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# The Great Recession and Party System Change

*Thomas Poguntke/Johannes Schmitt*

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**Institut für Deutsches und  
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und Parteienforschung**

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## INTRODUCTION

This chapter will focus on the political fallout of the Great Recession of 2008/09 and the subsequent economic and financial crisis<sup>1</sup> on a group of EU member states whose political fortunes became closer connected in the wake of the crisis than ever before. This was the result of them being on opposite sides of the defining political conflict of these years, namely the appropriate handling of the economic and financial crisis within the Eurozone. As a result of its sheer size and its strong economy, Germany was largely in the driving seat pushing through austerity measures while the four Southern European countries included in our study (Spain, Italy, Greece, Portugal) had to struggle to varying degrees to meet the strict requirements imposed upon them by the EU. Unsurprisingly, austerity policies are hardly ever popular with large portions of the electorate, and the respective governments had to struggle with increasing popular dissatisfaction and resistance. Similarly, large-scale financial commitments to bolster the economies of weaker EU states are equally unpopular among the populations of ‘donor states’. This is why we focus on the party systems as the essential mechanism of translating changing popular opinions into parliamentary seats and, ultimately, executive power.

More precisely, our main focus will be on the analysis of electoral dynamics in party competition. Therefore we analyse the emergence and success of new parties, their main programmatic features and their effect on established parties and, as a consequence, the functioning of these systems. While Germany experienced fairly moderate effects as a result of the crisis – the growth of the right-wing populist AfD is mainly attributable to the refugee crisis (Lees 2018: 305) –, the party systems of Spain, Italy, and Greece had undergone major upheavals by late 2016. The Greek party system bore only faint resemblance to the seemingly stable two-party pattern before the crisis, the Five-Star-Movement completely changed the format of the Italian party system and the emergence of two new parties (Podemos and Ciudadanos) most likely marks the end of two-party politics in Spain. On the contrary, the Portuguese national party system seemed to be a deviant case. Even though the economic crisis also hit Portugal, the Portuguese party system remained largely unchanged. In contrast to all the other countries included in our study, no new challenger party emerged. Furthermore, Germany seemed to be the expected island of stability in a sea of change but change was as well underway at the subnational level and the right-wing populist AfD finally gained a foothold in the national parliament at the 2017 Bundestag elections.

Following a brief overview of the economic and political developments during the crisis, this chapter will conceptualise party system change and formulate theoretical expectations concerning the effects of the Great Recession on party systems. We argue that such change implies a substantial modification of the government formation process or the competition dynamic. Drawing on the theory of economic voting we relate the effects of the crisis to differential possibilities of voters to sanction incumbent or all established parties. In addition to the mechanisms of accountability, voters’ preferences should explain the differential impact of the crisis. Under certain conditions, the electoral dynamics may lead to a fundamental change of the entire party system. For our analysis, we draw on widely used indicators of party system change such as volatility, fragmentation and polarisation comparing the patterns before and

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<sup>1</sup> Economic and financial crisis and Great Recession are used interchangeably.

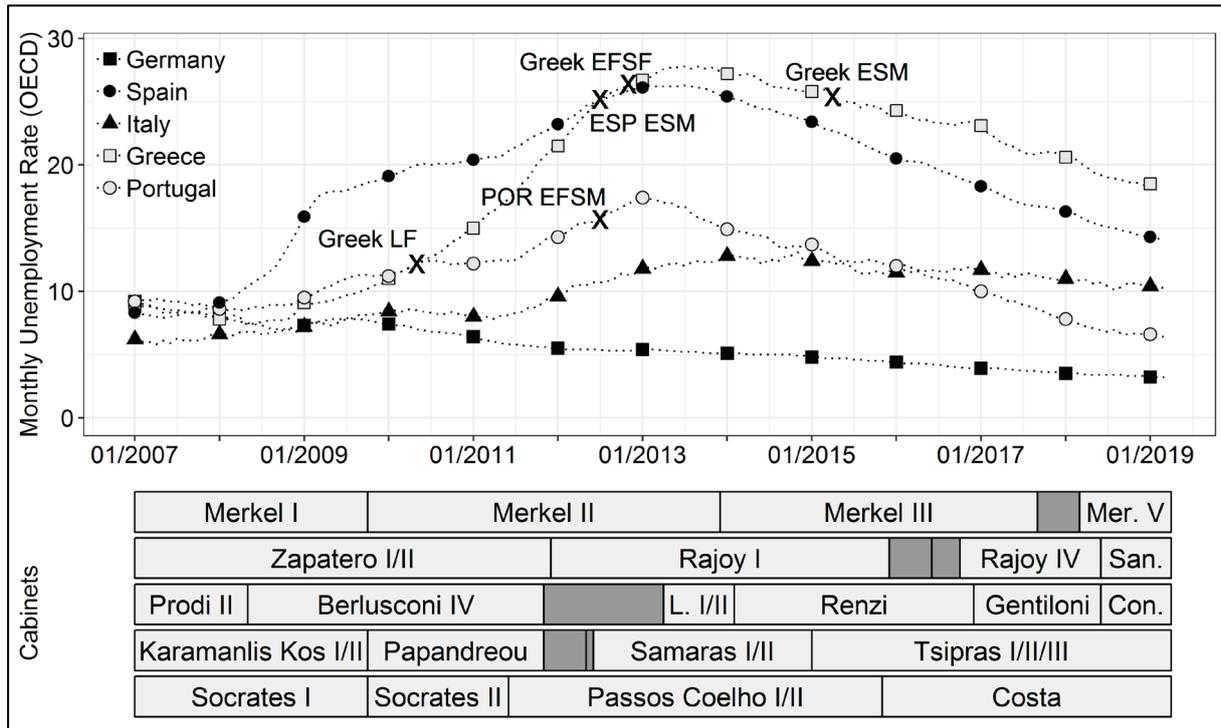
after the beginning of the Great Recession. Interestingly, these three indicators show a high inter-country variance that cannot exclusively be explained by the impact of the crisis. Hence, we provide brief cases studies in order to provide more in-depth reasoning about the causes for different developments. Given the limited number of countries and elections, this chapter will not be a theory testing piece in the strict sense, but we intend to systematically analyse the plausibility of theories on party system change in the light of our data. Particular attention will be given to the role of the sequence of events and corresponding outcomes. Hence, we try to explain the causal link between the two macro-level variables (economic crisis and party system change) by analysing the parties and the competitive situation between them.

In sum, we show that all countries except Portugal have experienced major party system upheaval and that the type of change differs markedly between the Southern countries and Germany. While the Southern party systems have primarily seen the rise of left-wing challengers, a right-wing, populist party with an (initially) neo-liberal economic programme emerged in Germany.

## THE POLITICAL FALLOUT OF THE CRISIS

The story of the economic and financial crisis has already been told countless times. Even though there is substantial dispute over the causes and appropriate remedies, the consequences for the economic development within the Euro countries are beyond controversy. In the aftermath of the global financial crisis, several Euro countries faced threatening illiquidity due to their substantial difficulties to borrow money on the financial markets. In response, the other Euro countries and, in addition, the IWF granted credits within the framework of different (temporal) aid programmes. This support was tied to the implementation of a series of reforms. Most reform 'proposals' – better: requests – included the reduction of bureaucracy, the liberalization of the labour markets and strict austerity measures in order to reduce public debt. As a consequence, several national governments were more or less forced to make unpopular decisions. During this process, these countries were also confronted with substantial recession and a strong growth of unemployment. These unusually dramatic challenges hit national party systems in an age of already declining structural anchorage and eroding partishanship (see, for example Dalton and Wattenberg 2000; van Biezen et al. 2012) and increasing success of new parties (Bolleyer 2013). In addition, shifting cleavage structures with a growing salience of anti-globalization (and hence anti-EU sentiments) (Kriesi et al. 2008) meant that a severe economic crisis related to the EU was almost bound to lead to the rise or strengthening of anti-European, populist political parties. How exactly the long duration of the economic and financial crisis, which has extended over several legislative periods and cabinets, affected the party systems of our five countries and how different trajectories can be explained will be analysed in this chapter.

Figure 1: The Great Recession and cabinets



Cartetaker cabinets are depicted by dark grey. Abbreviations: Con. = Conte, L. = Letta, Pa. = Papademos, San. = Sánchez. Sources: Cabinet data: ParlGov (Döring and Manow 2019); monthly (harmonised) unemployment rate (OECD 2019).

