship (1964–1985), claiming that "They [the left] lost in 1964, they lost now in 2016". Gontijo and Ramos (2019, 6) described this parallel as establishing the "parliamentary coup of 2016" as a "parody" of the military coup of 1964.

This nostalgic throwback to the military era is part of the second factor that constituted Bolsonaro's performances of idea: his choice to depict "the people" reviving deeper national narratives prevalent during dictatorship in the country. Indeed, framing the elite as corrupt is not enough to imbue one's collective performances of identity with the populist style, as the elite is only one of the two sides of the populist way of framing politics. Nonetheless, while Bolsonaro only managed to find an echo for his antiestablishment rhetoric with the propitious context of the *Lava Jato* scandal, his depiction of the people resonated with much deeper narratives that he had been advocating since the beginning of his political career. Blending nationalism with religious conservatism and a fervent defense of the military dictatorship, Bolsonaro's far-right ideological stance bore numerous similarities with other right-wing populist leaders.

However, Bolsonaro's "religious nationalism" (Pereira 2020, 112) differed from the racially exclusive nativism of Western populism in its choice to echo Gilberto Freyre's myth of Brazil as a "racial democracy", that is a country whose strength lay in the *miscigenação* ("miscegenation") of its population. Indeed, "during the election and throughout the first months of his government, Bolsonaro has gone on the offensive to deny the existence of racism in Brazil" (Alfonso 2019, 45), claiming to be color-blind regarding race issues that should be subsumed within *brasilidade* ("Brazilianness"). Beyond the limitations of this foundational

myth of Brazil, Alfonso demonstrated that Bolsonaro's commitment to "racial democracy" was extremely shallow and opportunistic, praising some racial minorities such as the Japanese as "a dignified race" while repeatedly attacking Afro-Brazilian communities. However, regardless of his actual convictions on the matter, Bolsonaro's choice to pay lip service to the myth of "racial democracy" not only downplayed accusations of racism, but also allowed him to adopt another related concept developed by Freyre: lusotropicalism, or the notion that Brazilian people have a distinctive trait they inherited from Portuguese imperialism. Through references to a form of Brazilian specificity, Bolsonaro then reinforces a narrative of Brazilian exceptionalism that is coupled with his discourse of "the people".

As Burke has noted,

> one important characteristic of Freyre's way of thinking was his love of setting up binary oppositions such as *casa-grande* ("big farmhouse" of the masters) and *senzala* ("slave quarters"), or "order" and "progress", only to undermine these oppositions by stressing what he liked to call mixing or "interpenetration". Freyre liked to return to the concept of *mestiçagem*, to play with it or, as he would say, to dance with it, pushing it to see how far it would go.
>
> *2011, 70*

This type of binary thinking was steeped in a foreign understanding and hierarchization of the world, as Burke explains throughout his piece. This type of dynamic is not unique to Freyre and different forms of it can be found, including in the cannibalization of European culture described in Brazilian modernism and *Antropafagia* movements[3] (Schiess and Champion 2022).

In the world of Brazilian politics, as Ribeiro (2020) argued, Getúlio Vargas himself adopted a number of Freyre's articulations of Brazil and in particular, the notion discussed above of the nation as a "racial democracy". Hence, perpetuating the (mis-)understanding of *mestiçagem* that appeared to be a positive hybridity when it was a racist construct containing anxieties over miscegenation and translating Brazil's structural and systemic inequalities:

> With the international media buying into the "racial democracy" discourse, it is no wonder that the election of President Bolsonaro in Brazil – openly intolerant towards women, the downtrodden, and different ethnicities and sexual orientations – took the world by surprise. It served as a partial wake-up call that decades of denying racism in the country that received the most slaves during the Atlantic slave trade only abolished slavery in 1888, and never had a Civil Rights Movement may have somehow facilitated Bolsonaro's election.
>
> *Ribeiro 2020*

However, even if one can doubt Bolsonaro's sincerity regarding Brazil as a racial democracy, his performances toward "the people" were also characterized by the centrality of two signifiers: the army and the nation. The use of the army was highlighted, for instance, in Bolsonaro's comments in April 2018 after the murder of two members of the Afro-Brazilian community: "The army did not kill anyone. The army belongs to the people. We cannot accuse the people of murder" (cited in Alfonso 2019, 44). This quote demonstrated a deliberate attempt to frame the army as being more than a protector of the people, but as the people themselves. This, in turn, helped it avoid accountability, elevated its symbolic legitimacy, and demonstrates Bolsonaro's nostalgic and reactionary longing for the military dictatorship. The association between people and nation was even more prominent and had an affinity with other nationalist forms of populism.

As argued by Anastasiou (2019, 1), this prominence reveals the subordinated position of the empty signifier of the people in right-wing populism which is "parasitically signified *vis-à-vis* the hegemonic signifier 'the nation'" whose ideological messages both subsume and replace it. However, the choice to use "the people" as a signifier and functionally as a synonym for "the nation" is strategic. Unlike the concept of nation, which is heavily associated with right-wing rhetoric, the empty signifier of the people is for nationalist politicians like Bolsonaro an attractive alternative with less ideological baggage that allows them to present their ideas with a new "coat of pain". More than an empty concept, "the people" is associated with the notion of popular will and is hence imbued with democratic authority. Unlike the nation, whose political defense may appear arbitrary and disconnected from electoral reality by relying on symbolism, "the people" additionally offers both materiality and legitimacy to political actors who claim to represent it. Furthermore, as was argued by De Cleen and Stavrakakis (2017), the verticality of the frame of the people is complimentary with nationalism's horizontality. This discursively implies the ability to identify one's cause with that of the underdog and the powerless, a positive connotation that can be combined with a horizontal fight against foreign influences by associating the oppressive elite with threatening others. These advantages account for Bolsonaro's choice to project his nationalist discourse through the populist lens, as a way to offer a modernized version of his ideology without leaving himself or his followers open to accusations of xenophobia or racism.

