

# Covid-19, Deglobalization and the (Potentially) Bright Future of Radical Right-Wing Populism

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One of the better-known quips appropriate for our current predicament – variously attributed to Mark Twain, Niels Bohr, and the ever-popular Yogi Berra – is the truism that prediction is always difficult, particularly when it concerns the future. This, however, has not prevented social scientists and pundits alike from speculating about the impact of Covid-19 on a post-pandemic world. This is particularly true with regard to one especially pressing question – the future of globalisation. Until covid-19, the benefits of an ever-growing interdependence of the world's economies, cultures, and populations, fed by intensified cross-border trade in goods, services and new technologies, and particularly by massive financial flows were all largely taken as a given. Until recently, globalisation stood for a number of interrelated processes: an accelerated global division of labor, via the “slicing up of the value chain” which turned China into the “factory of the world;” an acceleration of transnational flows of short-term finance, following governments’ lifting of restrictions on capital transfers, which considerably [strengthened the power of capital](#) to the detriment of national governments and labor; and last but not least, an upsurge in international migration, associated with the “[deterritorialization](#)” of culture, including the “loss of the ‘natural’ relation of culture to geographical and social territories”.

Once the pandemic started to fully hit advanced capitalist countries in March 2020, it quickly called into question the major facets of globalization – from trade in components to the power of international finance to constrain national governments to the question of international migration. In some cases, Covid-19 has “helped” accelerate existing trends; in other cases it has led to a reversal of existing trends. The political fallout from these developments is likely to be far-reaching, particularly with regard to the most important challenge facing advanced liberal democracies before the pandemic: populism. Populists, at least in Europe, have consistently been opposed to globalisation. Covid-19 has given them a new lease on life, and they are bound to exploit the new opportunities to mobilise public resentment.

## *Covid-19 and International Trade*

Covid-19 brutally exposed the weaknesses of globalisation, particularly with regard to international trade, particularly its backbone – trade in components. The disruption and partial collapse of global value chains (GVCs) left a large number of companies in advanced capitalist countries short of vital inputs. In Germany, for instance, [McKinsey found](#) that more than 70% of small and medium-sized enterprises (SMEs) were negatively affected by GVC breakdowns and disruptions. At the same time, Covid-19 exposed the dependency of advanced capitalist countries upon “emerging economies” – most notably China – for the supply of critical products, from certain components for drugs to face masks to respirators and the machines necessary to produce them. In [2018, in fact, China](#) provided “43 percent of world imports of face shields, protective garments, mouth-nose-protection equipment, gloves, and goggles”.

The shock of Covid-19 has provoked a major change in mood among the publics of advanced capitalist countries with respect to globalisation. Polls conducted in late spring speak a clear language. There is wide-spread support for a significant slowing down of the process of globalization as there is for “repatriating” the production of vital products, even if it entails higher prices. In Germany, for instance,

in May 2020, 85% of [respondents](#) agreed with the statement that Germany should “return the production of critical infrastructure and essential goods back to Germany, even at the risk of higher costs”. Other surveys documented a significant souring of the population on globalization. In mid-May, less than 40% of respondents thought globalization represented “a chance.” Among supporters of Germany’s radical right, [four out of five](#) thought it represented “a risk”.

At the same time, there was growing public wariness of, and resentment toward, China, hitherto one of the main drivers of globalisation. In late spring and early summer, [polls in various countries](#) revealed the extent to which public opinion had turned negative with respect to China. In Canada, for instance, in July, more than 80% of respondents thought Canada should reduce its dependence on China and diversify to other countries. Almost 40% went so far to support the notion that the country should sever commercial ties with China altogether. At the same time, on the other side of the Atlantic, almost half of [German respondents](#) thought the country should cultivate a greater distance to China. Throughout Western Europe, public opinion supported substantially reducing the dependence on global value chains, particularly in strategic sectors such as health – even if it meant higher prices (see, for instance [here](#) and [here](#)).

#### *From the Global to the Local – Technological Innovation as Facilitator*

For some time now, economists and management consultants have [noted](#), if not outright promoted, a return to local production, even to the detriment of international merchandise trade. With Covid-19, the trend toward “reshoring/onshoring” has gained still further momentum. This is one of the conclusions of the most recent issue of Unctad’s flagship publication, the highly respected [World Investment Report](#). And for good reason. As a leading supply-chain [specialist noted in June 2020](#) with regard to the situation in the United States, “a growing number of organizations see domestic manufacturing as crucial to our economy, public health and national security”. The same holds largely true for Western Europe.

