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Political representation studies in Portugal before and after the ‘Great Recession’: Legitimation and ideological linkages between voters and their representatives.

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Paper delivered at the 24th IPSA World Congress, 23-28 July, 2016, Poznan, Poland,

Abstract

Although there are some previous studies on the Portuguese Parliament and MPs, namely based on MPs’ biographical files, there is a more recent branch of research on political representation studies since 2008 that is based on candidates to the national parliament (elected and non-elected) or on MPs surveys, and correspondent mass surveys with similar items, that is connected with several international research networks. The purpose of this paper is then threefold. First, the paper will survey this more recent research in terms of the data produced, the methodologies and the major findings. However, due to space limitations, to have a more focused paper and, above all, to be more in tune with the new general orientation of the editorial project about ‘Political representation in Southern Europe and Latin America’, we will focus only upon two major substantive themes, the relations between voters and their representatives in terms of mutual perceptions, political trust, political legitimacy, etc., and the voters-MPs’ congruence along the major ideological (left-right) and issue dimensions (socioeconomic and authoritarian-libertarian issues, attitudes towards the EU), and will try to pinpoint if there are any significant changes after the Great Recession in the legitimization (second objective) and ideological (third objective) linkage functions between voters and their representatives.

Keywords: political representation; Portugal; Great Recession; political legitimacy; political trust; left-right ideology; issue dimensions.

I - Introduction

Although there are some previous studies on the Portuguese Parliament and MPs, namely based on MPs' biographical files (for an overview on this type of studies, see the methodological comparative paper by Xavier Coller et al in the present panel), there is a more recent branch of research on political representation studies since 2008 that is based on candidates to the national parliament (elected and non-elected) or on MPs surveys, and correspondent mass surveys with similar items, that is connected with several international research networks (CCS - *Comparative Candidate Survey*, PARENEL – *Parliamentary Representation at National and European Levels*, INTUNE – *Integrated and United*, PARTIREP – *Party Representation*, and, more recently, a prospective association / collaboration with the PELA – *Parliamentary Elites in Latin America*). Considering this, the purpose of this paper is threefold. First, very briefly the paper will survey this more recent research in terms of the data produced, the methodologies and the major findings. However, due to space limitations, to have a more focused paper and, above all, to be more in tune with the new general orientation of the editorial project about 'Political representation in Southern Europe and Latin America', we will focus only upon two major substantive themes. On the one hand, we examine the relations between voters and their representatives in terms of political trust, political legitimacy and satisfaction with representative democracies, as well as in terms of the role of MPs. On the other, we consider the voters-MPs' congruence along the major ideological (left-right) and issue dimensions (socioeconomic and authoritarian-libertarian issues, and attitudes towards the EU), and will try to pinpoint if there are any significant changes after the Great Recession in the legitimization (second objective) and ideological (third objective) linkage functions between voters and their representatives.

The paper is structured as follows. The next section presents the theoretical framework that has guided empirical research on political representation in Portugal, in particularly highlighting the alleged effects of the economic crisis. Moreover, we briefly describe the characteristics of empirical studies. The third section examines voters' perceptions related to political trust and legitimacy, whereas the fourth section deals with modes of representation and MPs' role. The fifth section analyzes how the voters-MPs' congruence (along the major ideological and issue dimensions) has evolved before (namely in 2008) and after the crisis (namely in 2012-2013). By doing this we will be able to identify if there are any significant changes after the Great Recession in the

legitimation and ideological linkage functions between voters and their representatives. The paper ends by summarizing the major findings and by pinpointing what needs to be done in future research.

II – The study of political representation in Portugal before and after the crisis

Modern liberal democratic regimes have at least four fundamental characteristics. First, they are representative regimes, i.e. they are constituted by *government for the people* and in principle in the interests of the people, but not *government by the people*: elected representatives exercise the power on behalf of the sovereign. Second, modern democracies are (liberal) limited governments, i.e. government actions are limited by the rule of law, by the Constitution and/or the Constitutional framework, by the unalienable and non-usurpable fundamental citizens' rights, and finally their actions are limited by the powers and functions of other institutions: horizontal accountability. Third, modern liberal democratic regimes are democratic because they use free, fair and frequent elections, based on universal adult suffrage, as the fundamental channels to translate the will of people in the policy making process through the elected representatives (see Manin Stokes, and Przeworski, 1999). In any case, beside this institutional framework that underpins any modern liberal democracy, there is a fourth fundamental aspect of modern democracies that cannot be ignored: democratic representative government is by definition government by consent of the people. And that is why it is so important to include the citizenry in the analysis of the functioning of democratic regimes (regime support, political trust, perceptions about the political class, etc.).

The empirical studies on political representation in Portugal have already pointed out some of the pathologies that affect the quality of democracy. First, it has been shown the growing distance between citizens and representatives, for example through the decline of participation or the negative attitudes towards the main political institutions. Second, parties crucially shape the content and character of political representation, and there is a lack of innovation in terms of programmatic orientations. Finally, the accountability process is also undermined due to the lack of accountability and the inability of parties to present (and implement) clearly distinct alternatives.

We know that the crisis has reinforced these trends (Torcal 2014). Yet the analysis of these long-term dynamics may shed more light on causal mechanisms behind it, in particular whether there are linear and deterministic trends or whether there is the possibility of reversal due to political actors' behavior.