Bolsonaro's Individual Performances of Self as a Masculine Populist Leader during COVID-19

As was already mentioned in the previous section, the collective articulations between the people and the elite are crystallized through the embodied performance of the populist leader. However, although populism is characterized by a representative claim *vis-à-vis* the people, it does not build its symbolic power on "descriptive representation" (Pitkin 1972, 11) or "mirror representation" (Diehl

2017), that is on accurately reflecting the character of the people, but instead is what Casullo (2021) described as "synecdochical representation". Just like a synecdoche, whereby a part is used to describe a totality, this form of representation implies strategically choosing one part of self to portray the whole constituency while keeping the others as completely different from the object that is represented. Quoting Casullo at length:

> Similarity between representative and represented is a necessary but not sufficient element in populist representation. […] A representative must resemble their constituents. In some respects but must be completely unlike them in others. I call the process by which some elements of "likeness" are selected, and others ignored "synechdochal representation". […] The leader resembles the people only partially, and only in those aspects that the leader has chosen as signifiers. And more crucially, the leader *does not* resemble the people in other crucial aspects, because she is judged to be exceptional and charismatic by her followers.
>
> *Casullo 2021, 78*

What matters when considering Bolsonaro's individual performances is highlighting his hybridity between ordinariness and extraordinariness, how it takes shape in his style, and why he chooses to highlight specific facets of his *persona*. Mendonça and Caetano (2020, 212) have convincingly argued that "Bolsonaro's visual self-representation is deeply marked by eccentricity and ordinariness, which makes his demeanor, his body, and his appropriation of institutional power function as a series of parodies". More than this,

> while stripping the presidency from its extraordinary dimension, the parody paradoxically does something extraordinary by re-establishing the distance it sought to eliminate. Bolsonaro's eccentric rejection of basic social standards, over-the-top masculinity, and impromptu use of everyday objects as props work to construct an image that he is just an ordinary man, extraordinarily occupying the presidency.
>
> *Mendonça and Caetano 2020, 212*

Among the features Mendonça and Caetano (2020) highlighted, we argue that the most prominent dimension in his performance of self, which was even more salient during the COVID-19 pandemic, lies in reliance on hegemonic masculinity, which is the main focus of this chapter's last section. Indeed, particularly at a time when the Brazilian people were physically affected by the virus, Bolsonaro chose to rely on hegemonic masculinity as a way to project strength and health. Understood as the dominant conventions and beliefs related to masculinity in a specific society, this concept coined by Connell and Messerschmidt (2005) allows us to not only highlight the ideological roots in conservatism and nationalism of

Bolsonaro's hypermasculine framing of self, but also interrogate the idiosyncrasies of masculinity in the context of a postcolonial country such as Brazil.

A particularly noteworthy characteristic of Bolsonaro's performance of masculinity is that it allows him to convey both aspects of the hybridity between ordinariness and extraordinariness, a point showcased by Assumpção (2020, 11) when considering the semiotics of various pictures that he posted on Facebook. She showed that references to signifiers of masculinity like football allowed him to appear ordinary and connected with the passions of the Brazilian people, adding that portraying himself as a "caregiver and family leader" and his wife as "supportive" was a way to showcase his ordinary life while reinforcing traditional gender roles. Conversely, she showed that masculinity was associated with power and authority, as was exemplified by his frequent choice to appear in a suit or associated with other Western strongmen, notably Trump. Nonetheless, as we focus on the COVID-19 crisis, we have chosen for this chapter to engage with another use of hegemonic masculinity in Bolsonaro's performance, concentrating on his framing of the self as a father figure and the converse infantilization of the Brazilian people. To do so, we have zoomed in on four public performances[4] particularly salient and representative of his style to offer an in-depth case study of his way of projecting power through hegemonic masculinity at various stages of the pandemic, and conversely highlight the mirror association of femininity and queerness with weakness.

Bolsonaro's descriptions of the virus in public appearances and official governmental messages continually mobilized rhetoric pertaining to hegemonic masculinity, reinforcing his image as a "strong paternal figure" and framing the people, in particular the Brazilians who took the virus seriously, fell sick, or criticized his disastrous management of the pandemic as capricious and weak children. His infantilization of the Brazilian people was accompanied by a minimization of the pandemic realities and a dismissal of fear and rationality by discursively associating femininity and queerness with weakness. In this section of the chapter, we argue that this rhetoric was built on the development of a racist and heteronormative discourse in Brazil based on and building on Gilberto Freyre's framing of the nation in his writings as well as previous Brazilian populist gender discourse, in particular those deployed by Brazilian presidents Getúlio Vargas (1930–1945, 1951–1954) and Juscelino Kubitschek (1956–1961).

Going back to the discussion above of Bolsonaro's superficial embrace of the myth that Brazil is a "racial democracy", another specificity of his use of masculinity could be found in the way he intertwined traditional forms of masculinity with the empty signifiers of *mestiçagem* and hybridity in different circumstances, most notably during his speech delivered during the G20 summit in 2020:

> Brazil has a diverse culture, which is unique among nations. We are a miscegenated people. Whites, blacks, and Indians have built the body and

spirit of a rich and wonderful people. In a single Brazilian family, we may
contemplate greater diversity than we would in countries taken as a whole.

Bolsonaro 2020a

The use of the term "family" in particular played a critical role in most of
Bolsonaro's populist gendered rhetoric. Indeed, in what Gabriel Funari (2022,
413) aptly describes as "a five-minute rant filled with expletives", Bolsonaro's
criticism of state and municipal authorities' imposition of lockdown measures, the
president noted his desire to arm the population to fight against these measures
and identified family, along with other elements, to be one of his most funda-
mental values: "*Quem não aceitar a minha, as minhas bandeiras (…) família, Deus,
Brasil, armamento, liberdade de expressão, livre mercado. Quem não aceitar isso, está no
governo errado*" (Grillo 2020).[5] Bolsonaro's *bandeiras* (flags),[6] as listed in the quote
above, were all neatly organized around a patriarchal understanding of the world
in which heteronormativity and the nuclear family are central. Moreover, the
fact that Bolsonaro associates his political opponents with dictatorships seems
ironic. We can also see how Bolsonaro's populism is close to those of Vargas and
Kubitschek as they also tailored their central policies around the family unit. As
Wolfe argued in relation to Vargas, the "nuclear family was the central organizing
trope for the populism that was to shape Vargas's new Brazil. He fashioned himself
the 'father of the poor'" (2010, 92).