The relocation of production to advanced capitalist countries has been facilitated by the rapid pace of technological innovation. Before the onset of the pandemic, major industry leaders, such as [Tesla](#), in an effort to mitigate supply chain risks, increase flexibility and improve product standards, started to bank on new “Industry 4.0” technologies, such as robots, 3D printing, and smart factories in order to “mitigate supply chain risks, increase flexibility, and improve product standards.” Industry 4.0 production [relies on networks](#) of digitally connected “smart machines” that interact with each other. In the process they generate a wealth of data, which “allow manufacturers to optimize their operations quickly and efficiently by knowing what needs attention” resulting in higher productivity. Automation, digitalisation and robotisation, in turn, have been the driving forces behind the “reindustrialization” of advanced capitalist countries, more often than not promoted by national and transnational institutions like the [European Commission](#). These technological advances have been good for business, less so for labor, particularly those workers who lack the necessary educational background and skills to adapt to the rapidly changing work environment.

To date, manufacturing has relied to a large extent on human labor, domestic and migrant. The 20<sup>th</sup> century “Fordist” model was the basis for a postwar “economic miracle” which elevated a large swath of manual workers into the middle class, especially in war-torn Europe. Today’s reindustrialisation is fundamentally different: highly capital intensive, largely digitalised and automated. This means that

reindustrialisation is unlikely to benefit traditional blue-collar workers. On the contrary, as was the case with offshoring, automation-driven reindustrialisation is particularly detrimental for low-skilled workers performing routine tasks, which are easily robotised. With advances in technological innovation, robots are “increasingly able to perform not only manual and routine cognitive tasks but also non-routine manual and cognitive tasks” (Decker, Fischer and Ott 2017). Expectations are that automation is likely to threaten even skilled workers with unemployment, even if the extent of the impact appears to have been somewhat exaggerated (Arntz, Gregory and Zierahn 2017; Scholl and Hanson 2020). Prospects are different for [high-skilled workers](#). High-skilled workers tend to specialise in tasks “to which automation is complementary, such as robot design and maintenance, supervision, and management”. These developments are likely to lead to further income inequality resulting from a rise in the “skill premium,” socioeconomic divergence and growing anger and resentment provoked by them (Krenz, Prettner and Strulik 2020).

Recent developments in the pattern of global trade make matters even worse. Over the last generation, as trade in manufactures had decelerated, trade in services has picked up speed. Yet until the onset of Covid-19, trade in services lagged considerably behind trade in manufactures. This is likely to change. As a [recent report](#) notes, the “large size of the services sector and relatively large wage differences across countries will provide a vast potential for service-based global integration”. Covid-19 has not only given a major boost to applications that enable teleworking, teleconferencing, and teleteaching; it has also demonstrated the possibilities and benefits of virtual service provision. In the near future, [expectations](#) are that expanded trade in services is largely going to be among high- and middle-income economies that have “complementary high-skill labor endowments, which should make service globalization politically amenable”. Yet in the longer run – barring states instituting artificial legal barriers designed to protect the domestic service sector – even high-skilled professionals are likely to be faced with competitive pressures from emerging and developing economies. It stands to reason that these developments will have serious sociopolitical implications.

### *Diminishing Power? Covid-19 and Financialisation*

International trade creates winners and losers. So does financialisation, the perhaps most important feature of globalisation. The arguably most influential general definition of financialisation was proposed by Gerald A. Epstein’s: “the increasing role of financial motives, financial markets, financial actors and financial institutions in the operation of the domestic and international economies” (Epstein 2005). Financialisation thus refers to the penetration of finance capital into every aspect of national and social life, its assertion of hegemony over productive capital, and its exertion of power over national governments.

At least temporarily, Covid-19 has fundamentally reversed these trends. As the pandemic worsened in spring 2020, national governments throughout advanced capitalist countries started to exert control over various aspects of the economy, spend lavishly to prop up faltering economies, advance measures to subsidise the salaries of those who work, cover the basic needs of those who lost their income and contemplate, if not introduce, barriers to foreign trade and immigration. In short, Covid-19 has marked the return of the “strong state” – a development which would have been deemed out of the question just a few months ago.

