

Second-order Economic Voting in Elections to the European Parliament

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Abstract

When examining citizens' behaviour in elections to the European Parliament (EP), second-order elections (SOE) and economic voting (EV) have overlooked each other as alien traditions. However, they should not be seen as incompatible: voters may use EP elections to support national incumbents but, at the same time, this support may be the result of an economic assessment. This paper blends both frameworks and finds that, even though EP elections are not intended to evaluate domestic politics, voters use them to reward or punish national incumbents (i.e. SOE) for the state of the economy (i.e. EV); a behaviour referred to here as 'second-order economic voting'. The predominance of second-order EV is relevant for EU politics. If EP elections enhance national incumbents' accountability while the European executive remains unacknowledged, this could be disturbing for European economic institutions.

Keywords: European elections; second-order elections; economic voting; accountability

Resumen. *Voto económico de segundo orden en las elecciones al Parlamento Europeo*

Al estudiar el comportamiento de los ciudadanos en las elecciones al Parlamento Europeo (PE), las elecciones de segundo orden (ESO) y el voto económico (VE) se han ignorado como tradiciones ajenas. Sin embargo, no deberían considerarse incompatibles: los votantes pueden utilizar las elecciones al PE para apoyar a los titulares nacionales, pero, al mismo tiempo, este apoyo puede ser el resultado de una evaluación económica. En este trabajo se combinan las dos tradiciones y se constata que, aunque las elecciones al PE no tengan por objeto evaluar la política nacional, los votantes las utilizan para recompensar o castigar a los titulares nacionales (es decir, ESO) por el estado de la economía (es decir, VE), un comportamiento que aquí se denomina «voto económico de segundo orden». El predominio del VE de segundo orden es relevante para la política de la UE. Si las elecciones al PE aumentan la responsabilidad de los titulares nacionales mientras el ejecutivo europeo sigue sin ser reconocido, esto podría ser perturbador para las instituciones económicas europeas.

Palabras clave: elecciones europeas; elecciones de segundo orden; voto económico; rendición de cuentas

Summary

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1. Introduction

This article addresses a puzzle that persists in the analysis of the successive European Parliament (EP) elections. On the one hand, EP elections have traditionally been explained using the second-order elections (SOE) framework. This implies that the voting choice in these elections merely reflects citizens' support for (or opposition to) the national incumbents (Schmitt & Teperoglou, 2017). The key variables are the timing of the elections, the parties' size, and some others; all of which have a clearly political nature and very limited economic content. On the other hand, most national elections held over the last few decades have been analysed, at least in part, within the economic voting (EV) framework. Looked at this way, incumbents tend to win elections in prosperous times and lose them during economic crises (Lewis-Beck & Lobo, 2017). The literature in this field usually considers that this attribution of economic responsibility occurs mainly in national elections and, thus, historically, it has tended to somewhat overlook EP elections. To put it extremely simply, we have a dominant framework for analysing EP elections that often ignores the economy, and an economics-centred framework dominating electoral analysis that – until the European debt crisis – paid scant attention to EP

elections.¹ It is true that in the aftermath of the European debt crisis, many EV experts hurried to analyse the EP elections from an economic point of view. But this has not helped the two traditions to come together: the theoretical section of this article will show that they often overlook each other, infrequently converge, and seldom mix their models. Two excellent special issues published about the 2019 EP elections provide some symptomatic evidence. The one published in *Electoral Studies* is clearly committed to an EV framework: none of its six articles uses SOE in their analyses. On the other hand, the special issue published in the journal *Politics* explicitly chooses SOE as a framework of analysis, while EV is noticeably missing.

Curiously, the two traditions are not actually contradictory in nature, they simply focus on different matters: EV focuses on searching a cause for people's vote choice, whereas SOE focuses on the electoral context and thus theorises under what conditions we should expect stronger effects. The article aims to overcome this dissociation using a blended model that brings together the two lines of research. It shows that combining SOE with EV gives rise to a concept (second-order economic voting or second-order EV) that greatly clarifies the role of economic conditions in EP elections as a classic example of second-order elections. Although the concept has not been extensively used previously, it is not completely novel. It is rather an addition to a line of work already developed by previous authors alluded to in Section 2.3. The article shows how voters apply the logic of the SOE framework, using EP elections to support national incumbents but, at the same time, how these voters also apply the logic of the EV framework and make this support the result of an economic assessment. To this end, the article uses the European Election Studies from 2004 to 2019 (a merged data file with $n > 100,000$) to estimate several regression models. Most of these models have a dependent variable that captures whether the respondents voted – in the EP elections – for the candidacies put forward by their national government's main incumbent party. Among the independent variables, particular emphasis is placed on people's economic assessments, as is usual in EV studies. The results will show that, although EP elections are not meant to appraise national incumbents, voters do indeed use EP elections to reward and punish the national incumbents for the state of the economy. The results will also shed light on the role played by the context: this pattern of reward/punishment is boosted when the share of the cabinet occupied by the main national incumbent party increases, but the results do not confirm that this reward/punishment pattern weakens when the transfer of economic responsibility to the EU grows.