A brief glance at Figure 1 shows a striking contrast between stability in Germany and change in Southern Europe. The first aspect that meets the eye is that the German Chancellor Angela Merkel has remained in office throughout the crisis while all her colleagues lost office. The other main contrast is the development of unemployment figures. They decreased in Germany from 2009 onwards and increased at varying rates elsewhere. Furthermore, all German legislative terms ended regularly. Angela Merkel survived the two ‘Great Recession-elections’ of 2009 and 2013 in office albeit the composition of her government changed from Grand Coalition to a Christian-Liberal coalition and back again, because the liberal FDP lost all seats in 2013. As a matter of fact, Chancellor Merkel managed to secure re-election for a fourth term even though the AfD, initially a profiteur of the Great Recession, turned more pronouncedly towards right-wing populism in the wake of the 2015 refugee crisis.

Developments in Greece and Spain were markedly different. The unemployment rate increased significantly and, especially in Greece, cabinet stability was extremely low. Since 2008, five early elections took place in Greece and eight different cabinets were in office (Döring and Manow 2019). Greece subscribed to three different aid programmes (the Greek Loan Facility, the European Financial Stability Facility and the European Stability Mechanism). Most importantly, both (pre-crisis) major parties, the Panhellenic Socialist Movement (PASOK) and New Democracy (ND) had to negotiate aid packages which required strict austerity measures and were subsequently heavily sanctioned at the polls. First, George Papandreou (PASOK) formed a single-party majority government. Before the early election of 2012 he was already succeeded by Lucas Papademos (independent), who formed the first surplus coalition. After the

second early elections in 2012, Antonis Samaras (ND) formed again a surplus coalition to ensure a majority for the (required) austerity policies. Finally, both major parties lost most of their electoral support in the following early election in 2015. As a result, Alexis Tsipras (Syriza) formed a new cabinet and both pre-crisis established parties were in opposition. The left-wing prime minister had little choice but overseeing the implementation of many austerity measures which eventually allowed Greece to leave the ESM aid programme in 2018. In 2019, New Democracy recovered and won the national elections, resulting in a single-party government led by Kyriakos Mitsotakis.

In Spain, governmental leadership changed between the two major parties in the course of the crisis and the country attempted to avoid asking for financial aid from the EU. Eventually, the conservative Prime Minister Mariano Rajoy had to ask for financial support in 2012. By this time, growing popular dissatisfaction with the performance of the two major parties and the worsening economic situation could no longer be contained within the established party system and the rise of two new parties (Podemos and Ciudadanos) meant that government formation became extremely difficult after the 2015 election. A caretaker government stayed in office beyond an early election in 2016 and it took almost an entire year before a minority government led by the conservative Prime Minister Mariano Rajoy took office in late 2016. Up to this point, single-party majority cabinets had been the rule in post-Franco Spain. Instability continued when the Rajoy government was replaced by a PSOE minority government which in June 2018 under Pedro Sánchez which also did not survive until the end of the following year.

In contrast to the other Southern European countries, Italy had not participated in any aid program until the time of writing (late 2019). Nevertheless, cabinet stability was rather low and unemployment remained noticeably high. Politics in Portugal had already been crisis-ridden before the economic and financial crisis (Magone 2009: 1080-1081). During the Great Recession, the pressure on the Socialist government of José Socrates increased due to growing unemployment and the fiscal deficit (Magone 2011: 1102-1103). As consequence of the missing parliamentary support for Socrates' austerity policy, an election was called in 2011 and rating agencies significantly downgraded Portugal's creditworthiness. Before the election took place, the government already needed to negotiate with the Troika. The Socialist Party (PS) lost the election and the conservative parties (Social Democratic Party and People's Party) formed a majority coalition and received credits from the aid programmes (Magone 2012: 264-267).

This rather rough overview shows a considerable contrast between the political developments of our five countries during the crisis. However, we want to examine these differences in more detail. In particular, we want to investigate whether change took place that is systematically to cross-national differences and similarities. To this end, we first need a clear conceptualisation of party system change.

## CONCEPTUALISING PARTY SYSTEM CHANGE

A party system is commonly defined as a 'system of interactions resulting from inter-party competition' (Sartori 1976: 43). Hence, party system change means a change in the structure

of these interaction patterns (e.g. Mair 1997: 51; Mair 2006: 65), or in the words of Pennings and Lane (1998: 3): 'we speak of party system change when the competitive or cooperative relationships between parties in the electoral, parliamentary or governmental arena are altered.' Such change can be traced back to the components of the system: the parties (Smith 1989: 355). Nevertheless, the emergence of a new party or party change only induces party system change when the government formation process or the competition dynamics are affected by this development (Mair 1997: 52). The government formation function of party systems is one of their defining systemic properties and we will focus throughout our analysis to what extent the Great recession has changed the government formation capacity of party systems.

To identify change within a party system, Mair (2006: 63) differentiates between two strategies and draws attention to one crucial issue: depending on the researcher's strategy, party system change 'is seen as either happening all the time or as scarcely happening at all' (Mair 2006: 63). The first approach relies on typologies or classifications. Therefore, party system change includes a change of the party system type within a defined theoretical framework. Here, the problem may be its rare occurrence. The groundbreaking work of Sartori (1976), for example, is frequently criticised for of the 'overcrowded' type of *moderate pluralism* (Mair 1997: 206).

In contrast, the second approach concentrates on analysing continuous variables of party system properties (Mair 2006: 63-65), e.g. fragmentation, volatility or polarisation. These indicators reveal usually a relatively high variance over time but they represent inevitably only a part of a system's properties and may mislead the evaluation of party system change. The legendary Danish earthquake election of 1973, for example, resulted in a doubling of the number of parties represented in parliament but the patterns of party interaction and the functioning of the party system remained largely unchanged (Mair 2006: 65).

To avoid these problems, we combine both approaches to identify whether the patterns of party competition have changed in the wake of the economic and financial crisis or not. However, before we describe the developments based on both strategies, we outline briefly our theoretical expectations.

## **PARTY SYSTEM CHANGE AND THE ECONOMIC AND FINANCIAL CRISIS**

At first glance, attempts to explain the impact of the economic and financial crisis through general theories may seem pointless, because this event is unique regarding its magnitude and the cross-national interdependencies within the EU. Yet, the examination of the impact of financial crises on political systems has a long tradition in political science studies of electoral dynamics. Referring to the theory of economic voting (Hibbs 1977; Whitten and Palmer 1999), the common theoretical assumption is that voters punish incumbent parties for negative economic developments. Hence, recession should lead to electoral decline of the governing parties. This simple theoretical idea is commonly complemented by further arguments. First, the specific institutional context should matter. Voters can only punish a certain party if the responsibility for a given output is clearly attributable (Powell and Whitten 1993: 398). In consequence, coalition governments may be less affected by economic voting. Thus, we would assume that

the impact of the economic crisis on electoral behaviour should be particularly strong in countries with one-party majority cabinets common in Spain, Greece and Portugal. Second, electoral preferences should matter. Arguably, left-wing voters punish primarily increasing unemployment whereas right-wing voters penalise growing inflation (Whitten and Palmer 1999: 50). Based on these assumptions we expect a particular high electoral loss of governing left-wing parties in Spain and Greece.

Explaining electoral dynamics during the Great Recession of 2007-09 by the economic voting model has proven successful in empirical analyses (e.g. Hernández and Kriesi 2016). However, explaining the poor electoral performance of incumbents does not necessarily explain party system change. For this purpose, it is crucial to clarify how shifts of vote shares between parties result in a change of the overall pattern of party competition. In order to explain this relationship we need to extend the original argument by theorising that a dramatic economic crisis will lead voters to hold not only the current incumbent(s) accountable for their misery. Instead, they are likely to blame all parties that are normal parties of government (Hobolt and Tilley 2016: 972; Hernández and Kriesi 2016: 207), and empirical studies have shown this effect already for the Great Recession (e.g. Hobolt and Tilley 2016: 981). Furthermore, it is plausible to assume that this effect will be less dramatic if some of the popular dissatisfaction can be contained within the party system through a change of government during the crisis, as it has occurred in Spain. However, party system upheaval may only be delayed because the former opposition party will first get a chance alleviate the crisis. If the crisis continues, all established parties will eventually be blamed as has been shown already in analyses of the famous 1973 Danish earthquake election (Borre 1977).

This generalised attribution of responsibility to all established parties and, as a consequence, their electoral sanctioning creates opportunities for specific opposition parties. Anti-establishment parties or challenger parties (Müller-Rommel 1998: 191) are not held responsible for the economic malaise and can offer alternatives for the electorate, not least because they tend to be outside the increasingly constrained 'acceptable' policy consensus (Mair 2000: 48-49; Mair and Thomassen 2010: 27; Mair 2013: 45). The electoral success of these parties influences the pattern of interaction within the process of party competition because the competitive strategies of established and challenger parties differ fundamentally. Due to their low chance of ever gaining government responsibility, the latter can engage in irresponsible opposition by putting forward unrealistic or even unrealizable demands. This so-called 'politics of outbidding' (Sartori 1976: 139) puts the government and other normal parties of government on the defensive in the process of electoral competition.