There are good reasons to expect these developments to continue beyond the pandemic. For one, even before the pandemic, there was broad-based support for strengthening, expanding and deepening public services and benefits. In fact, an OECD survey from 2018 found that, in most of the countries covered by the survey, there was “clear dissatisfaction with existing social policy” often deemed “inadequate and hard to reach.” Many respondents questioned the system’s fairness, saying they did “not receive their fair share of benefits given the taxes they pay”, and charging that “others get more than they deserve” (OECD 2019, 4). At the same time, there was a strong sense that ordinary citizens had little influence on social policy and wide-spread agreement that the rich should be taxed more in order to support the poor (OECD 2019, 27).

It stands to reason that Covid-19 has added new urgency to these perceptions. In fact, as a recent OECD report notes, given the “unprecedented scale of the crisis,” providing support and benefits to those who most desperately need them is hardly “a short-term challenge” but one that “will require sustained policy efforts over the coming months and, possibly, years” (OECD 2020, 2). In the circumstances, public support for measures that fundamentally break with the neoliberal credo of the past few decades is likely to increase. One of the most striking examples comes from a recent [US poll](#). When asked whether the wealthiest Americans should pay higher taxes, more than 70% agreed. About the same number agreed that corporations should pay higher taxes. When asked whether the resulting tax revenue should be used to reduce poverty in the United States, roughly 90% agreed.

The results of these polls can be interpreted in two ways. On the one hand, large parts of the population in advanced capitalist countries strongly support expanding the coverage provided by social policy. One of the distinct features of the current situation is the fact that the impact of the pandemic has been felt across the income distribution. As a result, members of the middle class, such as professionals, are just [as likely to support](#) the welfare state as are members of the popular classes. On the other hand, widespread dissatisfaction with the welfare state as it is now and equally widespread resentment with regard to the perceived lack of fairness of the extant system provide ideal grounds for radical right-wing populist mobilisation – provided the radical populist right advances credible programmes that genuinely address the concerns of “ordinary people” rather than the rich and powerful, as was the case with the [FPÖ in Austria](#).

#### *Covid-19 and the appeal of welfare chauvinism*

In June 2019, Denmark elected a new parliament. The Social Democrats came out ahead, with roughly a quarter of the vote. The most stunning result of the election, however, was the virtual collapse of the Danish radical populist right (*Dansk Folkeparti*), which lost 21 seats. In the following weeks, the Social Democrats formed a minority government, headed by Mette Fredriksen, via outside support from smaller left-wing parties. One of the reasons for the Social Democrats’ success was the party’s adoption of a hard line on migration, largely lifted from the radical populist right. [Fredriksen justified](#) the party’s position on migrants as a necessary and legitimate measure to defend Denmark’s welfare. Support for the welfare state depends to a large degree on a shared sense of identity and solidarity. Radical right-wing populist leaders, such as France’s Marine Le Pen, have drawn upon this notion to defend their nativist agenda (“our own people first”). As Ulf Hedetoft, a leading Danish expert on migration, [has pointed out](#), Danes have a strong sense of ethnic homogeneity “in opposition to ‘others’”.

Yet the Social Democrats' embracing of an anti-immigrant agenda makes perfect sense, even if it goes against fundamental left-wing principles. Frederiksen was hardly the first prominent Nordic social democrat to raise the question of immigration in the context of the welfare state. As early as 2016, at the height of the refugee crisis, Sweden's social democratic foreign minister, Margot [Wallström](#), [blatantly stated](#) that "most people feel that we cannot maintain a system where perhaps 190,000 people will arrive every year – in the long run, our system will collapse. And that welcome is not going to receive popular support". Given the upsurge of support for the Swedish radical populist right (*Sverigedemokraterna* or Sweden Democrats, SD), largely at the expense of the social democrats, this comment was hardly surprising. It did, however, little to prevent the radical populist right's advance at the polls. In the parliamentary election of 2018, the SD polled more than 17% of the vote, which made it the third largest party.