The predominance of second-order EV in EP elections is particularly relevant for EU politics. The findings show that the institutions that voters hold accountable for the economic situation during EP elections are their national

1. Like any simplification, this one might be an oversimplification. As I will show in Section 2.3, the uncommunication between the two frameworks is not as radical as it may sound here.

governments and not the European executive. Moreover, the European debt crisis has revealed how EU economic policy makers have expanded their authority over national economic authorities. If the findings insinuate that the latter are economically accountable, while the former show no signs of being so, this may constitute a disturbing sign of the European economic institutions' lack of accountability. Looking at it another way, this may be a sign that they are healthily independent.

The structure of the article follows a sequence of sections that is usual in political science. Section 2 reviews the literature of the two traditions in question and their somewhat limited common ground. The section ends with four hypotheses derived from the literature review. Section 3 is a conventional data and methods section. Section 4 contains the findings: even if European voters do not attribute economic responsibility to European incumbents, they certainly use economic performance to decide who they will vote for in EP elections – the only peculiarity being that they seem to have national incumbents in mind, and not European officeholders. Section 5 concludes.

2. EV and SOE: separate tables with a little common ground

2.1. *The SOE literature*

The point of departure for the literature on SOE is that political institutions are arranged in successive hierarchical levels, with each holding its own elections. At the top level, there are political institutions that hold most of the political power, such as the national presidency or the national government. First-order elections (FOE) ultimately determine the composition of these powerful political institutions. Some presidential elections and some national parliamentary elections are clear examples of FOE. At the bottom level, there are political institutions with little political power, such as regional assemblies or the EP. SOE are elections that determine who controls these less powerful political institutions. Regional or EP elections are clear examples of SOE (Reif & Schmitt, 1980).

During most FOE campaigns, the issues subject to discussion (if any) tend to be precisely those that will be managed by the political institutions to be elected. Conversely, SOE are peculiar because they do not tend to be fought on the issues that the elected institutions will manage. This happens because SOE campaigns suffer what is known as the 'contamination effect'. FOE issues are seen as more relevant than those managed by the institutions to be elected in a SOE. Thus, the former tends to eclipse the latter even if the campaign is solely for a SOE, and even if no FOE is looming on the horizon. As an example of this, European Parliament elections were traditionally dominated by national issues instead of touching on matters subject to EP competence (the past tense suggests that EP elections may be currently reducing 'the second-order character of the contest' (Schmitt & Teperoglou, 2017: 71-72).

All this has important consequences for the goals of this paper. In a nutshell, voting choice in SOE tends to be related to issues regarding FOE. The literature has emphasised two of these issues: the timing of the SOE within the FOE cycle and the size of the parties in the FOE (Schmitt & Teperoglou, 2017). Regarding the FOE cycle, the literature concludes that the popularity of the FOE incumbents tends to follow a U-shaped pattern: incumbents are popular during the honeymoon period, lose popularity during the mid-term, and gain it back in the run-up to the next election. Thus, FOE incumbents tend to lose votes in SOE following their U-shaped popularity pattern: the loss is greatest if the SOE is called in the middle of a FOE's term, whereas it is mitigated if the SOE is held during the FOE's honeymoon period or held in the run-up to the next FOE. As for party size, the literature concludes that large parties (i.e. those that perform best in FOE, both incumbents and large opposition parties) tend to lose votes in SOE. This happens because strategic voting is unusual in SOE due to their lesser importance. Thus, many of those who coordinated their vote around large parties in FOE tend to vote sincerely in SOE and end up voting for smaller parties (or abstaining). Alternatively, this may also happen because large parties always trigger some form of protest vote that is more easily expressed in SOE. The other side of the coin is that small parties tend to gain vote share in SOE, precisely for the same reasons.