What kind of anti-establishment opposition can benefit from this competitive situation? Referring to the economic and financial crisis, Hobolt and Tilley (2016: 972) identify different programmatic strategies by left- and right-wing challengers. On the one hand, the left-wing opposition 'reject the austerity agenda and are critical of the EU's insistence on reduced government welfare spending' (ibid.: 972) and, on the other hand, the right-wing opposition stress the importance 'to reclaim national sovereignty, specifically to control immigration and repatriate powers from the EU' (ibid.). Consequently, we can expect different opportunities to pressure the government depending on the specific national developments during the crisis. Especially

the role of the national government (i.e. donor or recipient) within the negotiation of the European aid programmes should matter. Governments of 'recipient' countries should be challenged by an economically left-wing, anti-EU opposition rejecting the imposition of austerity policies. In contrast, 'donor' governments should be confronted with a right-wing opposition, because voters oppose the nationally disadvantageous redistribution.

In sum, we expect two effects based on the theory of economic voting. First, the size of the effect of the economic and financial crisis on the electoral dynamic varies depending on the extent of the national economic downfall (all other factors being equal). A stronger recession should result in a higher electoral loss for the established parties. Furthermore, this effect should be enhanced by a clear responsibility. Second, the political orientations of challenger parties will vary according to the government's role in the crisis. To be sure, this perspective disregards a substantial number of factors related to the specifics of national political systems such as electoral systems and rules of government formation. While giving full attention to them is beyond the scope of this chapter, we will refer to the most relevant aspects in the context of our short case studies in section 6.

Concerning our empirical cases, we would expect the strongest effect of the Great Recession on the party systems in Greece and Spain due to the magnitude of the crisis. A somewhat weaker impact can be theoretically assumed in Portugal and Italy as both countries have been also hit significantly. On the contrary, there was no long-term effect on unemployment in Germany and the country's general economic development was positive. Thus, we expect that the German party system should have remained rather stable - in contrast to developments in the Southern Europe countries.

In addition, we also expect opportunities for different kinds of new challenger parties in the wake of crisis. In Greece, Spain and Portugal, the required austerity policies open up opportunities for challenger parties of the left demanding a strengthening of the welfare state. In Germany, on the other hand, the rise of an economically right-wing opposition party is likely which could criticise financial support for the crisis countries and substantial budgetary risks in conjunction with the rescue packages. Italy falls in between. The country is significantly affected by austerity policies but, up to this point, did not participate in the aid programmes. Thus, a rise of the economic left- and right-wing opposition is possible.

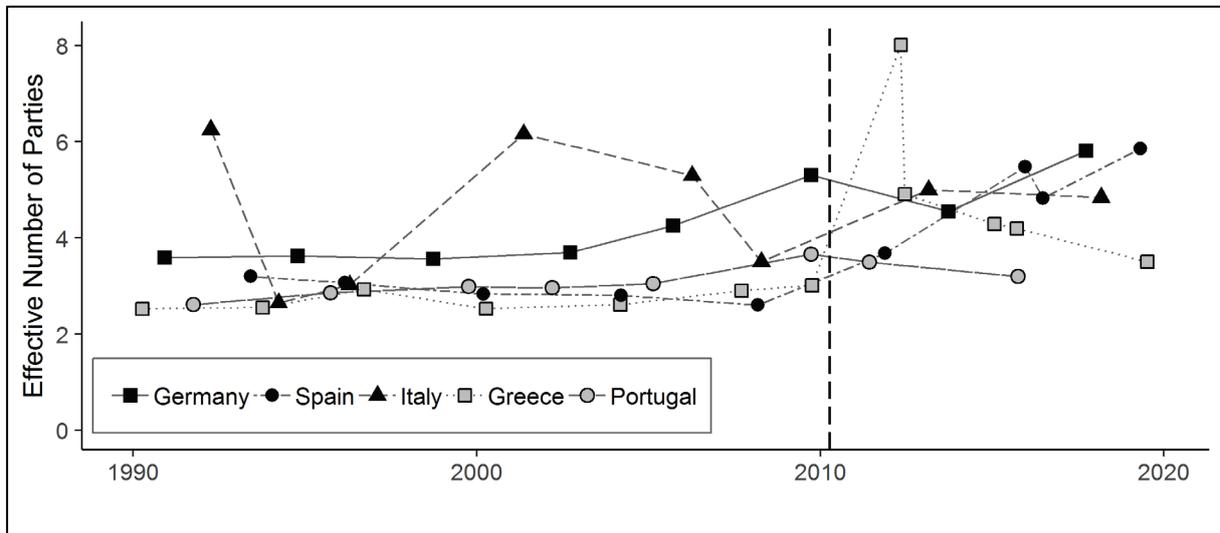
These conceptual and theoretical reflections form the basis of the subsequent analysis. We begin with a comparative analysis of suitable indicators of party system change before we turn to a more detailed investigation of our countries in a comparative case study.

## THE INDICATORS OF PARTY SYSTEM CHANGE IN COMPARISON

We start the analyses with an examination of the established indicators of party systems. Here, we provide a quantitative overview of the party system patterns before and during the crises. This first step helps us to understand the broader setting of the political developments within these five countries even though this review is rather general. Starting with the quantitative description we rely on the widely used standard indicators of fragmentation, left-right polarisation and volatility (Pennings and Lane 1998: 2; Mair 1997: 66-70; Klingemann 2005: 31-49).

Figure 2 shows the number of the effective number of parties in the electorate since 1990. The vertical, dashed line marks the starting point of the first EU aid programme: the Greek Loan Facility (2 May 2010; European Commission 2016).

Figure 2: The fragmentation of the party system\*



\* Effective number of is calculated as follows:  $enp = 1 / \sum_{i=1}^N p_i^2$ ;  $p_i$  = party's vote share (Laakso and Taagepera 1979: 4). Electoral data is based on ParlGov (Döring and Manow 2019).

The data do not reveal an obvious contrast between the Southern countries and Germany when we look for different patterns of change vs. stability. On the contrary, Portugal seems to be the most stable system as the effective number increases only slightly after the 1990s. Furthermore, the party system fragmentation even decreases after the start of the EFSF/EFSM programmes on 4 May 2011. Likewise, there is also no upward trend in Germany until 2017. Here, the effective number rose in the federal elections 2005 and 2009 due to the electoral success of the small parties, e.g. *The Left*, *Greens* and *Free Democratic Party (FDP)*. However, the 2013 election were marked by a modest concentration of the party system. In the following election of 2017, the effective number rose again to over five, which is a similar value as in 2009. Thus, both Germany and Portugal appear to be stable.

In contrast, the other party systems show higher fluidity. First, it comes as no surprise that the Greek party system reveals a remarkably high degree of fragmentation in the first election of 2012. The early election took place after the grand coalition of Lucas Papademos adopted the second bailout package (Mylonas 2013: 89-90). Regardless of the following decrease, the fragmentation remained substantially higher than in the 1990s. The effective number rose from about 2.5 before the crisis to above 4 in 2015. A similar trend on a lower level is observable in Spain. In both countries, our indicator reveals the electoral weakness of the two major parties: PASOK and ND in Greece as well as PP and PSOE in Spain. In Greece, PASOK and ND lost together more than 50 percentage points in comparison to 2004, whereas the PP and PSOE suffered losses of about 30 percentage points. Based on this indicator, we may assume that party system change has taken place primarily in these two countries.

Finally, Italy shows the most complex pattern in that fragmentation fluctuates considerably. Over the years of the Great Recession, the Italian party system shows neither a specifically high

nor low effective number of parties. However, because of shifting party alliances, this indicator may be insufficient to analyse the Italian party system (D'Alimonte 2013). Considering these alliances, we can identify a substantial trend. Up to the election of 2013, two electoral alliances – a centre-left vs. a centre-right alliance – dominated party competition in Italy. For example, both alliances received together above 85 percent of the votes in 2008. The rise of the Five-Star-Movement resulted in a triangular mode of party competition because the new movement cannot really be placed on the left-right continuum. Regarding this fact, we can argue that the Italian party system has become more fragmented.<sup>2</sup>

In addition to fragmentation, polarisation is one of the most widely used indicators for the analysis of party systems (Dalton 2008: 900; Sartori 1976). However, there is a vast number of different operationalizations (Schmitt 2016). In the first instance, the controversy relates to two substantive choices: (1) using range or standard deviation (SD) and (2) how to measure left-right party positions (for a detailed review: Schmitt 2016). As we need current data on our five countries we are left with a choice between two possible left-right indicators:<sup>3</sup> the RILE-index (Mölder 2015) based on the Manifesto Dataset (Volkens et al. 2016) or expert ratings based on the Chapel Hill Expert Survey (CHES: Bakker et al. 2015). We rely on the CHES ratings, because of the rather problematic validity of the RILE index (Mölder 2015; Franzmann 2015: 821). Furthermore, we operationalise polarisation as the ideological range to avoid some pitfalls of the SD indicator (Evans 2002: 170; Schmitt 2016: 8).<sup>4</sup> For checking purposes, we also calculated the left-right polarisation within the electorate based on the European Social Survey (ESS 2016). However, we observed rather stable patterns and we did not identify any substantial trend due to the economic and financial crisis. This indicates that party system polarisation is not simply the result of changes within the electorate. Figure 3 shows the ideological dynamics within the five party systems.