This paternal relation to the people can be seen in Bolsonaro's engagement
with the Brazilian public, especially in the context of the COVID-19 pandemic
as he infantilized the people through various rhetorical strategies. For example,
he called people who feared falling sick as brats ("*moleque*") and not being adult
men ("*homem*"), as shown in the quote giving in this chapter's title. Furthermore,
Bolsonaro repeatedly encouraged the public to "face the virus" or "face our
problems", minimizing the pandemic itself by describing it as a little flu or mere
cold ("*gripezinha ou resfriadinho*"). In one instance, he noted that for him falling
sick would be riskless given his "athletic past" and that he survived far worse
situations such as when he had been stabbed during his electoral campaign: "*No
meu caso particular, pelo meu histórico de atleta, caso fosse contaminado pelo vírus não
precisaria me preocupar, nada sentiria ou seria, quando muito acometido de uma gripezinha
ou resfriadinho*" (Notícia Da Manhã 2020, 2:32).[7]

In a more recent address to the public during the inauguration of a new section
of the North-South São Simão (Goiás state – GO) to Estrela d'Oeste (São Paulo
state – SP) railway track, he also praised rural workers and farmers who continued
to work and who did not "remain home and cower" in face of the pandemic,
hence supporting the country's economy: "*vocês [produtores rurais] não ficar em casa,
não se acovardaram e nós temos que enfrentar os nossos problemas*" (O Globo 2021).[8]
He then continued to admonish people who have, in his logic, been cowardly
about the pandemic: "*Chega de frescura e de 'mimimi'. Vão ficar chorando até quando?
Temos que enfrentar os problemas*" (Toeldo and Cicci 2021).[9] By warning "these

people" that they should stop with their "whining" and using an onomatopoeia to mirror childish moaning, he not only persevered in his infantilizing rhetoric but also clearly established a dichotomy between "us" and "them" when he asked when "their crying" would end. As he continued this speech he also asked: "*Mas onde vai parar o Brasil se nós pararmos?*" (Toledo and Cicci 2021).[10] This rhetorical question indicated his focus on the economy, in the hope of continuing to ground himself as a candidate of the working people and particularly of the most precarious communities or, a "father of the poor", as Vargas described himself. However, this association between family dynamics and the economy was also grounded in Kubitschek's politics and his plan for the Brazilian family unit, which focused on creating "middle-class, consumer-oriented families" (Wolfe 2010, 92).

As Wolfe noted, Kubitschek shifted the post-Vargas focus from "women as workers to women as housewives, even though the majority of Brazilian women continued to work outside the home" (2010, 93). This type of discourse was itself underpinned by a long-established mobilization of women's personhood and bodies in the development of the capitalist system. Indeed, the overall production system relies on the nuclear family to maintain current workers healthy and happy, and therefore to continue to work as well as produce new workers; roles fulfilled by the housewife and mother. Additionally, the nuclear family itself emerged "in the period of primitive accumulation also as the most important institution for the appropriation and concealment of women's labor" (Federici 2014, 97).

The very fashioning of the nuclear family, and the gender roles supposedly inherent to it, was attached to the reproductive exploitation of women's bodies in the development of the capitalist system. For this reason, any threat to the destabilization or destruction of this family unit could be seen as an attack on the core of the economic system. This thus accounts for the alignment in Bolsonaro's rhetoric between economic interests and a gendered rhetoric grounded in hegemonic masculinity – whether in his words or in the strategy to wear football jerseys when delivering official addresses to continue to frame himself as a patriarchal man of the people – and reject any identity that does not fit such heteronormativity. This was also apparent in his promotion of the military regime as we have discussed above, a point showcased by Assumpção (2020, 12) who pointed to the "abstract appeal to the masculine idealization of the military" in Bolsonaro's repertoire. Indeed, a notable element of Bolsonaro's gendered performance of self is the association between his own masculinity and his status as a former military officer, which framed military values as paragons of masculinity and conversely himself as the embodiment of these values. This is also ironic given that he was dismissed from the army after having been tried twice.

However, and in accordance with the post-structural understanding of identity highlighted above, the performing self is a process of setting boundaries, which hints at the inevitability of a converse articulation of a negative alterity that embodies the opposites of one's traits. In the corpus of performances studied for this chapter, this negative articulation of identity was clearest during a ceremony

in which Bolsonaro announced plans for the tourism industry on November 10, 2020. Using the homophobic slur of "*maricas*" ("sissies") in combination with the Darwinist form of fatalism already discussed in the introduction, he pointed at the weakness of the country during the pandemic:

> *Tem que acabar com esse negócio, pô, lamento mortos, lamento. Todos nos vamos a morrer um dia. Todo mundo vá morrer (…). Não adianta fugir disso, fugir da realidade. Tem que deixar de ser um país de maricas, pô. Olha que prato cheio para a imprensa. Prato cheio para a urubuzada que está ali atrás. Temos que enfrentar de peito aberto, lutar. Que geração é essa nossa?*
>
> *TV Brasil Governo Agora 2021a, 3:32*[11]

This type of discourse is grounded in an age-old demonization of queerness, which is underpinned by the supposed death drive of which queer relations are accused as they appear, in a capitalist logic, to be socially "useless" given that they do not provide a space for reproduction (Edelman 2004). As noted by Assumpção, "being a man in Brazil means being a leader, being the 'head of the house', protecting and guiding the wife and the children, being strong and commanding, being free and, interestingly enough, playing football" (Assumpção 2020, 8). This played hand-in-hand with Bolsonaro's militaristic discourse, which celebrated the:

> lure of firearms in the development of male personhood in Brazil […]. In Morro, as in many Brazilian favelas, a large subset of male teenagers joined the drug trafficking trade. Their counterparts presented a contrasting yet related identity behavior – for example, joining the army or police force, which is only an option for a few of these young adults. For those who escaped a life of crime but were not offered a position in the army or police, working as a security guard was a third alternative to reverting back to the invisibility of the poor, to gain respect, to assume the role of protector, to have a place in a hierarchical structure.
>
> *Pinheiro-Machado and Scalco 2020, 26*

Or, as Funari noted, in the context of Bolsonaro supporters, "individual gun ownership represents an opportunity to reassert patriarchal domination in a social context where constant violence generates affective insecurities" (2021, 10).