To conclude, the SOE model focuses on election cycle and party size as the main causes of vote choice. But for the aim of this paper, just as relevant as the fact that these two variables are so explicit in the model is the fact that some variables are often absent from it: 'The SOE model does not focus on economic performance variables' (Schmitt & Teperoglou, 2017: 65). That is, apart from some exceptions mentioned in Section 2.3, the SOE model often pays little attention to EV.² A recent special issue on the 2019 EP elections published in the journal *Politics* happens to provide an opportune confirmation for this. The issue explicitly chooses SOE as a framework for the analysis, and EV is noticeably absent. Four of the eight articles make no reference to the economy whatsoever (Gattermann et al., 2021; Maier et al., 2021; Ehin & Talving, 2021; Palacios & Arnold, 2021); three of them introduce economic evaluation as a control variable in their models but do not comment on the relevance of that inclusion and the results (Braun, 2021; Schäfer, 2021; van der Brug et al., 2021); and only Sorace (2021: 506) explores the EV framework at all, only to reject it by arguing that legislative productivity is a much better alternative. Clearly, the problem is neither the quality of the articles nor the authors' expertise. The real problem is one of compartmentalising knowledge.

2. It may certainly be argued that a) the national incumbent's popularity has an economic basis and b) the SOE model tends to emphasise the role of the national incumbent's popularity. Therefore, the SOE model would have an indirect or implicit economic basis. However, we should evaluate the models by their explicit foundations, not by implicit speculations.

2.2. *The EV literature*

The main thesis upheld by EV is straightforward: when the economy performs well, voters reward the incumbents with their votes; when there is an economic downturn, voters punish the incumbents by voting for the opposition (Stegmaier et al., 2017). An initial methodological approach in EV linked national macroeconomic conditions to voting results (Kramer, 1971), giving rise to what has been called a ‘vote function’. Voting results could be replaced by incumbent popularity data, providing many more time points. This gave rise to what is known as the ‘popularity function’ (Goodhart & Bhansali, 1970). However, this initial aggregate-level methodology was soon overshadowed by an individual-level approach. This last approach substituted the objective national macroeconomic conditions with survey data on the subjective assessment of economic conditions. Although many censured the potential endogeneity of the relationship, this individual-level approach has become very popular. Debate has proliferated on the nature of EV: whether it is retrospective or prospective, sociotropic or egotropic, asymmetric or symmetric, relative or absolute, valence or positional, how it is shaped by events, or whether the model is useful for forecasting (Stegmaier et al., 2017: 587).

A key development in the EV literature (and one that is particularly relevant for this article) was the introduction of the institutional context (Duch & Stevenson, 2008) as a key interaction to explain why EV succeeds in some contexts, but not so much in others. For instance, a presidential system adjusts better to an EV pattern than a coalition government. A closely related improvement in the EV literature was the development of the clarity of responsibility concept (Powell & Whitten, 1993). The concept alludes to a regularity: the EV relationship holds strong when the voter very clearly identifies the incumbent’s responsibility for economic policy. Conversely, when the responsibility is so blurred that the voter can barely attribute who does what in economic policy, the EV relationship weakens (van der Brug et al., 2007: 173). Following the development of this concept, a great number of factors have been found to increase clarity of responsibility. For instance, the stability of the party system increases clarity of responsibility and thus EV intensifies; conversely, trade openness blurs clarity of responsibility, causing EV to weaken; the same lack of clarity happens when there are coalitions, cohabitation, technocratic caretaker cabinets, etc. And crucially for this article’s purpose, two key regularities have emerged: clarity of responsibility is higher in unitary nation-states rather than in federal ones; and even in federal settings, clarity of responsibility is higher for the federal nation-state rather than for other levels of government. These two findings are crucial for understanding why EV scholars used to focus their research on national elections (or FOE). Since they knew that the likelihood of encountering positive findings was higher there, they examined FOEs extensively whereas SOE became less promi-

ment in their work.³ In fact, a major review of EV concludes that ‘economic voting occurring in a fully sovereign state (...) is what most articles measuring economic voting have been dealing with in the past’ (Lewis-Beck & Lobo, 2017: 610).