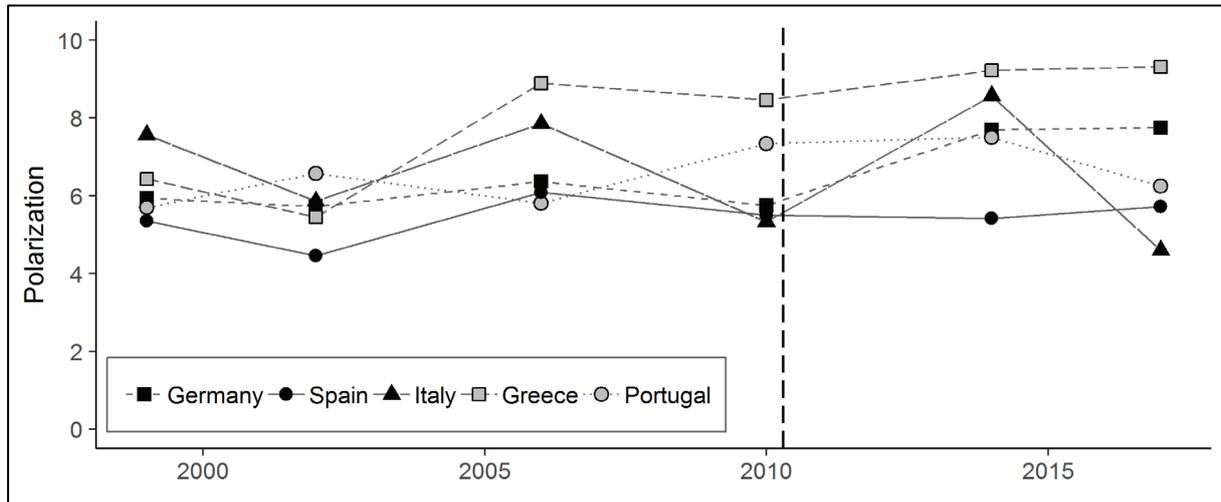
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<sup>2</sup> To a substantial degree, however, the bi-polar pattern of party competition preceding the rise of the Five-Star-Movement was facilitated through consecutive reforms of the electoral system (for details see Katz 2000; Bardi 2007).

<sup>3</sup> Alternative measurements based on MARPOR data (e.g. Franzmann and Kaiser 2006; Jahn 2011) or on survey data (e.g. Comparative Study of Electoral Systems) do not provide enough data.

<sup>4</sup> Range does not take the strength of the extreme parties into account. We also calculate the unweighted and vote share weighted standard deviation to check the robustness. The unweighted SD reveals similar trends as range. The major difference is the lower level of polarisation in Germany and Italy. On the contrary, there are substantial disparities between the vote share weighted SD and the range: Referring to the weighted indicator, the polarisation only increases in the Greek party system. In addition, the polarisation decreases in Italy. The other party systems remain rather stable.

Figure 3: Patterns of general left-right polarisation\*<sup>5</sup>



\*Ideological position based on Chapel Hill Expert Survey (CHES: Bakker et. al. 2015). Polarisation is based on the left-right range within the party system. The calculation includes only parties with a vote share same or greater than 2% or, at least, one seat in parliament.

Overall, the picture is one of stability rather than dramatic change. Two countries stand out, Greece, which experienced a sustained increase of polarization before the crisis hit the country, and Italy where fluctuation continued. In Greece, the initial rise of polarisation was due to the electoral success of right-wing *Popular Orthodox Rally* party in the elections of 2007 and 2009. Even though their success was only temporary, the polarisation remained high because of the subsequent electoral success of the right-wing parties *Golden Dawn* and *Independent Hellenes*. Therefore, the crisis seemed to stabilise the already high polarisation in the Greek party system. The relatively sharp increase of polarisation in Italy rests on small electoral gains of the communist party *Civil Revolution* (which passed the 2 per cent threshold of inclusion) and the increasingly right-wing positioning of *Legia Nord*. The subsequent decline rests on the success of the Five-Star Movement, which is indifferent to the general left-right dimension.

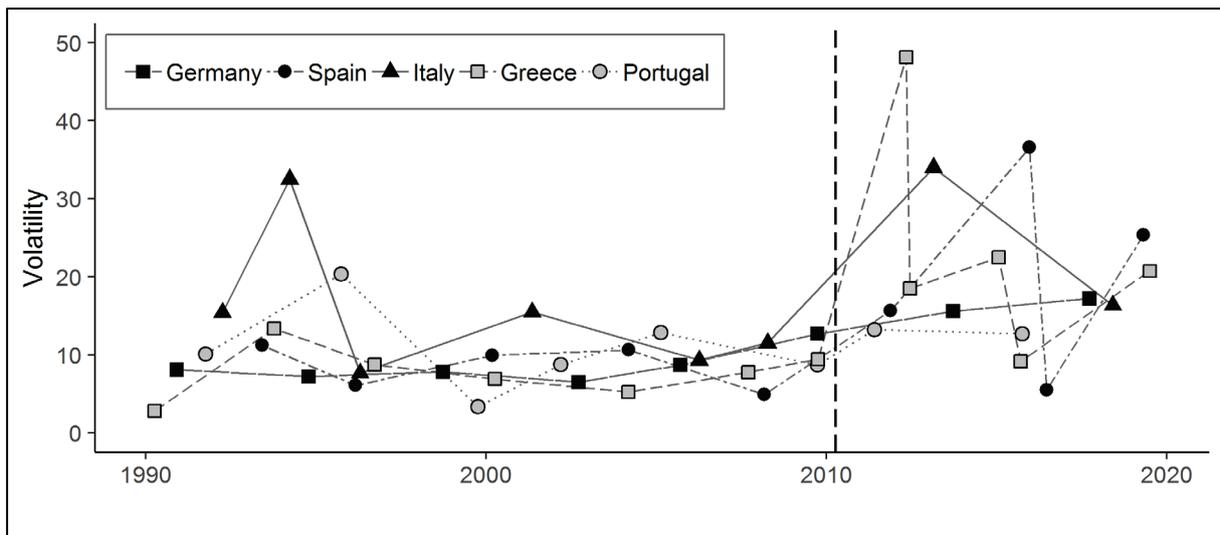
In contrast, Germany is a clear case of rising polarization in response to the crisis as this is a result of the emergence of the right-wing populist party *Alternative for Germany* (AfD; Franzmann 2014: 122-123; Franzmann 2016: 461) during the Great Recession. In Portugal, we observe a similar level of polarisation as in Germany. However, the centrifugal dynamic occurred before the economic and financial crisis. Since 2010, the polarisation has remained relatively stable. The ideological range in Portugal is high due to the left-wing positions of the Communist party and the *Bloc of the Left* in contrast to the other major parties – PS, PSD and CDS-PP.

The Spanish party system, on the other hand, is characterised by rather modest polarisation – before and during the crisis. The absence of a pronounced right-wing party leads to a rather moderate ideological range within the party system. However, the electoral breakthrough of the left-wing challenger party Podemos occurred only in the parliamentary election of 2015. If

<sup>5</sup> While these patterns of left-right polarisation are estimated on the basis of expert data, the picture could change if we use polarization data based on the self-placement of voters on the left right scale. Andreadis and Stavrakakis (2019: 169) showed that polarisation based on voter data increased in Greece.

we include it for the 2014 CHES calculation, the polarisation increases slightly (+0.22). Thus, the Spanish party system reveals contradicting trends – a substantial increase of fragmentation in combination with a stable and moderate polarisation. However, the most recent elections saw the emergence of the far right party Vox - something that is not yet captured by the CHES data.

Figure 4: Alternating volatility before and during the economic and financial crisis\*



\* Volatility is calculated as the summed vote share differences between two elections:  $volatility = \frac{1}{2} * i = \sum_{i=1}^N |p_{i,t} - p_{i,t-1}|$ ; p = party's vote share (Pedersen 1979: 4). The electoral data is based on ParlGov (Döring and Manow 2019). If electoral alliances are present, they are taken in account. Therefore, the vote share of the electoral alliance is compared with the vote share of all parties at the next election that were original part of alliance. Our data on electoral volatility highly correlates ( $r = .95$ ) with the volatility data of Emanuele (2015) and the patterns of variance based on both datasets lead to the same conclusion.