We already know that the economic crisis and consequent austerity measures have changed the discourses and practices of the political agents, as well as the channels and intensity of the political participation by individuals in Portugal, Greece and elsewhere (Ponticelli & Voth 2011; Blyth 2013; Freire 2013 and 2016; Freire and Lisi, 2016; Monastiriotis *et al.* 2013; Rüdig & Karyotis 2013 and 2014; Karyotis & Rüdig forthcoming), but with the present review article our focus is with the following. Bearing upon existing political representation studies in Portugal and elsewhere (namely Belchior, 2008, 2010, 2014; Belchior and Freire, 2014; Freire and Belchior, 2013; Freire, Lisi, Andreadis, and Viegas, 2014; Freire, Teperoglou, and Moury, 2014; Freire, Tsatsanis, and Lima, 2016; Teixeira, Tsatsanis, and Belchior, 2014 and 2015; Belchior, Tsatsanis, and Teixeira, 2015; Tsatsanis, Freire, and Tsirbas, 2014), besides presenting their major characteristics of these studies (objectives, type of study, international anchoring, methodologies) (objective one), there are two major sets of questions to be answered by this present study (objectives two and three). First, has the crisis been fostering a decline in mass (specific and diffuse) support for the democracy? Is the Great Recession engendering a major decline in political trust and sympathy for political parties? What are the major perceptions of the Portuguese political elites with regard to the political mandate? Second, how and to what extent have the attitudes of deputies and prospective deputies and their values in respect of the main issue dimensions of political competition (left-right, Europe, socioeconomic issues, immigration, etc.) changed, and are there similar changes apparent within the electorate? Are there signs that the crisis is feeding Euroscepticism in Portugal at the mass level, encouraging growth of the ‘sleeping giant’? And how does this match with what has been happening at the level of political elites? Are there significant changes in the main issues of party competition and in the structure of ideological spaces? And, for both sets of questions, are there robust proofs (after controlling for other relevant explanatory factors), both at the macro-level and at the individual-level, that the Great Recession is indeed a cause (even if not the only cause, of course) behind those changes? These are the main sets of questions motivating this review article that, above all, relies on existing studies to answer them, and then to conclude we want to pinpoint what is still to be researched concerning these topics, and that we will try to follow those cues in our current project «Crisis, Political Representation and Democratic Renewal: The Portuguese case in the Southern European context» (PTDC/IVC-CPO/3098/2014), coordinated by Freire, Lisi, and Tsatsanis at both CIES-IUL and IPRI-FCSH-UNL, 2016-2019.

This paper is based on reviews of the major findings of previous research about political representation in Portugal, based upon innovative data that was collected before (2008 and 2009) and after (2012-13) the crisis (See Tables 1 and 2 for a synthesis of the major characteristics of those studies)¹. In particular, similar questionnaires were fielded to deputies (and/or non-elected candidates) and voters, including questions related to the current crisis, regime support, political trust, left-right ideology, and issue dimensions of party competition and voter identification². The crises (financial, economic, social and political) we are experiencing, especially in bailed out countries, can be viewed as a ‘quasi-experiment’ to test the effects of ‘earthquake crises’ on democratic political systems in general and on political representation in particular (Freire, Lisi, Andreadis, and Viegas, 2014; Freire, 2016; Freire and Lisi, 2016).

[Tables 1 and 2: about here]

III - The relations between voters and their representatives: trust, legitimization and satisfaction

One would expect that the economic crisis would produce a strong negative effect on the views of Portuguese citizens about the political system, and more specifically about the institutions and politicians that comprise it. However, in order to answer that question appropriately, we first need to revisit some familiar concepts in democratic theory and political culture studies. In particular, there is a need to differentiate between regime legitimacy or ‘diffuse’ political support, discontent or ‘specific’ political support, and political disaffection. First, the concept of diffuse support, elaborated by David Easton (1975, 1976) is closely associated (but not identical) with the concept of regime legitimacy, since the former is broader and includes behavioural as well as attitudinal properties. However, legitimacy lies at the heart of the concept of diffuse support, especially when the object of support is the political regime. Seymour Martin Lipset defined ‘regime legitimacy’ as ‘the capacity of a political system to engender and maintain the belief that existing political institutions are the most appropriate and proper ones for the society’ (Lipset 1983, p. 64). In other words, regime legitimacy exists only when the governed believe a particular system of government is

¹ In both cases, specific questions about the crisis were only included in the 2012-2013 questionnaires, for obvious reasons.

² For more details no methodological aspects see Lima and Silva (2015) and the methodological paper by Coller et. al. (2016).

preferable to all other others from a normative point of view (Teixeira et al, 2014b: 504). Easton famously distinguished between the latter type of political support with what he termed ‘specific’ support. The latter is contingent on perceptions and evaluations of performance and policy outputs. It is thus in sync with the political ebb and flow and prone to short-term fluctuations (Teixeira et al, 2014b: 503). Specific political support is also conceptually similar to the notion of ‘discontent’ advanced by Montero, Gunther and Torcal (1997) - which is differentiated from democratic legitimacy – in the sense that the former is largely independent from evaluations as to whether democracy is superior as a regime to its alternatives. Instead, ‘discontent’ refers to negative evaluations of the performance of political institutions, of the authorities that occupy them, or of the political outputs of governance, but not necessarily of the regime as a whole (Magalhães 2005: 977). In other words, it is not about support for the regime in the abstract, but in the way it actually functions. The same authors argue that political ‘disaffection’ is a third important concept which should be clearly distinguished from the concepts of democratic legitimacy and discontent or dissatisfaction. Following Di Palma’s (1970) conceptualization, they define it as a sense of estrangement or detachment of citizens from the political system, as a result of which political affairs are seen as distant, unimportant or meaningless. The symptoms of political disaffection include low levels of political interest, efficacy, participation and civic engagement coupled with widespread cynicism concerning the political process and low trust towards political institutions.