This was the situation until the European debt crisis, which boosted EV analyses of EP elections. Accordingly, *Electoral Studies* published a special issue on the 2019 EP elections that had a clear EV approach. Even if applying the EV framework to EP elections marked an unquestionable advancement, it did not lead to any melding of EV with the SOE framework. Only one of the papers in this special issue (Ruiz-Rufino, 2021) makes a single reference to SOE, while all the others (Lobo & Lewis-Beck, 2021; Lobo & Pannico, 2021; Heyne & Lobo, 2021; Talving & Vasilopoulou, 2021; Dassonneville et al., 2021) continue to be impermeable to the SOE framework that is traditionally dominant in the analysis of EP elections.⁴ Again, the blame cannot be laid on the quality of the articles, nor on the excellence of the authors, because they are all outstanding. It merely reveals the compartmentalisation of knowledge alluded to above.

2.3. The common ground

Even if the SOE model largely ignores EV, and EV sometimes disregards SOE, some exceptions do exist, and the two traditions occasionally concur. In other words, the present article is obviously not the first paper to combine both theories. Curiously, the first exception is not a marginal article, but two of a pioneer’s key works. Tufte (1975 and 1978) shows how midterm elections (the closest to SOE at the time) are referendums on the national incumbent’s economic performance. Although initially popular, this so-called ‘referendum theory’ has not enjoyed the later attention that its perspicacity deserves. In another exception, Anderson and Ward (1996) show how the results in certain SOE (British by-elections and German Land elections) are modified by changing economic conditions, what they refer to as ‘barometer elections’.

3. Note this does not mean that federal settings are under-investigated in EV. It rather means that – aside from the exceptions mentioned in Section 2.3 – the focus of the research on EV in federal settings was traditionally placed on the level of the federal nation-state and not on other levels of government (Anderson, 2006). It is also true that the EU was sometimes an issue in the EV literature, but more as an independent variable rather than as a dependent one, that is, how the EU influences EV in member-state national elections rather than how EV happens in European elections. Regarding the former, there is abundant literature showing that holding the EU responsible for economic policies blurs EV in member-state national elections (Lobo & Lewis-Beck, 2012; Magalhaes, 2014). The same happens when perception of EU responsibility is replaced with simpler variables such as being pro-EU or being in the Eurozone (Hobolt et al., 2013; Hobolt & Tilley, 2014).
4. Curiously, *Electoral Studies* had also published a special issue on the previous 2014 EP elections with a slightly more blended approach. Some of these articles will be mentioned below.

Thus, the common ground between EV and SOE was very limited until interest in this meeting point deepened. Given the vast amount of work on voter's behaviour in regional elections, it was only a matter of time before a scholar suggested an economic interpretation of them. In this way, over the last two decades, several authors have analysed EV in regional elections (e.g. Gélineau & Bélanger, 2005; Queralt, 2012; Schakel, 2015) and have popularised the concept of regional economic voting, which has become an active field in the discipline.⁵ For the purposes of this paper, the interest of the literature revised here lies not only in the fact that it covers both fields (EV in SOE), but especially in the way that it analyses EV from the viewpoint of contamination between electoral arenas characteristic of the SOE model. For instance, Gélineau and Bélanger (2005) show that certain provincial incumbents are punished for national (and not provincial) economic deterioration. The idea that SOE results are primarily shaped by certain events that occur in the FOE arena is a truly SOE conception of the world. And if these events are economic in nature, if voters attribute the responsibility over these events to certain incumbents, and if these voters reward and punish these incumbents accordingly, then this is also a conception of the world that truly reflects EV. Parallel to this, Rodden and Wibbels (2010) argue that national incumbents are assessed economically in elections that are held at different levels: 'voters observe one set of national outcomes (say GDP growth or unemployment), and punish and reward the governing party at the national level *across levels*' (p. 633, emphasis added). Bosch (2016) brings together some of what Gélineau and Bélanger (2005) suggest for regional incumbents and some of what Rodden and Wibbels (2010) suggest for national incumbents and consequently distinguishes two different voting patterns that may occur in regional elections due to economic assessments. Genuine regional EV is the reward or punishment received by the *regional incumbent*, whereas second-order economic voting is the reward or punishment received by the *national incumbent*, but both effects are triggered in regional elections, and both are due to economic assessments.

And third, only three papers (to the best of my knowledge) have convincingly blended EV and SOE accounts to analyse EP elections. Kousser (2004: 1) starts by doubting that the vote losses that national incumbents often suffer in EP elections are due to the mere passage of time within the FOE cycle, as the SOE model asserts. Instead, he wisely hypothesises that the U-shaped pattern expected by the SOE model is a result of macroeconomic performance. The findings confirm that voters for the national incumbents shift their vote (or not) in EP elections depending on economic performance. Thus, a mixture of the SOE model and EV is in operation during EP elections, which is a novel finding. Although the paper is clearly a cornerstone for the 'common ground' I am looking for, it also displays some drawbacks that suggest an upgrading is needed. The necessary individual-level data were not available to Kousser

5. Likewise, some authors have also analysed EV in local elections (e.g. Fauvelle-Aymar & Lewis-Beck, 2011; Martins & Veiga, 2013; and Jastramskis, 2014).