Conclusion

Many scholars argue that populism "surges most strongly in contexts of crisis" (Roberts 1995, 113) or claim at the very least that "some degree of crisis […] is a necessary precondition for populism" (Laclau 2005, 177). However, a characteristic of the stylistic approach to populism we used throughout this chapter is that it turns this perspective completely upside down. Instead of arguing that crises

are the root cause of populism, the second performative cluster of the populist phenomenon, performances of crisis are based on the premise that politicians use the populist style to actively perform the image of a society in crisis in order to convince their audiences that they live in a turning point of history where their vote will change politics for the better. Indeed, our approach sees "crisis as a phenomenon that can be experienced only through mediated performance, whereby a systemic failure is elevated to the level of perceived 'crisis'" (Moffitt 2016, 118). Such an ontological shift in perspective acknowledges that there is not one single universal understanding of crises that can be objectively defined, but rather a multiplicity of potential phenomena linked to their specific cultural, social, and political contexts which have to be symbolically mediated, in other words strategically framed, for them to emerge as a crisis. This definition thus emphasizes the performative dimension of the concept of crisis in the sense that the very idea of crisis comes into being through the performances of a political actor to a specific audience. That is not to say that crises have no basis whatsoever and, to develop this idea, we follow Hay's (1999) distinction between failure and crisis. In his influential work, he famously defined a systemic failure as "an accumulation or condensation of contradictions" that make a system unable to be perpetuated, "whether perceived or not", while a crisis is "a condition in which failure is identified and widely perceived, a condition in which systemic failure has become politically and ideationally mediated" (Hay 1999, 324).

As was highlighted in our discussion of collective performances of the elite and the people, Bolsonaro relied on two types of performance of crisis. The first, and the most recent, was brought to him on a silver platter with the *Operação Lava Jato* which provided the ideal context to articulate the idea that Brazil was facing a severe crisis in its political establishment and, more generally, a crisis of representation that could be solved through the leadership of less corrupt politicians as himself. The second type of crisis Bolsonaro articulated was more multifaceted and grounded in his nationalist and reactionary ideology. As hinted at by many of the quotes we highlighted, Bolsonaro framed Brazil as undergoing multiple crises that fit his nationalist agenda: a crisis of traditional and religious values, which his commitment to Christianity could tackle; a crisis of insecurity, which his tough "law and order" stance would solve; and finally a crisis of masculinity, which had led the Brazilian people to become weak and feminized. Although these performances of crises held fast for the first years of Bolsonaro's presidency, the emergence in 2020 of a much less subjective and contestable failure of the global system with the COVID-19 pandemic deeply challenged his narrative of crisis. With the COVID-19 virus being globally and unanimously recognized as a crisis, the pandemic started to dominate the political conversation, overshadowing every other crisis in the public imaginary, a fact that Bolsonaro himself lamented as he complained that "*Tudo agora é pandemia*" (TV Brasil Governo Agora 2021b, 3:31).[12] Showing that Bolsonar was unable to process this health crisis through the ideological lens of his "religious nationalism" (Pereira 2020, 112), we have showcased

in this chapter that ~~Bolsonaro~~ attempted to reframe COVID-19 as a crisis of masculinity that did not need urgent containment and medical measures but could be handled as long as Brazilians stopped being "sissies" and faced the "virus like a man". Through this strategic performative move, and despite every form of scientific evidence going against him, Bolsonaro hence attempted to reassert the control of the situation as well as the validity of his reactionary narrative in the face of a crisis that he was ideologically ill-equipped to handle.

Although our chapter does not hope to tackle the extremely wide political and ethical ramifications of Bolsonaro's treatment of the pandemic, we wished to highlight how a critical and performative approach to populism could partly account for what would otherwise be understood as a nonsensical reaction ~~to~~ denial. More than this, through an engagement with some of the deeper idiosyncrasies of Brazilian politics and culture, what our chapter highlights is the heavily contingent nature of populism as a chameleonic style that not only gets adapted to the ideological agenda of a politician but also resonates with a specific political context.

Notes

1 "It is a reality; the virus is here. We need to face it, but face it like a man, dammit. Not like a kid. We need to face the virus. Like a reality. That is life. We will all die one day".

2 "Brazil does not tolerate you anymore. Get out".

3 The concept of incorporating other cultures while developing a new identity was expressed in Brazilian modernism through the concept of cannibalism, formalized in the *Manifesto Antropófago* (Cannibal Manifesto) written by the poet Oswald de Andrade.

4 Among these, we can consider: (1) An official announcement broadcast on television on 24/03/20 (Bolsonaro 2020b); (2) The aforementioned speech on the street was on 30/03/2020 (BBC News Brasil 2020); (3) The speech occurred during a ceremony to announce plans for the tourism industry on 10/11/2020; (4) The speech for the inauguration of the North-South railway on 04/03/202 (TV Brasil Governo Agora 2021a).

5 "Whoever does not accept my flags: family, God, Brazil, guns, freedom of expression, free market ... whoever does not accept this is in the wrong government".