Finally, we examine volatility (Figure 4), which measures voter mobility on an aggregate level (Pedersen 1979: 17; Bartolini and Mair 1990). Here, we can identify two groups: One the one hand, we observe again rather stable patterns in Portugal and Germany. In both countries, voter mobility is somewhat higher during the crisis, but the volatility measure indicates rather moderate shifts in parties' electoral support. Nevertheless, we observe a continuing increase in Germany, which is part of a long-term development towards more party system fluidity in Germany (Niedermayer 2008; Poguntke 2014). On the other hand, there were true 'earthquake elections' during the Great Recession in Greece, Italy, and Spain. Especially the first Greek election in 2012 reveals remarkably high volatility. On the aggregate level, almost every second voter changed his voting choice in comparison to the election 2009. The two major parties - ND and PASOK - lost about 45 percentage points of their vote share. Nevertheless, ND remained in office (Mylonas 2013: 90-92). Even after this ground breaking election, volatility remained relatively high in the next two elections. As a result of these seismic shifts in the Greek party system, Syriza became the strongest party and formed a coalition with the nationalist *Independent Greeks* (ANEL) after the elections 2015. The possibility of such a coalition underlines how fundamentally the Greek party system changed: Syriza held a vote share of below five per cent before the crisis and ANEL is an entirely new party.

This indicates that overall volatility figures can be deceptive because they do not differentiate between volatility that is caused by the entry of new parties and volatility that is attributable to changing electoral returns of established parties (see Figure 4). When we only look on volatility based on new parties (volatility of type A, Powell and Tucker 2015: 126-127), we recognise that the increase in volatility is mainly caused by the entry of new competitors. This dynamic especially concerns Spain, Italy and Greece.<sup>6</sup>

In comparison to Greece, the Spanish earthquake election in 2015 appears less dramatic. Nevertheless, a volatility of more than 35 indicates a very substantial shift within the party system, which materialised in the success of the new parties Podemos and Ciudadanos. In contrast, both major parties, the Spanish Socialist Workers Party (PSOE) and the People's Party (PP), who had dominated the party system since democratization, fell below 30 per cent. Volatility receded in the subsequent early election of 2016, as the new parties had consolidated themselves but rose again in 2019 elections which indicates that the stability of the Spanish party systems has been substantially weakened. In Italy, the remarkable observation is that the volatility in the general election 2013 is even higher than 1994 – the earthquake election after the end of *Christian Democracy* party and the electoral reform which marked the end of the so-called first republic (Bartolini et al. 2004; Newell and Bull 1997). This shift in electoral support includes especially a substantial loss of Berlusconi's governing electoral alliance and the Democratic Party<sup>7</sup>, which was the largest opposition party, in combination with a remarkable gain of new Five-Star-Movement which came from nowhere to being the largest party in the country (D'Alimonte 2013; Bordignon and Ceccarini 2013; De Petris and Poguntke 2015).

To summarise, the indicators depict a rather ambiguous picture. Referring to the question of party system change due to crisis, the only clear case seems to be Greece. Here all indicators show the same trend. We see increasing fragmentation and polarisation. Furthermore, volatility reaches a very high level in 2012 and 2015. Thus, we would suggest that the crisis lead to a substantial change in the Greek party system. In contrast, developments in the other countries are fuzzier. First, Germany and Portugal seem to be rather stable. Nevertheless, we also observe some change during the Great Recession in these countries. Volatility and the ideological range increase slightly.

In Italy and Spain, we find an earthquake election with remarkably high volatility. Nevertheless, the Spanish party system remains rather moderately polarised and the fragmentation in Italy is difficult to interpret due to the peculiar role of the Five-Star-Movement. Hence, the initial question remains partially unanswered. Therefore, we analyse the party competition case-by-case and describe differences and similarities.

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<sup>6</sup> The proportion of the volatility based on the entry of new and the exit of old parties is as follows: (1) over 32 percent in the Greek election of 2012, (2) almost 80 percent in the Spanish election of 2015 and (3) over 85 percent in the Italian election of 2013.

<sup>7</sup> The Democratic Party lost more than eight percentage points and the centre-right coalition lost nearly twenty percentage points.

## THE CRISIS, THE EARTHQUAKES, AND THEIR VARYING IMPACT

To be sure, looking at general trends always risks missing the peculiarities of individual cases and the impact of specific institutional factors. Above all, the sequence of events matters considerably for party system change. Therefore, we examine the five party systems separately in this section and sketch out the general sequence of events and their consequences. Our analyses show that some of our indicators for party system change may sometimes be misleading as they cannot always fully capture the complexity of the underlying processes. In addition to newspaper analyses, we rely on the parliaments and governments database (Döring and Manow 2019) and the EJPR Political Data Yearbooks (2008-2015).

### Germany

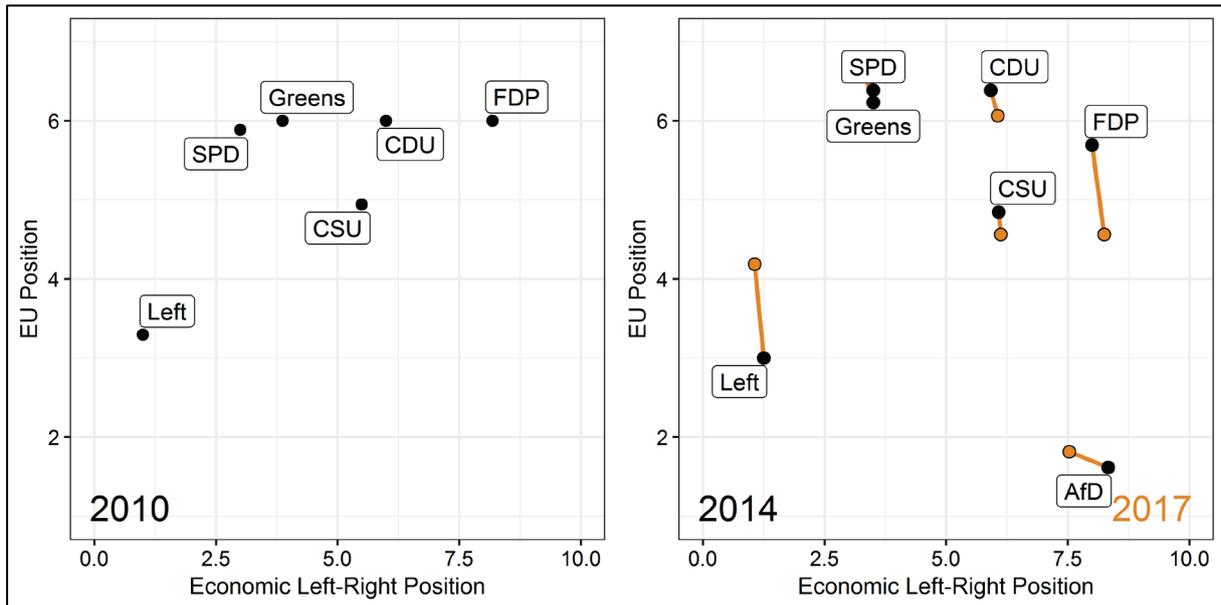
Germany is an example of the limitations of quantitative indicators such as volatility and party system fragmentation as they do not capture necessarily the inherent mechanics of party competition. While these indicators show no major upheavals in the German party system, a closer inspection of the developments of German party politics over the 2010s reveals that a major party system change is underway. For the first time in more than half a century, a new party to the right of Christian Democracy managed to gain a foothold in the Germany party system. The right-wing populist AfD won seats in all Land elections since 2014 and, finally achieved Bundestag representation in the 2017 elections with 94 seats (12.6 % of the popular vote). Founded shortly before the 2013 Bundestag elections as an initially neo-liberal Eurosceptic right-wing party, the AfD gained a second, much stronger life in the wake of the refugee crisis which reached its peak in the second half of 2015. After many of the neo-liberal founding members left the party in 2015 over a conflict over policy and, equally important, personality, the party moved somewhat further to the right, increasingly emphasising the immigration issue and mobilising on islamophobia.

Yet, as Figure 5 shows, the emergence of the AfD does not significantly influence economic left-right<sup>8</sup> polarisation, because the party is hardly to the right of the liberal FDP in this regard. However, true party system change can be found on the second dimension in Figure 5. The AfD is clearly far apart from all other parties except the Left when it comes to European integration and it would be in a world of its own on immigration and traditional conservative values (no data shown).

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<sup>8</sup> In the CHES expert survey (Bakker et al. 2015) three type of left-right measurement are measured: General left-right position, economic left-right position - codebook description: "Parties on the economic left want government to play an active role in the economy. Parties on the economic right emphasise a reduced economic role for government [...]" (CHES 2016: 19) - and social left-right - codebook description: "'Libertarian' or 'post-materialist' parties favor expanded personal freedoms, for example, access to abortion, active euthanasia, same-sex marriage, or greater democratic participation. 'Traditional' or 'authoritarian' parties often reject these ideas [...]" (CHES 2016: 19).