These two cases suggest, as Brian Burgoon and Matthijs Rooduijn have recently noted, that long before Covid-19, attitudes toward the welfare state were "increasingly tied-up in the politics of immigration" – or what the authors call the "Immigrationization" of welfare politics (Burgoon and Rooduijn 2020, 2). They discuss two competing scenarios. On the one hand, there are concerns that welfare benefits go to the undeserving – such as migrants and refugees, resulting in an anti-solidarity effect, which in turn reduces support for the welfare state. On the other hand, anti-immigrant sentiments fuel concerns about one's own security, which in turn increase support for the welfare state. There is, of course, a solution that might alleviate both concerns – nativism, meaning reserving benefits to the "native-born," what France's *Rassemblement national* has variously referred to as *préférence nationale/priorité nationale*. Tellingly, Marine Le Pen has justified the party's promotion of *priorité nationale* on the grounds that it was the only way to secure solidarity and, by extension, the future of the French welfare state. As [she put it in 2012](#), "One cannot defend our social model while wanting to continue immigration, that's impossible. One cannot welcome one million foreigners in five years and naturalise 160,000 without jeopardizing the equilibrium of our public finances."

With Covid-19, this kind of rhetoric is bound to appeal to a broad swathe of public opinion. In the past, anti-immigrant sentiments were particularly pronounced among the popular classes, as they were most likely to be negatively affected by globalisation. Against that, support for immigration was particularly strong among those employed or generally working in the "non-traded sector" – such as civil servants, socio-cultural specialists, and the members of various professions, such as law, the media, and education (Mayda 2008). Until recently, the middle class had little cause to believe they might have to rely on social welfare benefits. With the acceleration of technological innovation, this is no longer the case. In addition, as the layoffs and pay cuts in the tech industry following the outbreak of Covid-19 has [drastically shown](#), even highly-educated professionals are vulnerable to [sudden shocks](#) to the labor market.

### *Covid-19, Generation Z and the Future of Globalization*

The fallout of the pandemic with respect to individual life chances is particularly dramatic for Generation Z (aka Zoomers), those born between roughly 1995 and 2010, a growing number of whom are now coming of age. As [Matthew Goodwin](#) has noted, the members of this generation "find themselves in a strange position – on the one hand, they are on track to be the most well-educated generation history but, on the other, they are entering the labour market amid one of the most challenging periods in history". Their prospects are dim and unlikely to substantially improve in the near future – with potentially disastrous

consequences. To quote [The Economist](#), economic “misery has a tendency to compound. Low wages now beget low wages later, and meagre pensions after that. The prospect of middle-aged drudgery beckons.” And, as I will show further on, this not only applies to the lower educated.

[American studies](#) suggest that in general Gen Z tends to be more supportive of a stronger, more interventionist state. At the same time, they are noticeably more liberal on a range of issues than previous generations. Above all, its members value diversity. As a study commissioned in [2018 by Deloitte](#) consulting firm stressed, “Gen Z prioritizes diversity — across race, gender, and orientation — more than any other generation”. At the same time, Deloitte pointed out that Zoomers accorded high priority to the safety of stable employment and a stable salary. Covid-19 fundamentally destroyed these aspirations, at least for the time being. According to Deloitte, in April/May 2020, 30% of Zoomers reported having lost their job or having been put on temporary, unpaid leave. Intriguingly, the experience associated with the pandemic appears to have [increased the younger generation’s sensitivities](#) to the needs of others both on the local and global.

One of the defining questions in the near future will be how these dynamics will play themselves out. Given the precarious situation of younger generations (both Gen Z and Millennials) there is a fundamental tension between material circumstances — which favor a strong state protecting social benefits — and liberal-value orientations. This includes progressive views on immigration. Canada is a case in point here. Canada is generally known for welcoming migrants — provided they meet the country’s requirements for admission. Yet already in [2019, a poll](#) found that Canadians were becoming much more skeptical with respect to immigration. Top concerns were that immigrants put too much pressure on public services (60% of respondents) and that they changed Canada in ways the respondents did not like (roughly 50%).