6 Beyond the literal meaning of "flags", *bandeiras* also has nationalist undertones, implicitly referencing the *bandeirantes* (flag carriers), explorers, and later ~~slavers~~ from the early modern history of Brazil who were considered heroes in traditional Brazilian historiography but whose violent practices have been challenged in more critical accounts of the country. The *bandeiras* (often political flags) can also connote main goals, causes or worldviews supported by political parties.

7 "In my particular case, given my past as an athlete, should I be infected by the virus, there would be no need to worry, I would feel nothing, and it would be nothing, just like when you have a little flu or a mere cold".

8 "You [farmers/agricultural producers] have not stayed at home, you did not behave in a cowardly fashion, and we have to face our problems".

9 "Enough whining and 'mimimi' (complaining). Until when are they going to keep crying? We have to face our problems".

10 "But, where will Brazil end up if we stop now?"

11

> This needs to stop. I feel sorry for the dead, I do. But we'll all die one day. Everyone will die. (…) There is no point running away from it, running away from reality. [Brazil] must stop being a country of sissies. […] We need to face it open-hearted, to fight. What kind of generations is ours?

12 "Now everything's about this pandemic".

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16
CONCLUSION

Anthony W. Pereira

Understanding right-wing populism is unavoidable for analysts of contemporary politics. Right-wing populism looms especially large as a category of analysis for scholars of Latin America. Latin America is the region of the world most associated with populism (Hennessy 1969, 28), where it took hold in many of the region's principal countries in the middle of the 20th century and which has reappeared in successive waves since.[1]

This book analyzes right-wing populism within and beyond Latin America. It engages with different theoretical perspectives on populism, examines the political economy of right-wing populism (the conditions that give rise to it, the nature of mass-elite relations within it, and the policies of right-wing populists in power), explores the impact of right-wing populism on civil society and state institutions, and analyzes the impact of the COVID-19 pandemic on one right-wing populist government, that of Jair Bolsonaro in Brazil, both in terms of how this government responded to the public health emergency and how the emergency, in turn, gave rise to new forms of populist discourse and practice. In addition to empirical material from Latin America, the book examines cases from Europe, the United States, India, and the Philippines.

While the various chapters in this edited volume present different perspectives on populism, they all contribute toward a global, empirically, and historically grounded understanding of the phenomenon. Populism is a contested concept. Those who reject it do so because of the perceived inconsistency and bias in its use.[2] One of the most widely cited definitions, by Mudde and Rovira Kaltwasser (2017, 6), is that populism is a

> thin-centered ideology that considers society to be ultimately separated into two homogenous and antagonistic camps, the "pure people" versus "the

corrupt elite," and which argues that politics should be an expression of the *volonté générale* (general will) of the people.

This definition is not universally embraced. As critics point out, in Latin America, populist leaders were often seen as more corrupt, and sometimes more openly corrupt, than the elites that they challenged for political power. Similarly, the "people," however, they were described (e.g., the shirtless ones, or *descamisados*, in Peronism) were not usually seen as pure, "whether morally, ethically, ethnically, or otherwise" (Ostiguy, Panizza, and Moffitt 2021, 3). These authors also argue that the idea that politics should reflect a general will is inherent in democracy rather than distinctive to populism.

Despite these caveats, most contributors to this edited volume would probably accept a minimalist definition of right-wing populism as movements, parties, governments, and leaders who engage in transgressive political performances that oppose "elites" in the name of the "people," rely at least in part on unmediated communication between a leader and followers, and spread right-wing ideological messages such as anti-globalism, traditional social values, and ethnic or religious nationalism. Right-wing populism can thus be distinguished from other forms of populism with different (especially left-wing) host ideologies, as well as right-wing movements, parties, governments, and leaders that do not rely on populist discourses, performances, or styles.[3]

This concluding chapter will consist of three sections. The first part will discuss some challenges in the study of right-wing populism. The second section will summarize the main findings of the chapters in the book, and the third section will raise questions for further research.

Problems in the Study of Right-Wing Populism

There are many challenges in the study of right-wing populism, but three stand out. These are separating normative and analytical issues, distinguishing populism from its "host ideologies," and differentiating between subtypes of right-wing populism.

Ernesto Laclau (2018, 297) warned of the danger of allowing ethical condemnation to crowd out analytical rigor in the study of populism. This is an ever-present problem. Researchers need to engage in the comparative method, gather data, present plausible narratives that explain change and variation, and create subtypes of elite-mass politics in which right-wing populism is included.[4] As part of the same task, non-populist forms of elite-mass politics such as class politics, pluralism, and technocracy must also be identified (Collier 2001, 11813).

However, Laclau's injunction is sometimes difficult to fulfill in practice. First, researchers are citizens as well as scholars. When they believe that democracy is threatened, their concern and anger may influence their analysis. And there is growing evidence that democracy is threatened. According to the Democracy

Matrix, a research project based at the University of Würzburg in Germany, the number of robust (or what they classify as working) democracies in the world has decreased since 2017, suggesting the beginning of a potential "third reverse wave" of democracy (Lauth, Schlenkrich, and Lemm, n.d.). Other researchers, such as those at the International Institute for Democracy and Electoral Assistance (IDEA 2019), confirm this trend. According to the International IDEA, the number of populist governments in the world has almost doubled since 2005, and the quality of democracy under these governments has declined (IDEA 2020). Scholars of comparative politics have noticed the evidence and started to write a democratic "recession," "regression," "de-democratization," "deconsolidation," and, in the words of Frances Fukuyama, the "re-patrimonialization" of democracies worldwide (Fukuyama 2014, 28).

Second, some reckoning with normative ideals may be inevitable in the study of populism. An example of this can be seen in the different perspectives on Peronism in the work of Gino Germani and Ernesto Laclau. These two authors approached the topic through different theoretical lenses. Germani used a structural approach and explained what he called "national populism" as a result of the non-integration of rural migrants to cities, where they were available for mobilization by sectors of the upper and middle classes (Germani 1978; see also Di Tella 1990, 4–5). Laclau, in contrast, used a post-structural framework to see Peronism in psychoanalytic terms as expressing a distinctive kind of populist "logic" (Laclau 2018, 214–221). In addition to these differences, Germani was alarmed by Peronism and criticized its authoritarian leanings, comparing and contrasting it with Italian fascism. Laclau, on the other hand, saw Peronism as a force that reinvigorated democracy.