Figure 5: The economic and financial crisis and the German party competition – the rise of the AfD\*



\* Data based on the CHES Expert Survey (Bakker et al. 2015). CHES measures three kinds of left-right positions: general, economic, GAL-TAN. We exclude following parties of the CHES sample, because of their irrelevance: Pirates, The Animal Protection Party and National Democratic Party of Germany. Party abbreviations: AfD = Alternative for Germany, CDU = Christian Democratic Union of Germany, CSU = Christian Social Union, FDP = Free Democratic Party, Greens = Alliance '90/The Greens, Left = The Left, SPD = Social Democratic Party of Germany.

In sum, the success of the AfD confirms partially our expectation that the economic and financial crisis is likely to facilitate the rise of a right-wing Eurosceptic party. The Great Recession clearly triggered the formation of the AfD and it was the most important issue during the initial phase of the party's success. However, our expectations are not fully confirmed, because the success of the AfD can be traced back to the emphasis on other political themes and general developments within party competition - regardless of the economic and financial crisis. Arguably, the rise of the AfD is as much a result of a substantial 'modernization' of the CDU and, more unwillingly, also the CSU that was initiated by the Chancellor Angela Merkel and her political allies. This programmatic re-orientation included a substantial shift towards the centre on a range of social issues including minority rights, childcare and immigration and opened up substantial political space to the right of Christian Democracy. The Great Recession offered a suitable issue for mobilization, but Euroscepticism was not the only relevant issue that was not covered by the established parties. The refugee crisis provided a second momentum for a party that includes right-wing populist, national-conservative and, to a lesser degree, right-wing extremist positions.

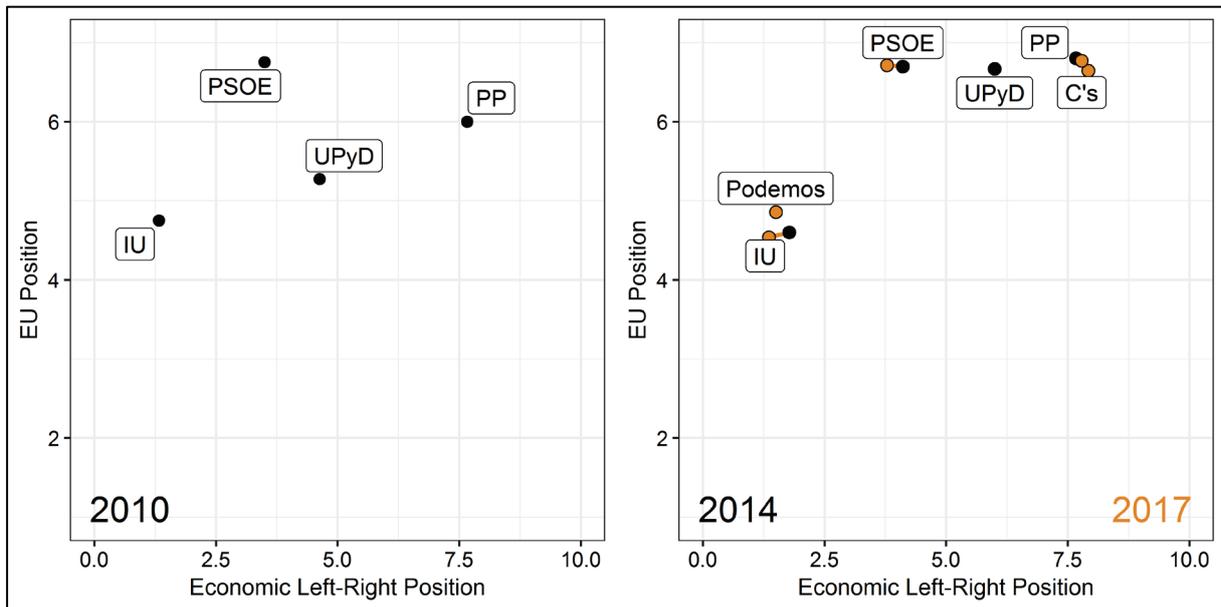
The emergence of an anti-establishment party to the right of Christian Democracy has already begun to change the pattern of party competition and coalition building at the *Land* level in that two-party coalitions are increasingly unlikely and that there is a growing need to resort to new coalition formulae such as Christian-Green or CDU-SPD-Green governments. The AfD has accelerated a development that was already underway before, namely the absence of clear governmental alternatives before election day (Poguntke 2011). If the success of the AfD persists, a lasting change of the party system is very likely.

### Spain

Spain appears to be a classic example of how dissent can first be contained within the party system through government alternation but eventually leads to major change because the new government is constrained to continue the policies of the previous one. Yet, a closer examination of the Spanish case suggests that party system change has so far mainly been caused by problems of the established Spanish parties such as corruption and weak leadership.

Prime Minister Mariano Rajoy of the conservative People’s Party took over in late 2011 from Socialist Prime Minister Zapatero who had initiated major austerity policies in order to avoid that Spain would need to seek help from the ESM. As the crisis continued under Rajoy’s reign, the traditionally stable Spanish party system began to disintegrate and two major new parties broke through in the 2015 elections, the left-wing Podemos and the centrist Ciudadanos (C). This has fundamentally transformed the mechanics of the previously stable party system, as was exemplified by an early election in June 2016 and the longest ever government formation process which lasted 314 days before the caretaker government of Rajoy was succeeded by a minority government led by him in October 2016. Most significantly, the formerly dominant parties of left and right, PP and PSOE polled just about 50 per cent in the 2015 and 2016 elections.

Figure 6: The economic and financial crisis and Spanish party competition – also a home grown crisis



\* Data based on the CHES Expert Survey (Bakker et al. 2015). Party abbreviations: C’s = Party of the Citizenry, IU = United Left, Podemos = Podemos, PP = People’s Party, PSOE = Spanish Socialist Workers’ Party, UPyD = Union, Progress, and Democracy. Smaller and regional parties were excluded. These parties are: Basque Nationalist Party, Basque Solidarity, Republican Left of Catalonia, Galician Nationalist Bloc, Coalicion Canaria, Aragonese Council, Coalition for Europe, Europe of the Peoples-Greens, Amaiur.

A brief look at Figure 6 shows that Spain stands apart from the other countries in our study in that the economic and financial crisis did not give rise to anti-European opposition. On the contrary, Ciudadanos emphasise their explicit pro-EU position with the slogan: “Catalonia is

my homeland, Spain is my country and Europe is our future”.<sup>9</sup> This is a clear indication that much of the party system crisis is home grown and is as much about the inability of the established parties to solve their leadership and, above all, corruption problems as it is about austerity. However, it is plausible to expect that a continuation of the economic malaise might eventually lead to a movement of some parties towards the anti-European pole. In fact, the right-wing populist Vox first won national representation in the 2019 elections but the left-wing Podemos which is, at least in rhetoric, anti-capitalist and maintains close ties with the Greek SYRIZA might be also be tempted to adopt Eurosceptic positions.