A year later, at the height of the pandemic, Canadians had become still less welcoming, with around 60% of respondents admitting that they felt “less supportive” of immigrants, even those coming from the United States. More than [two thirds](#) thought the country should reduce its intake of migrants. The only exception to the general trend were Zoomers who actually thought Canada needed more immigrants. One important reason was that Zoomers believe that greater ethnic diversity would make Canadians more connected with each other — a belief clearly not shared by the majority of Canada’s population. Yet there are realities which even Zoomers cannot ignore. Like elsewhere, Covid-10-caused unemployment has taken a particularly heavy toll on Canada’s youth. This was hardly surprising given young Canadians were predominately employed in sectors, such as retail and services, which were particularly hard hit by the pandemic. By mid-April youth unemployment surged to over 17%, a result of the loss of [over 320,000 jobs](#) students proved particularly vulnerable, which led [Statistics Canada](#) to warn that many students might face difficulties continuing to pay for their studies.

More generally, a recent study on the impact of recessions on the life chances of Canadian students suggests that college students graduating into a recession face earnings loss that “are very persistent” albeit not necessarily permanent, depending on an individual’s college major and “ability level.” The mechanism accounting for income divergences is straightforward: “recessions initially lead workers to start to work at less attractive employers.” Income gains occur when recent graduates manage to move on to higher paying firms; this, in turn, is more likely for top-ranked graduates. Against that, lower ranked graduates “recover at much slower speeds, if they recover at all, from the initial downgrading to lower paying employers” (Oreopoulos, von Wachter and Heisz 2012, 26). Given the depth of the current public health crisis and given its devastating impact on the economy and the labor market, and here Canada is

no outlier, it stands to reason that there is fertile ground for a pandemic-induced politics of resentment. Such as politics is likely to have extensive potential appeal, even among substantial parts of the highly educated. Theoretically at least, younger people have every reason to support the expansion of the welfare state as well as to demand that benefits accrue first and foremost to naturalised citizens – even at the detriment to the most vulnerable. As a result, welfare chauvinist positions, hitherto primarily associated with the “popular classes,” are bound to resonate among significant sections of the population of advanced liberal democracies.

### *Covid-19, Deglobalization and Populism*

Covid-19 has fundamentally and perhaps fatally – at least for the immediate future – dealt a major blow to globalisation and its promoters and cheerleaders. Although early, this already seems to be the case across several dimensions. It has undermined the notion that “slicing up the value chain” benefits both advanced capitalist and developing countries. The breakdown of global value chains in sensitive sectors, such as health, has drastically demonstrated the pitfalls of a capitalist model that depends on offshoring and outsourcing. While serving the logic of shareholder value, this short-termism has made advanced capitalist countries dependent on, and vulnerable to, disruptive events and processes, exemplified by the recent pandemic. If nothing else, Covid-19 has given a strong boost to those in favor of localising production on national security or public health grounds. It hardly takes a Harvard business degree to surmise that international trade may look very different post-pandemic than it was just a few months ago.

This might also be true with regard to the power of international markets. With Covid-19, global finance has lost much of their hold on national governments. For the moment at least, austerity is out, and stimulus packages are in. In the face of a dramatic surge in unemployment, popular neoliberal tropes, such as the notion of “welfare dependency”, have lost their appeal; instead, there is wide-spread popular support for comprehensive social benefits, no matter how financed. There are good reasons to assume that, this time, the rich will no longer get away with pressuring the political establishment to lower taxes while turning a blind eye to tax avoidance schemes.

Last but not least, Covid-19 has provoked and enabled the reemergence of a strong state, capable of protecting its citizens and willing to accord priority to national community interests over international commitments. In terms of public policy, there is a clear, if perhaps only immediate, winner – the social welfare state – and there is a clear, and potentially long-term, loser: immigration. As the analysis presented above has indicated, the two are intricately tied in with each other. With the pandemic, this link is quite likely to become even more pronounced, at least in public perceptions. And as the Danish case drastically demonstrates, political parties of all colours have already shown themselves perfectly prepared to act upon these perceptions. In the wake of one of the worst economic downturns in recent memory, the notion that charity begins at home is poised to gain growing public support.

What does this mean for the future of radical right-wing populist parties in advanced liberal democracies? In a recent contribution, Mikko Salmela and Christian von Scheve introduced the concept of emotional opportunity structure to explain the success or failure of radical right-wing populism (Salmela and von Scheve 2018). One of the most distinct and widely-noted features of radical right-wing populist politics is its highly “emotionalized” style. Radical right-wing populist actors not only appeal to a range of diffuse emotions, they also “strategically fuel and disseminate” them (Heiss and Matthes 2020, 307). Among the

most prominent of these emotions are anger, anxiety, fear, indignation and, particularly, resentment. In fact, to a large extent, radical right-wing populist politics is a politics of resentment – directed against both those “on top” (“the elite”) and those “below” (such as any socially stigmatized group deemed “undesirable” and/or threatening).