Moffit (2020, 112) writes that researchers tend to view populism differently depending on whether their normative ideal of democracy is liberal or radical. He asserts that "the battle between liberal and radical views of democracy produces very different diagnoses, liberal democrats seeing populism as democracy's foe and radical democrats seeing it as democracy's potential savior" (Moffitt 2020, 111–112). Liberal democrats tend to decry populists' tendency to negate complexity, to engage in personalistic affirmations and attacks, to treat opponents as enemies rather than rivals, and to associate everything they oppose with "elites" or "the establishment." Radical democrats admire populists' ability to make politics more inclusive by mobilizing the previously excluded and disenchanted and to expose the corruption, hypocrisy, and dysfunction of established liberal democracies that have – in their view – been hollowed out by neoliberalism and globalization (Panizza and Stavrakakis 2020, 42).

However, most radical democrats are unlikely to admire what Panizza and Stavrakakis (2020, 28) call the "downward punching" nature of right-wing populism, in which an alien other, usually a member of a socially deprived group, is targeted and vilified. Right-wing populism is usually antiestablishment and anti-elite in its rhetoric, but to a greater extent than its left-wing counterpart,

in practice exclusionary, anti-poor, and backed by many who are wealthy and powerful. It also may be more prone to atomizing its support base and more reluctant to grant participatory agency to its followers (Panizza and Stavrakakis 2020, 38). Given such an object of analysis, it is especially important for researchers to retain what Laclau called "obstinant rigor" (Laclau 2018, 249).

Ethical judgment may be unavoidable in some instances. It is difficult for US-based scholars, for example, to be neutral when writing about the assault on the Capitol by supporters of former President Donald J. Trump on January 6, 2021. But, to the extent possible, normative preferences should not be allowed to distort analysis. It is important, for example, to understand the reasons why people support right-wing populist movements and to take the populist critique of contemporary liberal democracy seriously (de la Torre 2019, 24). It is also necessary to engage with those scholars who appear to admire right-wing populism (see, e.g., Eatwell and Goodwin 2018).

A second challenge is how to disentangle right-wing populism from its various host ideologies. As one influential group of scholars writes, "Populism rarely travels alone. It is necessary to identify what it travels with" (Rovira Kaltwasser et al. 2017, 17). We live in an era of populism with adjectives: left- and right-wing populism, inclusive and exclusive populism, national populism, religious populism, and so on.[5] Probably the most significant of these populisms is national populism, populism married to some form of nationalism. Like populism, nationalism is often defined as a thin ideology; in one version, it is the claim that there exists a unique nation deserving of recognition and autonomy (Breuilly 2013, 1–2). The elements of nationalism vary and can include language, race, ethnicity, religion, shared customs (including food, sports, music, and dance), a shared history, or some combination of those. Both populism and nationalism involve a dualism: the people versus the non-people, the nation versus the non-nation (Anderson 1991; Hobsbawm 1990).[6]

When a researcher argues that people help to create or support a right-wing populist movement or vote for a right-wing populist party or leader, but they do so more because of the conservatism of the message than because of the populism of the messenger, how are we to separate form from content? For some research questions, sophisticated survey instruments and focus group methodologies may be able to tease out an answer. However, for other questions form and content may blur, making the appeals of populism and its host ideologies difficult to distinguish. As Aiolfi and Champion remind us in this volume, form, and content continually reshape each other in right-wing populism.

A third challenge is similar to the second. If right-wing populism constantly changes, especially when a movement shifts from being oppositional to becoming part of a government, how do we capture this trajectory? Panizza and Stavrakakis (2020, 37) argue that in populist identification "it is 'the people' that 'creates' the leader as much as the leader that 'creates' 'the people'." This transmutation is unlikely to stop, making right-wing populism an elusive object of analysis.

The complexity of this task can be seen in the explosion of works on *Bolsonarismo* in Brazil, which peaked in the fourth year of Jair Bolsonaro's presidency. Early analyses of the electoral appeal of Bolsonaro were relatively dispassionate (Moura and Corbelini 2019; Nicolau 2020; Lapper 2021). The titles of some of the books that were published later reflect growing concern. They include terms such as the "limits of democracy" (Nobre 2022); "democratic recession and political degradation" (Avritzer, Kerche, and Marona 2021), and "the erosion of democracy" (Kerche and Marona 2022). In a more critical tone, there is "reactionary populism" (Lynch and Cassimiro 2022) and "malign neopopulism" (Albuquerque 2022). There is also a book with the metaphor of "the serpent's egg," which appears to be a reference to Shakespeare's Julius Cesar, in which Brutus decides to kill Cesar in order to prevent his tyranny, but in which the serpent's egg that spawns Bolsonaro is the protest movement that exploded in Brazil in June–July 2013 (Dieguez 2022).[7] Other work looks at the damage done by the Bolsonaro administration in specific policy areas; for works on foreign policy, see Loureiro 2022, Loureiro forthcoming, and Pereira 2021, 101–117. A rare book that is positive about *Bolsonarismo*, in contrast, depicts the political leader as a misunderstood victim of smug, ignorant, and evil elites (Mendes and Bolsonaro 2022, 7–22).[8]

Weyland (2019, 322) writes that populism's threat to democracy is double-edged: "There is a serious risk of a descent into authoritarianism both if populist leaders achieve political success *and* if they suffer a striking failure" (italics in the original). The accuracy of this statement is borne out in the Brazilian case. Following Bolsonaro's defeat in the 2022 election, analysis has shifted from an understanding of the impact of Bolsonarismo in government to its potentially disruptive role as a source of disloyal opposition to the government of Luiz Inacio "Lula" da Silva (2023–present).