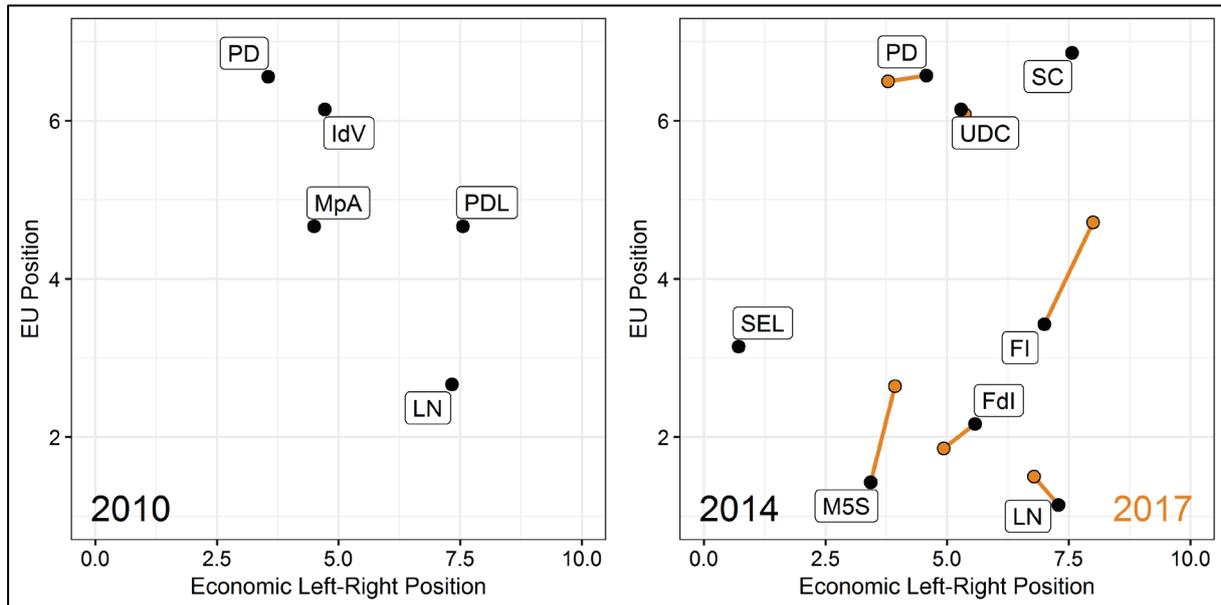
## Italy

Throughout the economic and financial crisis Italy has occupied a dual role. As an automatic result of the size of its economy, the country is one of the major contributors to the various Euro rescue mechanisms. At the same time, Italy is one of the countries whose membership of the Euro zone was doubtful from the beginning because high public deficits are endemic. At the height of the Great Recession the Berlusconi government was effectively forced out of office by massive pressure from the major European governments in November 2011. It was replaced by a technical government led by the economist and former EU Commissioner Mario Monti who initiated substantial reforms aimed at reducing the public deficit. The debate over these austerity measures played an important role in the 2013 election campaign which ended with the unexpected victory of the Five-Star-Movement which had never competed in a national election before (D’Alimonte 2013). The movement led by the comedian Beppe Grillo remained truthful to its pledge not to join any coalition which made government formation very difficult. In the end, Democrat Enrico Letta formed a government which also included ministers from Berlusconi’s PDL. The party system experienced another major upheaval at the 2017 election which led to a victory of the Five-Star-Movement and the subsequent formation of a coalition government between the far right Lega Nord and the Five-Star-Movement under the nonpartisan Prime Minister Conte which lasted little more than a year before the Lega Nord left the government and was replaced by the centre-left Democrats.

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<sup>9</sup> Washington Post 2014 ([https://www.washingtonpost.com/opinions/global-opinions/has-europe-found-an-antidote-to-authoritarianism/2016/10/14/fb2f0692-916d-11e6-9c52-0b10449e33c4\\_story.html?utm\\_term=.84f8e72aba8c](https://www.washingtonpost.com/opinions/global-opinions/has-europe-found-an-antidote-to-authoritarianism/2016/10/14/fb2f0692-916d-11e6-9c52-0b10449e33c4_story.html?utm_term=.84f8e72aba8c), last accessed 20 December, 2016).

Figure 7: The economic and financial crisis and Italian party competition – the surge of anti-EU sentiment\*



\* Data based on the CHES Expert Survey (Bakker et al. 2015). Party abbreviations: AN = National Alliance, CD = Democratic Centre, Fdl = Brothers of Italy, FI = Forward Italy, IdV = Italy of Values, LN = Northern League, M5S = Five Star Movement, MpA = Movement for Autonomies, PD = Democratic Party, PDL = The People of Freedom, SC = Civic Choice, SEL = Left Ecology Freedom, SL = Left and Freedom, UDC = Union of Christian and Centre Democrats.

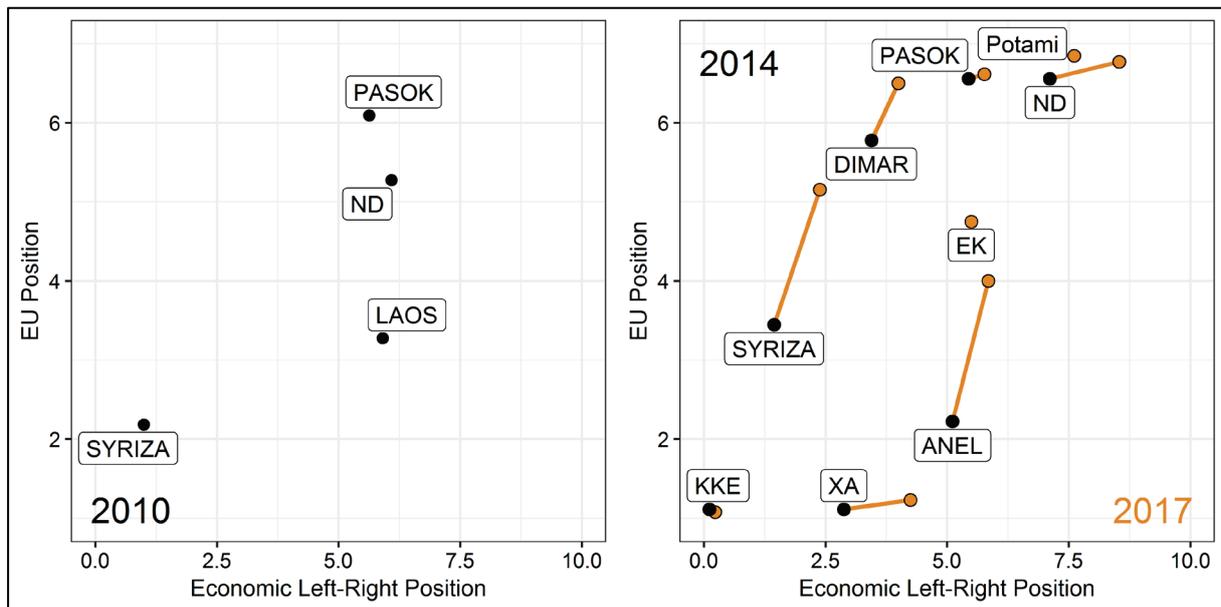
A brief glance at Figure 7 shows the fundamental transformation of the mode of party competition in Italy. The party system of the EU founding member has now a fully-fledged anti-European segment which spans the economic left-right spectrum. As a matter of fact, while the parties are fairly close together in economic terms, they are wide apart on the European issue. This is particularly true for the Lega Nord (LN), which has moved towards a very pronounced anti-European position. Also, Berlusconi's re-launched Forza Italia is now clearly apart from the other more moderate parties on the European dimension. To be sure, the data needs to be read with caution as the permanent re-arranging of Italian parties means that party positions are also being re-arranged. Above all, the ideology of the Five-Star-Movement has remained an enigma of sorts. Yet, its Eurosceptic positions are beyond doubt while not entirely set in stone regarding its radicalism. Again, our expectations are confirmed in that the economic and financial crisis is associated with a substantial growth of anti-EU forces across much of the economic left-right spectrum which can be interpreted as a reaction to dual role of Italy in the crisis. There is also a parallel with the German case in that the 2017 election was also strongly influenced by the refugee crisis and both, the Five-Star Movement and the Lega Nord benefitted electorally from taking a tough line on immigration (Garzia 2019: 672, 678).

### Greece

There can be little doubt that Greece has been hit hardest by the Great Recession. As a result, the traditional party system has undergone major change. In line with our expectation that parties of the Left should bear most of the brunt of austerity policies imposed by the EU, PASOK was all but wiped out and essentially replaced by the economically radical and clearly

Eurosceptic left-wing alliance SYRIZA. Figure 8 also shows that the right-wing nationalist Golden Dawn also fits this pattern in that it is anti-European and economically left-wing. So far, SYRIZA was the only left-wing challenger party to assume governmental leadership. We can clearly see that the politics of outbidding necessarily reached its limits once a party was in government and could no longer promise things it did not expect to have to deliver (Sartori 1976: 138). Caught between a strong anti-EU rhetoric and the need to avoid being forced out of the Euro-zone, SYRIZA eventually moderated its anti-European position somewhat but remained clearly to the left of PASOK in economic terms.

Figure 8: The economic and financial crisis and the Greek party competition – PASOK: Going, going, .... gone?\*



\* Data based on the CHES Expert Survey (Bakker et al. 2015). We exclude following parties of the CHES sample, because of their irrelevance: Ecologist Greens, Democratic Social Movement and Popular Orthodox Rally (LAOS, excluded only 2014 because of their electoral performance in 2012 and 2015). Party abbreviations: ANEL = Independent Greeks, DIMAR = Democratic Left, EK = Union of Centrists, KKE = Communist Party of Greece, LAOS = Popular Orthodox Rally, ND = New Democracy, PASOK = Panhellenic Socialist Movement, Potami = The River, SYRIZA = Coalition of the Radical Left, XA = Golden Dawn.