Studies trying to ascertain the relationship between voters and attitudes towards the political system in Portugal have generally been careful to examine each of these phenomena separately, generating some interesting findings about the Portuguese case. One of the most consistent observations about Portuguese political culture concerns the high levels of political disaffection, which had existed well before the onset of the crisis. The levels of political disaffection in Portugal have been much closer to the ones observed in the much newer democracies of Eastern Europe than the older consolidated democracies of Western Europe. However, there have been detected signs of a gradual decrease in the levels of political disaffection since the 1980s mostly due to the higher levels of educational attainment among the Portuguese younger generations (Magalhães 2005: 985). As expected, this observed political disaffection appears decoupled from the broader legitimacy of the democratic regime in the country. What Easton termed ‘diffuse’ political support is consistently measured at high levels in Portugal – in the sense that democracy is preferable to other forms of government - and appears unaffected by

short-term economic trends or government performance evaluations (Morlino and Montero 1995; Magalhães 2005). This is a common finding across other European polities and consolidated democracies in general (Norris 1999; Dalton 2004). Most importantly, levels of support for democracy in Portugal (as a preferable form of government relative to non-democratic alternatives) have remained high even after the economic crisis hit the country in 2011 (Teixeira et al. 2014). However, once we start descending the ladder of abstraction, a different picture emerges. Indicators that are associated with the concept of specific support, such as satisfaction with democracy, trust in government, trust in parliament, trust in political parties, had been traditionally low in Portugal compared to other West European countries, but plunged even lower in the aftermath of the economic crisis. Teixeira, Tsatsanis and Belchior (2014a; 2014b) using data from two national surveys³ before and after the onset of the economic crisis (2008 and 2012) found that levels of trust towards institutions declined to a large extent, especially in cases for which trust was relatively high prior to the crisis such as the office of the President. Satisfaction with democracy, as well as levels of trust towards the government and the parliament more than halved comparing the year after the signature of the bailout agreement with 2008. Even trust towards political parties (traditionally very low in Portugal) plunged to new lows. This finding is consistent with the hypothesis that specific support is sensitive to short-term economic factors as well as citizens' assessment of the sitting government and its performance, especially in periods of economic downturns. There have been many studies that have provided confirmatory evidence of this hypothesis at a comparative level (e.g. Norris 1999; Dalton 2004), or in the case of Portugal in particular (Freire & Teixeira 2010; Magalhães 2002).

Perhaps more alarmingly, Teixeira, Tsatsanis and Belchior also found that support for political parties had been reduced at higher levels of abstraction as well. Despite consistent low levels of trust in political parties, they were generally accepted as a 'necessary evil', essential and central to the functioning of the democratic regime. This kind of diffuse support for political parties at the institutional level appeared to take a significant hit after the effects of the economic crisis had become felt in 2012, especially

³ The surveys were fielded as part of two consecutive projects: a) Portuguese Citizens Survey 2008, part of FCT-funded research project 'Portuguese deputies in comparative perspective: Elections, leadership and political representation' (FCT: PTDC/CPO/64469/2006) coordinated by A. Freire and JM Viegas under the auspices of Available online at: <http://er.cies.iscte-iul.pt/>; b) Portuguese Citizens Survey 2012, part of FCT funded research project 'Elections, Leadership and Accountability: Political Representation in Portugal in a Longitudinal and Comparative Perspective' (FCT: 'PTDC/CPJ-CPO/119307/2010') coordinated by A. Freire, JM Viegas and M. Lisi under the auspices of ISCTE-IUL, University Institute of Lisbon, and CIES-IUL.

among the younger and the more educated, indicating that there are signs of rejection of conventional forms of representative democracy among the more dynamic strata of the Portuguese population in favour of more participatory and less intermediated forms (Teixeira et al. 2014a: 12).

More narrowly, in terms of trust in parliament, the central representative institution in all parliamentary democracies, data before the onset of the crisis had shown that the level of trust the Portuguese had in their parliament was generally close to the other Southern European ‘third wave’ democracies (Spain, Greece), lower than the average of Western European countries but very close to countries such as the UK and Italy (which has experienced decline since the 1980s) and higher than Eastern European countries on average. A clear trajectory of decline of trust in parliament since the 1980s is detected, but this is a common feature among most consolidated democracies in the past few decades. In other words, no image of Portuguese exceptionalism emerges in this regard. As Teixeira and Freire argued, the commonly accepted by some commentators and political observers in Portugal claim that one of the distinctive traits of Portuguese political culture is the tendency to devalue and underestimate the parliament does not really hold up to scrutiny (Teixeira & Freire 2010: 26). The decline of trust in parliament after the onset of the economic crisis as captured in the study by Teixeira, Tsatsanis and Belchior again follows the pattern of other indicators of specific support, which have been found time and again to be more sensitive to evaluations of performance and prevailing economic conditions.