Weyland (2019, 330) also argues that because populism is not rigidly ideological and instead opportunistic, right-wing populists such as Giorgia Meloni in Italy water down their extreme views and turn their ideas into vague slogans in power. According to Weyland, the right-wing populist wave in Europe may well move in an authoritarian direction (as governments in Poland and Hungary show) but are unlikely to become fascistic. Similarly, "populism in the US will probably not succeed in moving the polity in an authoritarian direction" (Weyland 2019, 333). Whether the conditions for these predictions are stable, however, is unclear.

Toward a Framework for Analysis

The main contributions of the chapters in this volume revolve around three issues. These are the drivers of support for right-wing populism, the nature of mass-elite relations in right-wing populism, and the consequences for political institutions and the quality of democracy of right-wing populist governments. Each of these will be discussed in turn.

With regard to the first issue, there is a considerable convergence among the contributors. Hunt, surveying the Fujimori and Uribe governments in Peru and Colombia, respectively, suggests that insecurity binds supporters of these governments together. Rettl finds that economic losses caused by trade and financial globalization increase support for far-right populist parties in both Europe and Latin America. Ferrari concurs with Rettl but adds intervening variables in the causal chain, arguing that economic hardship conditions result in support for right-wing populist parties only when psychological factors – such as perceptions of cultural and status threat and hostility toward some social groups and political elites – are present.

Ferrari, working exclusively with European cases, concludes that right-wing populist supporters and voters share fears that the national cultural identity is at risk. Avritzer and Rennó complement these findings by arguing that perceptions of downward mobility are positively correlated with voting for the right-wing populist candidate Jair Bolsonaro in the 2018 presidential election in Brazil. All of these arguments are broadly consistent with the twin cultural and economic arguments about right-wing populism, that they reflect a backlash against cultural change and a defense of traditional identities (Norris and Inglehart 2019) as well as a protest by the economic losers of globalization (Rodrik 2018).

Lero departs from this consensus somewhat, arguing that neither approach, developed for the Global North, adequately explains the Global South cases of the Philippines and Brazil. Instead, she identifies the "new middle class" as a pivotal base of support for Duterte and Bolsonaro. Because they are economically insecure, vulnerable to crime, unable to avoid tax, and therefore especially indignant about corruption and exposed through travel to the knowledge of poor[2] public service provision in their countries, these lower-middle-class voters support right-wing populists who reaffirm their victimization and demands for retribution. While the rich prosper under the status quo and the poor benefit from targeted social policies, many members of the new middle class come to share right-wing populists' disdain for politics as usual and desire for radical – and often violent – solutions to social problems.

The nature of mass-elite relations in right-wing populism is another theme that draws many of the contributors to this volume together. Hunt points to the endurance of authoritarian attitudes and behavior among Latin American elites. Spanakos urges us to carefully examine the institutional reform projects of right-wing populist movements before making conclusions about their potential for authoritarianism. De Mello and Estre point to the convergence of anti-globalist narratives among far-right populists on Twitter in Brazil, Spain, and Italy, suggesting that common conspiracy theories bring them together. Jaffrelot asserts that victimization is a key element in right-wing populism, with leaders gaining mass appeal both because they share the victimization by the establishment of their followers, but also because they promise to defend their followers by upsetting elites. De Lima shows that Bolsonaro's politicization of the police

and encouragement of their violence in defense of fearful citizens is similar to Modi's use of the police in India described by Jaffrelot. Rettl and Hatzikidi disagree on whether populism's emphasis on "the people" is inherently anti-pluralist. Rettl claims that it is; Hatzikidi gives examples of (admittedly left-wing) populist movements in which it is not. Spanakos appears to side with Hatzikidi.

All of the chapters in the section on COVID-19 give examples of identity formation within *Bolsonarismo*, the current Brazilian strain of right-wing populism. Sturari and Moretti-Pires argue that Bolsonaro taps into long-standing authoritarian tropes, using simplified and concise emotional language to create fear of a common enemy, conflating leftism with criminality, moral deviance, undeserved privilege, and lack of patriotism. Fake news is a key ingredient of this mix. Aiolfi and Champion emphasize the binary and heteronormative nature of *Bolsonarista* discourse, in which citizens were urged to confront the COVID-19 virus "like a man," with lockdowns, social distancing, mask wearing, and vaccinations branded the tactics of cowards and weaklings. Magalhães and Casarões argue that Bolsonaro and Trump's "medical populism" was rooted in an alt-science network of religious leaders, businesspeople, lobbyists, and doctors who challenged the views of the scientific community, universities, research institutes, public health officials, and the pharmaceutical industry. In Bolsonaro's case, he ordered the Army to manufacture 3.2 million doses of hydroxychloroquine and held aloft a box of the drug to supporters despite its unproven benefit during the pandemic (Pompeu 2021).

The final contribution of the chapters in the volume rests with their analyses of right-wing populist governments in power. Many of the chapters show how right-wing populists attack countervailing powers. They often lead as messianic father figures and use religious language to move the debate beyond rational inquiry into the realm of unquestioned dogma, a battle between good and evil. As Barros, Diniz, and Lotta argue, they used scorched earth policies against public sector bureaucracies, branding the latter as enemies of the people and attempting to replace their routines, procedures, specialized knowledge, and memory with political loyalists.

In the case of the Bolsonaro government in Brazil, de Lima argues that Bolsonaro's preference for hardline policing poses a risk to the police forces themselves, moving them toward an anti-system discourse that threatens their role as impartial civil servants. Avritzer and Rennó argue that Bolsonaro in government promoted a Manichean and moralistic view of politics, promoted a belief in the superiority of military administration, dismissed the political system as unnecessary, and dismantled or disabled public policy in areas associated with the left, including education, the environment, human rights, public health, and foreign policy. According to Avritzer and Rennó, *Bolsonarismo* failed as a government but can continue to destabilize democracy as an oppositional force.