Salmela and von Scheve conceptualise emotional opportunity structures as the “macrosocial eliciting conditions” that favor certain emotions while impeding the generation of others (Salmela and von Scheve 2018, 438). Economic depressions, for instance, are known to have provoked a range of negative emotions, such as fear of social decline, which offer fertile soil for right-wing populist mobilisation. A prime example is Theodor Geiger’s classic analysis of the reasons behind the rise of the Nazis. The study was published three years before the *Machtergreifung* (Hitler’s seizure of power), with the telling title “panic in the middle strata.” (Geiger 1930). Geiger suggested that it was the fear of the middle strata (such as white-collar employees and civil servants) of social decline that fueled support for the Nazis, which Geiger characterised as the “party of the humiliated and insulted (Geiger 1930, 649). Sophisticated statistical analyses have largely debunked Geiger’s middle-class-centered thesis. In line with the work of Thomas Childers they show that the Nazis appealed to a wide range of dissatisfied and disenchanting social groups, including a substantial portion of the middle class (for an exhaustive empirical exploration see King et al. 2008). The Nazis represented a “catch-all-party of protest – with disastrous consequences.

In recent times, it has taken far less than a depression to trigger widespread emotionally intense public responses. Even before the onset of the Covid-19 pandemic, advanced liberal democracies displayed a high level of resentment, providing fertile ground for populist mobilisation. One of the triggers seems to have been the dramatic increase in social inequality. Sarah Engler and David Weisstanner have recently shown, for instance, that rising inequality has had a particularly strong impact on “individuals with middle incomes and high status.” It is among these groups “higher up in the social hierarchy” that growing income inequality fuels RRP support (Engler and Weisstanner 2020, 17). Recent refugee “crises” have only added to the malaise. The dramatic upsurge of the AfD in Germany, to take but one prominent example, owed much to the German government’s decision to admit hundreds of thousands of refugees from Syria within a relatively short period of time. The same holds true for the gains of the radical populist right in Sweden, following the upsurge in the number of refugees in 2015 (Tomson 2020).

With Covid-19, the emotional opportunity structure has potentially become even more favourable to the radical populist right. For one, Covid-19 has revved up existing socioeconomic inequality. As a recent study from the UK put it, in the wake of Covid-19, households “at the bottom of the consumption and income distributions have experienced the largest percentage decline, thereby causing a sharp increase in inequality” (Hacıoğlu Hoke, Känzig and Surico 2020, 2). Secondly, Covid-19 has quite brutally exposed the blind spots of neoliberal doctrine, particularly with respect to the role of the state. Thirdly, Covid-19 has unveiled the snags and pitfalls of the faith in the smooth functioning of global production and assembly networks, largely set up to the benefit of advanced capitalist economies. Fourthly, even if a vaccine should be found and life should return to “normal,” the negative economic fallout of the pandemic is going to persist for years to come. Finally, there is the challenge posed by technological innovation. Accelerated by Covid-19, technological innovation is bound to advance into areas that hitherto were largely sheltered from international competition. In turn, this poses challenges to exactly those social strata recent analysis have identified as particularly susceptible to the siren call of radical right-wing populist rhetoric and discourse.

To be sure, a favourable emotional opportunity structure does not necessarily guarantee success at the polls. In recent years, radical right-wing populist parties have provided ample evidence that they are hardly immune to self-destructive tendencies. The collapse of the Austrian Freedom Party following its leader's more than embarrassing corruption scandal is a prominent case in point. So too are internal power struggles, most recently played out in public by the AfD in Germany, which severely weakened its appeal. Incompetence in office, amply displayed by the Lega in Italy, has also done its part to dampen support for the radical populist right. As has the adoption of their core issues by mainstream parties – as happened in Denmark. In short, the emotional opportunity structure might be highly favourable to the radical populist right; whether or not it will be able to seize the opportunity is an entirely different story.

**This text represents the views of the author only.**

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