Summing up we could say that the profound economic crisis in Portugal has not produced any dramatic effects on the legitimization of the Portuguese political system. The decline in trust towards political institutions, towards both the executive and the legislative branch, as well as lower levels of satisfaction with democracy, reflect a growing discontent and dissatisfaction which does not appear to impact a general preference towards the democratic regime at large. This decline of specific support, even if steeper than usual, was to be expected given the depth of the economic crisis that Portugal has experienced and in some ways it should be seen as the intensification of a widespread cross-national trend. The only question yet to be explored concerns the extent to which the economic crisis will transform the relationship between the Portuguese and their political system. One possibility would be the reversal of the decline of the high levels of political disaffection, which has been the most significant form of Portuguese exceptionalism within the family of western democratic nations (which on flipside makes

full blown legitimization crises less likely); the other possibility, however unlikely, would be that the economic crisis could serve as an exogenous shock that could trigger higher levels of political engagement and mobilization, replacing the trademark apathy, indifference, acquiescence and low political efficacy of the Portuguese electorate. Initial signs, including electoral turnout levels, point towards the first scenario.

IV – Representation in action: modes of representation and the role of representatives

The aim of this section is twofold. On the one hand, we provide evidence of how candidates relate to voters during the campaign, as well as their general vision of how to mobilize their constituencies and act as a channel of intermediation. On the other, we focus on MPs' representative role, emphasizing their attitudes vis-à-vis the political mandate.

According to previous research, candidates focus their campaign on their respective party and they depend heavily on the resources offered by party organizations (Lisi 2013, 2015). Drawing on candidate surveys conducted during the 2009 and 2011 elections, these studies suggest election campaigns in Portugal display a high level of centralization and that prospective deputies mainly use traditional tools of political communication. In addition, the focus of communication is clearly based on party organizations, while candidate campaigns present a relatively low level of professionalization, as shown by the use of external consultants, campaign budgets and planning (Lisi and Santana-Pereira 2014). Asking candidates to what extent they attract attention for their party or for themselves during the campaign, most respondents reject the notion of individualized campaign and express support for their party⁴. Finally, candidates play a marginal role in the mobilization of citizens at the local level and make limited use of new information technologies, two features conventionally associated with post-modern campaigns (Seiceira 2011).

Several factors may account for this high level of centralization. First, candidate recruitment largely depends on national party bodies, while the party leadership controls

⁴ In 2012, the average placement of candidates was 2.3 in a scale between zero (attention for the party) and 10 (attention for the candidate).

the careers of candidates and deputies (Teixeira, 2009; Freire and Teixeira, 2011)⁵. Second, the mass media tend to focus on the main party leaders, especially those who compete for government. Third, Portuguese parties are heavily dependent on state funding, and corporate donations to parties or candidates are prohibited. This regulation strengthens the power of parties compared with candidates. Finally, it is also important to consider that the proportional representation system favors party-centred campaigns, thus enhancing the role of party leaders over candidates.

Taking into account the effect of the crisis, the findings suggest that austerity policies implemented since 2008 did not have a significant impact on campaign strategies of candidates and the way they establish linkages to voters. With regard to communicative focus and campaign means, the degree of individualization has remained unchanged during the post-crisis period. The only important effect deals with the emphasis candidates give to local issues (Lisi and Santana Pereira 2014).

We now move to the analysis of MPs' views on their representative role. In general, the relationship between deputies and voters in Portugal has been interpreted as a prototype of the 'responsible party government' model, which underlines the capacity of parties to present distinct programmatic proposals, while MPs are elected with the aim to apply and respect parties' orientations, thus preserving party discipline and the cohesion of parliamentary groups (Schattschneider, 1942; Converse and Pierce, 1986). Despite the theoretical and methodological limitations of the model (Brack et al. 2012), it is clear that the interpretation of the mandate by Portuguese MPs seems to privilege nation's interests and, in a second place, party's orientations. The prohibition of imperative mandate established by the Constitution (art. 155), the closed-list PR system, as well as the monopoly - *de jure* and *de facto* – of parties with regard to candidate selection (for national elections) and the centralization of political recruitment are all elements that foster a 'collective' representation, where population and parties' interests prevail over constituents' preferences.

The analysis of representatives' opinions is crucial in order to understand political representation, particularly with regard to the role of parties in constraining deputies' action and the criteria that guide their behaviour. To examine MPs' attitudes, we consider two old concepts that are at the core of political representation studies. The first is the

⁵ Despite some variations between parties. Several studies points out the higher level of decentralization for PSD, as well as the BE (Teixeira, 2009; Freire and Teixeira, 2011).

'focus' of representation, which is related to who should be represented, while the second is the 'style' of representation, i.e. how representation should be enacted, specifically the degree of independence that the representative should have in his/her decisions (principally vis-à-vis the party or the voters) (Eulau et al., 1959; Thomassen, 1991). Although this distinction may be not always clear in practice, a number of works assume that these are two distinct dimensions (Judge, 1999; Teixeira, 2009; Brack et al., 2012; Teixeira et al., 2012). Following Burke's seminal contribution, conventional studies distinguish between party delegate and trustees (Pitkin, 1967; Andeweg and Thomassen, 2005; Mansbridge, 2003; 2011; Rehfeld, 2009; 2011). However, empirical studies on European countries have challenged this typology due to the constraints of party discipline (Thomassen, 1994: 251-252; Andeweg, 2003; Andeweg and Thomassen, 2005).

As far as the focus of representation is concerned, empirical studies in Portugal indicate that most deputies support the idea that MPs should represent the population as a whole more than party or constituents' interests (Teixeira, 2009: 93; Teixeira et al., 2012: 103)⁶. The MPs' surveys conducted between 2008 and 2013 suggest that the overwhelmingly majority of Portuguese deputies represent the population in general (88%) rather than parties, the district or their voters (Espírito Santo and Lisi 2015: 436). These findings are not only related to the norms established by the Portuguese constitution, which reject explicitly the possibility of imperative mandate, but also to the high level of centralization of candidate recruitment. Empirical research also found some variation among MPs, in particular those deputies elected in smaller districts give more emphasis on territorial interests, while in districts with higher magnitude the preferences of the electorate at large prevails (Brack et al. 2012; Pilet et al. 2012; Espírito Santo and Lisi 2015: 437).