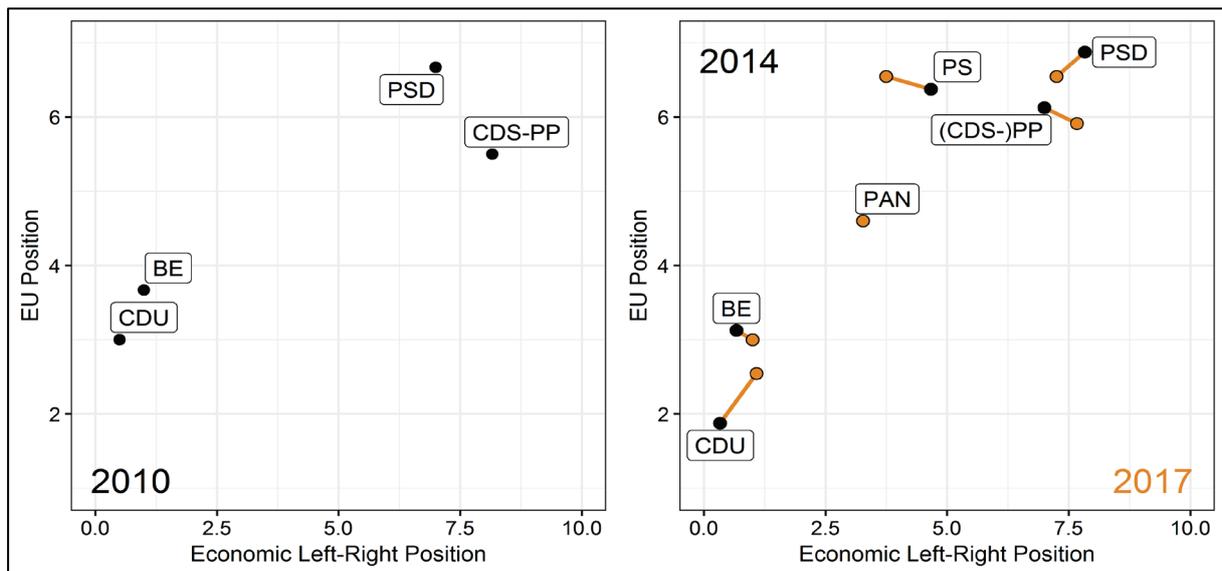
When it comes to party systems dynamics, SYRIZA has effectively replaced PASOK which was reduced to a minor party, polling less than 5 per cent of the national vote in the second 2015 election. In line with our theoretical argument, the other major party of the pre-crisis party system has fared much better: The moderate right-wing ND has largely maintained its position and was eventually returned to government. Overall, Figure 6 clearly shows a major change in the party system. The number of relevant parties has risen from 5 to 8 and this included two pro-European forces (DIMAR, Potami) that compete with the traditional parties. As a result, one-party governments, which had been prevalent since democratization, have become unlikely since the economic and financial crisis. Above all, the Eurosceptic space is now populated by several parties including the leading party of government. Given the overriding policy constraints emanating from membership in the Euro-zone, these parties are highly unlikely to practice what they preach – the ‘outcome’ of the 2015 referendum on the rescue package is a clear case in point. In the long run, this is could have severe consequences for the legitimacy of

democratic governance. Yet, the 2017 CHES data indicates that SYRIZA has substantially softened its Eurosceptic stance thereby narrowing this risky gap between rhetoric and actual policies. Still, it had to pay a high electoral price and lost the 2019 election.

**Portugal**

Portugal has been crisis-ridden long before the Great Recession hit the country. Arguably, the austerity measures following the bail-out of 2011 came therefore less as a shock for the electorate. Probably more importantly, the package was negotiated by the Socialist minority government but was eventually also backed by the major centre-right parties PSD and CDS-PP. In the first instance, however, the Socialist government could not rely on a legislative majority during the negotiations with the Troika. Hence, early elections became necessary in 2011 where the PS lost votes because of the unpopular negotiations and the economic difficulties. The established centre-right parties obtained a stable majority and finally approved of the austerity measures requested by the Troika. Initially, the anti-EU opposition benefitted from the upcoming crisis. Especially, the traditional left-wing opposition party Bloc of the Left won some electoral support in the first national crisis election of 2009. However, this support stagnated on a relatively low level (about 10 per cent) in the following elections of 2011 and 2015. Hence, traditional cabinet types were still possible and, in contrast to Italy and Greece, cabinet stability was relatively high during the economic and financial crisis. Overall, the established parties survived the crisis relatively unscathed and the party system continued to facilitate government alternation. In the election 2015, the established parties (PS, PP and PSD), which continued to emphasise pro-EU positions, still achieved a vote share above 73 per cent and a seat share above 83 per cent. Afterwards, the Socialist Party took over from the centre-right and formed a single-party, minority government, which is a common cabinet format in Portugal.

Figure 9: The economic and financial crisis and Portuguese party competition – contained within the system\*



\* Data based on the CHES Expert Survey (Bakker et al. 2015). Party abbreviations: BE = Left Bloc, CDU = Democratic Unitarian Coalition, PAN = People-Animals-Nature, (CDS-)PP = (Democratic and Social Center -) People’s Party, PS = Socialist Party, PSD = Social Democratic Party.

Overall, the Portuguese party system has been remarkably stable throughout the crisis years. No successful new party emerged and most of the anti-austerity opposition could be contained within the established party system. Figure 9 shows, however, that the left-wing CDU and BE, which moderately gained votes during the economic and financial crisis, accentuated their anti-EU stance.

## CONCLUSION

Our study of the party systems of Germany on the one hand and the four Southern European nations Spain, Italy, Greece and Portugal on the other has shown somewhat unexpected patterns of party system change. Four party systems have experienced major change. However, the island of stability is not Germany but Portugal. To be sure, much more intricate analyses would be required to conclusively establish the exact contribution of the economic and financial crisis to the changes that have been described above. After all, change is a constant feature of party politics and it is by no means trivial to apportion the share of the economic and financial crisis exactly. Yet, prima facie evidence suggests that the impact of the European crisis has been substantial. Four of our cases fit our theoretical expectations: Germany has experienced the rise of a right-wing Eurosceptic party; the Greek party system has been transformed fundamentally through the rise of the left-wing, Eurosceptic SYRIZA; Italy, which is also a major EU contributor, has seen a major shift towards Eurosceptic parties across the left-right spectrum, while Portugal has undergone only moderate changes albeit in the expected direction. Spain is so far exceptional in that none of the significant parties has taken up anti-European positions. However, this can be explained by major home grown problems of the former dominant parties which have allowed challenger parties to remain within the pro-European consensus of Spanish politics.

To be sure, all our cases cannot be fully understood without reference to domestic peculiarities. The German AfD, for example, has benefitted from the move of the CDU towards the centre and the refugee crisis; the Five-Star-Movement has thrived on the general and long-grown dissatisfaction of the Italian public with the *classe politica*; and the established Portuguese parties might have been protected by the very fact that economic problems have been present for so long that the Great Recession did not represent a major shock to the system. Nevertheless, the crisis seems to have worked as a powerful trigger paving way for new parties within their specific national contexts. This crisis and the associated economic malaise event and the following economic downfall weakened the established parties because of their unpopular policies. Yet, the more deeply rooted causes of the continued success of challenger parties may rest more upon path dependent developments and characteristics of national party competition. Furthermore, our study suggests that this trigger works differently in the Southern countries and Germany due to their different roles within the economic and financial crisis. The electoral success of the right-wing AfD contrasts with the rise of the left in Spain, Italy, Greece, and, to a lesser extent, in Portugal.

In sum, our analysis provides substantial evidence to support our theoretical expectations in that the strength of the Great Recession is associated with the magnitude of party system change and that austerity policies tend to hit left-wing parties harder than their right-wing

competitors. We can also show that the structure of accountability matters. One-party governments are particularly susceptible to electoral punishment. Finally, it is worth noting that the traditional left-right dimension is still clearly relevant despite the growing importance of conflicts over European integration: With the exception of the Italian Five-Star-Movement all new parties can easily be situated on the economic left-right dimension. Most importantly, however, the economic and financial crisis has not only pitted the formerly close friends in Southern Europe against the German hegemon. It has also positioned growing segments of European electorates against a European Union that continues to seem incapable of moving out of its economic and political crisis.

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## Zu den Autoren

Prof. Dr. Thomas Poguntke, Chair of Comparative Politics & Co-Director of the Düsseldorf Party Research Institute (PRUF); Heinrich Heine University Düsseldorf.

Dr. Johannes Schmitt is currently in charge of methods and processes in the survey on research and development in the German business sector as well as co-head of the Data Competence Center "SV Data" (SV Wissenschaftsstatistik, Stifterverband). Previously, he conducted research at the Chair of Comparative Politics at Heinrich Heine University and at the Institute for German and International Party Law and Party Research (PRUF) from 2014 to 2020. In his dissertation, he analyzed the polarization of party systems and its causes in international comparison.

## Impressum

Institut für Deutsches und Internationales Parteienrecht und Parteienforschung (PRUF)  
Heinrich-Heine-Universität Düsseldorf | Universitätsstraße 1 | 40225 Düsseldorf

Verantwortlich: Dr. Alexandra Bäcker

Tel.: 0211/81-15722 | E-Mail: [pruf@hhu.de](mailto:pruf@hhu.de) | [www.pruf.de](http://www.pruf.de)