Questions for Further Research

There are at least three areas in which more research on right–wing populism is needed. The first is in understanding the drivers of support for right–wing populist movements, parties, leaders, and governments. The second is in analyzing under what circumstances, why, and how right–wing populist governments dismantle elements of liberal democracy. And given the second, the third is what kinds of anti–right–wing populist politics are most effective.

With regard to the first issue, how material and nonmaterial changes contribute to demands for right–wing populism needs to be more clearly understood. Economic factors and changes in the workplace combine with social and cultural forces, as well as psychological ones, to contribute to the rise of these movements, but the causal mechanisms within and distinctive trajectories of these movements are not always clearly understood. An additional element is the role of digital technology in these movements. Is there an elective affinity between digital media and right–wing populism (Gerbaudo 2018; Zuboff 2019), or are social media platforms tools that can be used well by people of any political persuasion?

The second issue requires empirical work. For example, right–wing populist governments use history to build an identity with supporters, and more insights into this process are needed. The evocation of threats and conspiracy theories, the invocation of a "middle class" ideology of hard work, individual responsibility and opposition to the expansion of welfare state measure, and attacks on "globalism" can all be elements of right–wing populist government, but so can more tangible policies such as social policies, protection for favored industries, and benefits to religious groups. In addition, does right–wing populism veer toward fascism, as some authors claim (Cox and Skidmore-Hess 2022; Finkelstein 2017, xvi–xvii) and, if so, what are the drivers of that process?

Peruzzotti (2022) argues that democratic hybridization takes place when elected populist governments dismantle major elements of liberal constitutionalism. Alter and Zurn (2020) imply that right–wing populism arises as part of a pattern of backlash politics, a distinct form of contentious politics marked by a retrograde aim of returning to a prior social condition and disruptive and transgressive goals and tactics that challenge the establishment. Vieira, Glezer, and Barbosa (2022), examining the first two years of the Bolsonaro administration in Brazil, claim that President Bolsonaro used "infrapolitics," or the use of decrees and administrative regulations, to achieve authoritarian ends, sending him on a collision course with the Federal Supreme Court. And Csaba Gyory and his colleagues are embarking on a major comparative study of the resilience – or not – of the rule of law in the face of various threats, including the instrumentalization of the law by right–wing populist regimes, a practice that elsewhere and in a different context has been called "authoritarian legality."[10]

Finally, what are alternatives to right–wing populism? Lero in this volume recommends a new paradigm for economic development and a proactive

democratic vision. Arato and Cohen argue for "a new version of the welfare state" that can be fought for on domestic and international levels as a means of reducing the rise of inequality of recent decades (Arato and Cohen 2019, 110). Fukuyama (2019, 166) wants the promotion of "creedal national identities built around the foundational ideas of modern liberal democracy" with the use of "public policies to deliberately assimilate newcomers to those identities." There are also fierce debates among scholars about whether left-wing identity politics is a barrier to or accelerant of right-wing populism.[11]

Not all right-wing populisms threaten democracy. And there are other threats to democracy aside from right-wing populism. Right-wing populism can serve as an alert that democracy is not working. At its most pernicious, it is a harbinger of hatred, violence, and authoritarianism. Unless there is a better understanding of the causes of this type of mass-elite politics, its impacts on society and institutions, and its metamorphosis in power, we may be in danger of witnessing continuing de-democratization around the world. This edited volume represents a modest effort to keep that danger at bay.

Notes

1 Hennessy describes Latin American mid-20th century populism as involving the political inclusion of the urban working and middle class. This contrasts with earlier forms of populism. The Russian narodniks of the second half of the 19th century were agrarian populists who believed that a Russian path to socialism was possible through the incorporation of practices of the peasantry such as the mir, the self-governing community that allocated land and other resources to families. The People's Party in the United States in the same period was a small farmer-based party that opposed big finance, the railroad magnates, and urban industrial interests in the name of agrarian grassroots democracy.

2 For examples of the rejection of populism as a concept, see Frank 2020: 2 and 8; Piketty 2020: 962; and Araújo 2021, in the quote that begins this chapter.

3 The weight of ideology in defining right-wing populism is subject to debate. Weyland (2019, 329–330), for example, writes, "It is typical of populism that it lacks ideological definition…Populism's lodestar is opportunism…rightwing parties and movements can only turn populist if they dilute their extremist ideology fundamentally and turn it into a loose, vague mentality."

4 With Collier (2001, 11813) and against Laclau (2018, 117) I see right-wing populism as a type of mass politics rather than a distinctive political logic.

5 The idea of populism with adjectives echoes a similar argument about democracy with adjectives made by Collier and Levitsky (1997).

6 These works argue that nations and nationalism are socially constructed, rather than primordial, and that national identity is often constructed in opposition to an alien and sometimes hostile "other."

7 For a somewhat different book that investigates corruption in the Bolsonaro family, see Dal Piva 2022.

8 This book is coauthored by one of Bolsonaro's sons, the federal deputy Eduardo Bolsonaro. It implies that opponents of Bolsonaro do the work of the devil (Mendes

and Bolsonaro 2022, 22), confirming Arato and Cohen's (2019, 107–108) point about populists' dependence on religious tropes.

9 Although both the cultural backlash and economic losers approaches help orient research in a variety of settings, it does seem that the nature of these causal mechanisms varies significantly across regions and within nations.

10 See the conference Rule of Law, Resilience, and Erosion – The Interplay between Institutional Design and Everyday Practice organized by the Institute for Legal Studies at the Centre for Social Sciences, October 12–14, 2022, Budapest. For an application of the concept of authoritarian legality, see Pereira 2005.

11 Piketty (2020, 961, 965), although he rejects populism as a concept, argues against the "identitarian menace" in its right- and left-wing forms, claiming that class cleavages should take precedence in politics. What he advocates is a focus on the property regime, fiscal, social, and educational systems, and the management of borders in order to reduce economic inequality and strengthen democracy.

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