Moving to the style of representation, Teixeira (2009) distinguishes between trustee, voter delegate, party delegate and the 'political style'. Voter delegate interprets his/her mandate as a contract with the 'principal', in this case the voter. By contrast, party mandate is based on party discipline and the respect of party orientations. Trustee implies an autonomous action of representatives, whose actions are guided by their values and convictions. Finally, the political style is based on the ambivalence in the interpretation of the role of MPs. In this case representatives tend to act in different

⁶ The question included in the surveys was the following. 'There are different opinions regarding who MPs should represent. What is your opinion? 1) the voters of his/her party constituency; 2) All citizens of your constituency; 3) Portuguese citizens'.

ways according to the context and the specific issues that may arise during the mandate, thus oscillating between a complete independence and the subordination to their main principals (voters or parties). This dimension is examined through a battery of questions addressed to MPs⁷.

Drawing on MPs' surveys, the empirical findings indicate that the majority of deputies act according to the 'trustee' model, thus giving more relevance to their own opinion. Following the party lines is the second most important criterion that seems to drive MPs' mandate, confirming the importance of party discipline (Teixeira et al. 2012; Brack et al. 2012). Voters' preferences are the least important element that guide representatives' behavior. It is also worth noting that this hierarchy (and the relative importance attributed to the different criteria) has remained stable over time (2008-2013), with only very slight differences. District magnitude is again an important determinant of MPs' attitudes, but its impact depends on the alternatives presented to the deputy. In larger districts, the style of party delegate is stronger vis-à-vis constituents' preferences, but it declines when the alternative option is the trustee model. Finally, as it happened for the focus of representation, communist deputies present distinct perceptions compared with other MPs, giving more emphasis to party discipline.

These results confirm the crucial importance of parties in the functioning of political representation (Teixeira 2009; Brack et al., 2012: 395-396). Yet, the criteria that drive representatives' behavior are not very clear. For example, drawing on a candidate survey for the 2002 elections Teixeira (2009: 95) found that most of MPs support a political style, whereas a minority interprets its role as a party delegate (8.6%). However, deputies attribute a great importance to party discipline (Teixeira et al., 2012; Brack et al., 2012). This contradiction might be explained not only through the conflict between the norms and the practice followed by deputies, but also because of the difficulties to find empirical indicators that may capture the tensions and dilemmas of the representative function.

There is some change with regard to deputies' attitudes towards the focus of representation. In 2012-13, there is a lower proportion of voters that act on the basis of

⁷ These are: 1) In your opinion, how should a member of parliament vote if their own opinion on an issue does not correspond with those of the voters in the constituency?; 2) In your opinion, how should a member of parliament vote if their own opinion on an issue does not correspond with that of their party?; 3) In your opinion, how should a member of parliament vote if the voters in the constituency have a view on an issue that does not correspond with the opinion of their party?

their constituencies, of the voters or the party. In other words, there is a lower consensus on a more restricted vision of representation, whereas those who defend the representation of the population present a similar percentage registered in 2008. Although it is difficult to understand the mechanisms that are behind this phenomenon, the result might be due to the feeling of solidarity felt after the crisis, which may pressure MPs to privilege national interests. In a hostile context, it is plausible that the emphasis on interests that are politically closer is not socially acceptable, especially when we consider that austerity measures have effects on the population in general.

Overall, the findings show that the national dimension prevails on local or political links. In the Portuguese case it is clear the hierarchy between structural incentives and lower factors, such as the territorial rootedness of deputies or the exercise of local mandates. Nonetheless, the extant research also emphasizes the differences between parties, especially between the CDU and the remaining parties, thus stressing a prevalence of ‘party delegate’ from the point of view of communists or ecologist MPs. Yet this difference is a structural one and it is not related with the changes introduced after the bailout. From this point of view, the results do not confirm a strengthening of the linkage between parties and voters.

V - The voters-MPs' congruence in ideological (left-right) and issue dimensions, before and after the Great Recession

Our third objective aims to examine the congruence between the political preferences of the elected representatives and citizens. Following the path laid out by Miller and Stokes' (1963) seminal article, the underlying assumption is that the higher the degree of congruence between the preferences of the electorate and the deputies, the higher the probability the electorate will feel themselves to be well represented and the higher the probability the legislators (and the government) will act in accordance with the people's preferences, which is a basic axiom of any representative democracy (Manin, Stokes & Przeworski 1999).

Voters' and MPs' Positions on the Economic Left-Right Index

There has been a long debate in political science concerning the content of the left-right divide, however there has always been a correlation, at least at the level of

voters, between the left-right dimension and classical economic issues related to the class cleavage (e.g. Knutsen 1997; Freire 2008). Yet, this correlation has been traditionally weaker in Portugal due to a number of factors, such as comparatively low levels of education, political interest, political sophistication and, above all, low polarization at the party level (Freire & Belchior 2013, p. 7). Nevertheless when comparing the positions of MPs and voters on the economic left-right index for the 2008 dataset, it was interesting to observe a high degree of congruence between representatives and the electorate (data not shown due to spatial limitations), especially on the left (Figure 1) (see also Freire & Belchior 2013, p.9).

[Figure 1: about here]

This image is not reproduced in the case of the 2012 for the overall sample (data not shown due to space limitations): the masses remained pretty much leftist (mode of around 1,9 in a 1-5 scale); the MPs became more polarized (moved from a single mode, around 1,9, to bimodal distribution, with one mode around 1,5 and another mode around 3,2).⁸ Even though the positions of voters remain virtually unchanged, there is a marked move of MPs to more economically rightist positions. This seems to confirm an increasing polarization at the elite level, but not at the mass level, in this first dimension. Examining Figure 1 and the movements by party across this ‘economic left-right value dimension’, it becomes clear that the rightward move among MPs can be attributed mostly to the MPs of PSD, which was the only parliamentary party group that exhibited a move to the right, and this was a statistically significant move (the only one relevant on the right). However, due to its size the entire MP sample appears to have moved rightwards in economic terms, confirming the perceptions of voters that have identified a move of PSD to the right. In other words, PSD appears responsible for a situation approximating a case of ‘disconnecting representation’. A stark move to the right on economic issues by the major governing party that is not followed neither by the electorate at large nor by the parties’ own voters.

⁸ We believe that an overall F-test would tell us whether the differences between if the different groups of party voters (or of party MPs) are significant as a whole but they would not provide to have a picture of differences within each party (for example, when compare BE Sympathizers in 2008 versus BE Sympathizers in 2012, or BE Sympathizers in 2012 versus BE MPs in 2012). This is why we choose independent samples t-tests instead of an overall F-test.

There is a similar situation reproduced by the other parties but in a different direction. Whereas the positions of voters for every single party remains stable from 2008 to 2012, MPs of PS, BE and CDU make significant movements to the left. In other words, the image of more polarization in 2012/13 vis-à-vis 2008 among MPs is confirmed in terms of the economic left-right value divide, even though no such dynamic appears to exist at the level of public opinion.

Voters' and MPs' Positions on Cultural issues

In terms of the items associated with positions on cultural issues, the first observation that we can make is that there is not much change in the several items, both at the voters and the MPs levels, between 2008 and 2012, but especially for the case of voters. This is especially the case for the items related with ‘the protection of the environment’, ‘stiffer sentences for those who break the law’ and ‘immigrants are good for Portuguese economy’ - see Figures A2.2, A3.2 and A4.2 in the Appendix of the Chapter by Freire, Tsatsanis, and Lima, 2016.

Value orientations appear to be much more uniform across the electorate in relation to economic issue preferences (recall Figure 1 above). Moreover, in 2008 MPs from left parties were more congruent vis-à-vis their voters in the economic left-right divide than right-wing MPs (Freire & Belchior 2013; Belchior & Freire 2013; see also Figure 2). In 2012/13, right-wing incongruence is reinforced for the economic left-right divide, especially in the case of PSD. However, in terms of the issues authoritarian-libertarian divide, the situation is more mixed since we also analyzed levels of congruence item by item. For the same-sex marriage, the right is clearly more congruent than the left. But in the case of the abortion issue, with the partial exception of PCP (MPs more libertarian than their voters; but small distance MPs-voters than on the right), the left (BE and PS) is more congruent than the right (MPs more authoritarian than their voters). As for the ‘environmental protection’, there are not much differences between voters and MPs (except BE: MPs defending more protection than their voters; and PSD: MPs defending less protection than their voters). Concerning ‘the immigration issue’, all MPs are more libertarian than their voters, but this even more pronounced on the left. About ‘the authority issue’, contrary to 2008, in 2012 all MPs are rather congruent (in general

authoritarian mood) vis-à-vis their voters (except for the PS: more libertarian than its voters).

The impact of the crisis in EU support

Concerning the impact of the crisis in EU support, we rely on the study by Freire, Teperoglou, and Moury (2014). The decline in EU financial support and the financial and economic crises, in conjunction with the EU possibly being to blame for them, has created a new balance/equivalence concerning what is of benefit to the country. From the golden era of the 1990s, when Greek and Portuguese voters experienced economic growth and rising incomes, the current crisis creates a different situation. In 2013, for the first time since Portugal's accession, the percentages for both variables fell below the European average. On one hand, this criticism of the EU confirms our first hypothesis for Portugal; on the other, it should be noted that the declining trend in support for Europe predates the crises, having been first noted in 2005. Nevertheless, in the case of Greece it is clear that anti-European attitudes are related closely to the crisis. However, in 2013 identical results were recorded in both countries: the positive evaluations dropped dramatically, with only 34 per cent of respondents in either country willing to say membership of the EU is a good thing.

There are three very powerful additional pieces of evidence to strengthen our view. First, there are similar trends across time in other crisis countries (Cyprus, Italy and Spain) that are not mirrored by similar trends across the EU as a whole (EU average). Second, similar trends are found for Greece, Portugal and the other crisis countries, which contrasts with the EU average, and are also found when we use indicators of 'support for EU political institutions' (trust in the European Parliament and in the European Commission) (see Figures A1.5 and A1.6; online Appendix 1, in the article by Freire, Teperoglou and Moury, 2014). Third, the individual-level data presented above proves there is an important link between voter and elite evaluations of austerity policies and the level of support for the EU, and even after controlling for all other major explanatory factors for Euroscepticism (Freire, Teperoglou and Moury, 2014).

About whether this increase in Euroscepticism at the voter level is matched at the elite level, the study by Freire, Teperoglou and Moury (2014) concluded the following. In the case of Portugal radical left voters always show greater support for the EU than deputies in this ideological camp. Both in Greece and Portugal the central (left and right) political elite is always much more supportive of the EU than its constituents. In terms

of trends, we can say that in the Portuguese case there has been a decline in support for the EU among all voters and the political elite, although in general the decline is much more pronounced at the voter level, so incongruence on EU issues has been augmented and the ‘giant’ is now bigger. Yet it cannot be awakened because the very high level of Euroscepticism at the voter level has no match at the elite level, especially among the centrist parties.

Finally, at the micro-level, they also confirmed our hypotheses for Portugal, showing the potential for political contestation of the issues concerning the Troika agreement, debt renegotiation and austerity policies (Freire, Teperoglou and Moury, 2014). The bailout has had a significant impact on evaluations of support for the EU at both the voter and the elite level, even after controlling for the other major explanatory factors of Euroscepticism. However, in the case of Portugal we always found consistent and unidirectional results—negative evaluations of the Memorandum of Understanding and positive evaluations of debt renegotiation always boost Euroscepticism, at both elite and voter level.

VI – Conclusions

Political representation is a growing field of research in Portugal, especially since the onset of the economic crisis. The increasing availability of data provided the opportunity to fill some important gaps compared with the international literature, improving our understanding of the specificities of the Portuguese case, as well as our knowledge about some of the main challenges that affect the quality of democratic regime in Portugal from a comparative perspective.

In terms of the relationship between the Portuguese electorate and their political system, studies conducted after the onset of the economic crisis show that even though certain indicators of trust towards political institutions and satisfaction with democracy demonstrated steep downward movements in the aftermath of the crisis, this movement has been mostly isolated to indicators of (already relatively low) specific support, but has not produced any dramatic effects on the legitimization of the Portuguese political system as a whole. The growing discontent, towards both the executive and the legislative branch, as well as lower levels of satisfaction with democracy, do not appear to impact a general preference towards the democratic regime at large and, following conventional wisdom in the relevant literature, could very likely end up following a similarly steep

upward trajectory if economic conditions improve and the economic crisis is put in the rearview mirror. As stated before, a greater question mark and possibly danger to the Portuguese democracy concerns longer-term, sustained cross-national trends of discontent and dissatisfaction with the performance of democratic institutions which, in a society which is also characterized by comparatively high levels of political disaffection, is less likely to produce an electorate of critical democrats, people dissatisfied with democracy due to growing expectations, and more likely to produce a populace that to a large extent turns its back to politics and loses its faith in representative institutions completely.

Concerning the modes of representation of Portuguese MPs, empirical findings suggest several interesting points. First, deputies' action in Portugal has generally displayed a very low degree of individualization. This situation emerges not only with regard to the activities and attitudes of prospective candidates (Lisi and Santana-Pereira 2014), but also when we look at constituency service and dissent from the party line, two crucial indicators of the degree of autonomy of legislators. On the one hand, it has been noted that MPs' constituency orientation centers mainly at the national level rather than on the territorial criteria (Teixeira 2009). In addition, candidate and MPs' survey indicate that representatives do not spend much time on constituency activities, while general elections are, by and large, referenda on government performance. In general, the focus at election time is typically and overwhelmingly on national party competition. On the other, the party cohesion in the Parliament is very strong, while party dissent is related more to local issues than on national matters (Leston-Bandeira 2009).

In general, the economic crisis appears to have a greater impact on MPs rather than the electorate, which appears to be demonstrating mass stability during exceptional times both in terms of ideological preferences as well as underlying value orientations. However, the movement towards the right by the MPs of the major right-wing governing party on economic policy (already clearly perceived by voters as shown in Figure 1) threatens a significant representation crisis due to increasing levels of incongruence in policy preferences between MPs and their constituents. This trend is exacerbated by a countermovement of the opposition parties, contributing to a growing polarization inside the political elite in Portugal, which negates a projected image during the early stages of the crisis of a political culture among elites based on consensus and mutual accommodation.

On the European issues, the research by Freire, Teperoglou, and Moury (2014), confirmed that both the aggregate decline of support for EU, at the macro level, and the individual level of support for the EU in 2012-2013 are significantly related to the crisis, especially at the voters level but also at the elite level, even when control an extended set of other relevant explanatory factors. Moreover, using both mass and elite surveys (2008 and 2012-2013), we conclude that in Portugal, there has been a strong rise in Euroscepticism at both the elite and the voter level; however, for the centrist parties (both left and right) this growth was stronger at the voter level than at elite level; and for the radical left parties the growth in Euroscepticism was greater for deputies than for voters. Overall, and especially for centrist parties, the incongruence between elites and voters (with the latter much more Eurosceptic than the former) is now greater than before the bailout. Therefore, we can conclude that while the giant is now larger, the voters cannot fully translate their Euroscepticism at the political system level, so it is not yet being allowed to awaken.

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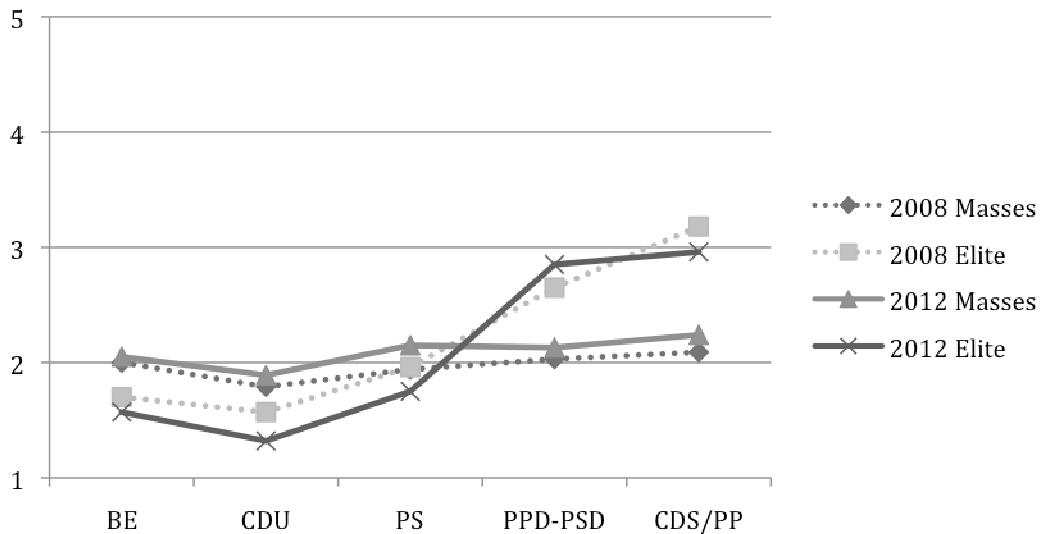
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Figure 1: Voters' and MPs' Positions on the Economic Left-Right Index of Value Orientations by Party (5 – Economic Right; 1 Economic Left)



Sources: data elaborated by the authors using the voters and MPs surveys included in Freire & Viegas 2008a and 2008b; Freire, Viegas & Lisi 2012 and 2013.

Notes:

T-tests for population means (variances unknown and unequal):

a) *Voters 2008-Voters 2012:*

BE: $t(76)=1.77$, $p=0.081$
 CDS: $t(30)=0.95$, $p=0.351$
 CDU: $t(142)=1.32$, $p=0.189$
 PSD: $t(228)=0.30$, $p=0.764$
 PS: $t(467)=1.66$, $p=0.099$

b) *MPs 2008-MPs 2012:*

BE: $t(12)=2.88$, $p=0.014^{**}$
 CDS: $t(19)=-0.01$, $p=0.99$
 CDU: $t(15)=2.51$, $p=0.024^{**}$
 PSD: $t(39)=-3.56$, $p=0.001^{**}$
 PS: $t(44)=3.42$, $p=0.001^{**}$

c) *Voters 2012-MPs 2012:*

BE: $t(12)=-4.19$, $p=0.001^{**}$
 CDS: $t(28)=2.92$, $p=0.007^{**}$
 CDU: $t(9)=-4.72$, $p=0.001^{**}$
 PSD: $t(112)=8.49$, $p=0.000^{**}$
 PS: $t(45)=-3.38$, $p=0.002^{**}$

** Reject the null hypothesis ($H_0: \mu_1 = \mu_2$)

Table 1: Portuguese Studies on prospective MPs (candidates) based on Candidate Surveys

Type of survey	Study	Time span	Survey Mode	Response rate	Overall evaluation of data quality
Candidate Survey (not in the CCS network)	Teixeira, 2009b, and 2009c	2002 elections	Mail survey	N = 300 out of 1150 (26%).	Good (although low response rate)
Candidate Survey 2009 – CCS PT	Freire & Viegas, 2009 and 2010a; Freire & Pequito, 2011	2009 elections (fieldwork 2009-2010)	Mail survey (some elected candidates, MPs: face-to-face)	N = 300 out of 1150 (17,7% of the universe, 28,4% of the questionnaires sent)	Good (although low response rate)
Candidate Survey 2011 – CCS PT	Freire, Viegas & Lisi, 2013b; Freire, Lisi and Viegas, 2015 and 2016	2011 elections (fieldwork 2012-13)	Mail survey (some elected candidates, MPs: face-to-face)	N = 257 out of 1150 (22,3% of the universe and 29,3% of the questionnaires sent) (for some variables only 190 respondents)	Good (although low response rate)
Candidate Survey 2015 – CCS PT	Freire, Lisi & Tsatanis, 2015	2015 elections (fieldwork 2016-17)	Mail survey (all elected candidates, MPs: face-to-face)	To be done	To be done

Table 2: Portuguese Studies on MPs based on MP surveys

Type of survey	Study	Time span	Survey Mode	Response rate	Overall evaluation of data quality
MPs survey, 2007 (PhD research)	Belchior, 2012	Survey in 2007 (elections 2005) (fieldwork 2007)	Face-to-face	79 respondents / 230 MPs: 34,3%	Reasonable: low response rate and small n° of questions
MPs survey, 2008 (PARENEL Network)	Freire & Viegas, 2009 and 2008	Survey in 2008 (elections 2005)	Face-to-face	142 respondents / 230 MPs: 61,7%	Good
MPs survey, 2009 (PARTIREP Network)	Freire & Viegas, 2009 and 2010b	Survey in 2008 (elections 2009) (fieldwork 2009-2010)	Web-survey (email) (some face-to-face or email)	130 respondents / 331 MPs (islands included): 39,3%	Good low response rate
MPs survey, 2013 (PARENEL)	Freire, Viegas & Lisi, 2013a; Freire, Lisi and Viegas, 2015 and 2016	Survey in 2012-2013 (elections 2011; filedwork 2012-2013)	Face-to-face	123 respondents / 230 MPs: 53,5%	Good
MPs survey, 2016 or 2017 (CCS)	Freire, Lisi & Tsatsanis, 2016-2017	Survey in 2016-2017 (elections 2015; fieldwork 2016-2017)	Face-to-face	TBD	TBD