(something that he confesses on p. 7). He thus had no option but to rely only on a very small sample of aggregate data ($n = 64$), leading to his levels of significance being statistically weak (pp. 10, 15). His data also refer exclusively to the last century. In addition, this explanation of EP voting patterns was afforded limited space in an article where he also gave other explanations (protest votes, strategic voting, etc.), and so he was unable to elaborate further on his findings. Finally, we know now – with the benefit of hindsight, of course – that the models are possibly underspecified (p. 10).

Fernández-Albertos (2012) makes another attempt to blend the SOE and EV models to account for EP election results. He envisages two main ways in which the economy might influence voting during EP elections. In the ‘Europeanist’ interpretation, the voters would reward or punish the *EU incumbent parties* depending on economic performance. Conversely, the ‘national’ interpretation upholds the SOE argument that EP elections are fought over national matters and, thus, voters would use economic performance to reward or punish the *national incumbents* (pp. 228–232). The findings verify this second interpretation: more positive economic assessments increase the vote for national incumbents even if the elections are not national. And the findings reject the first interpretation: more positive economic assessments do not significantly increase the vote for the EU incumbent parties. The main limitation of the paper is that as much as half of it examines only one of the 27 EU member states (Spain), thus limiting its scope and explanatory power. In addition, the fact that the paper was written in Spanish has greatly limited its impact. Again, an upgrading is needed.

Finally, Magalhaes (2016) is the third paper that combines a typical SOE analysis (such as the national incumbent’s loss of support – or the protest vote – in EP elections) with typical EV concerns (such as the effects of the incumbent’s performance and fiscal austerity). Even the models combine variables of a distinctly SOE style (such as party size or a honeymoon dummy) with variables of a clear EV style (such as the size of fiscal austerity or growth in GDP). One of the findings is closely linked to the interests of this paper. It shows that a voter’s perception of the national incumbent’s performance clearly influences his/her electoral defection in a SOE, such as the 2014 EP election. And what is even more interesting is that this influence is much stronger in high austerity countries. Despite the appropriateness of the article, there are two reasons to complement it with further analysis. First, the article’s point of departure is that the 2014 EP election was highly exceptional due to the financial crisis, and that this exceptionality led voters to decide the way they voted on the basis of incumbent performance, not policy proposals. Given that my interest here lies in these findings, I should extend the analysis to many other elections, before and after this exceptional one. Second, the article uses the survey question on ‘government approval’ to assess the national incumbent’s performance. However, this question does not explicitly refer to *economic* performance, which is my focus of interest. Voters may approve or disapprove of the incumbent due to economic performance or for many other reasons. This

is why conventional EV studies tend to use the survey question on ‘evaluation of the economic situation’ instead. Replicating the analysis with this more conventional survey question would improve comparability.⁶

2.4. Hypotheses

Before going into the actually substantial hypotheses of the article, I should first make more explicit the assumption that is often implicit in the literature. Note that the revised EV literature poses that national elections are about rewarding and punishing national officeholders for the state of the economy. But no parallelism for EP elections is explicit in the EV literature: it is implicit that EU officeholders are not rewarded and punished in EP elections for the state of the economy. And there are good reasons for not assessing EU officeholders because the very concept of ‘EU officeholders’ is highly problematic. Even assuming that the EU equivalent of national incumbents is the European Commission, such a process of electoral reward and punishment would be complex to hypothesise due to four reasons. First, voters cannot assess the whole Commission during EP elections, but only one of its members: the national Commissioner (or rather, his/her party). Second, EP elections have no influence on the appointment of national Commissioners, since this depends on agreements made in the national arena long before the EP elections take place. Third, there is plenty of evidence that voters are not familiar with the EU executive (see, e.g., Clark, 2014). And fourth, the media often depicts EU Commissioners as technocrats rather than as accountable party representatives.

Since science always makes hypotheses explicit, these should not be reasons for hiding the hypothesis under an implicit sort of permissive consensus. Conversely, these are good reasons to explicitly hypothesise that voters do not hold EU officeholders accountable in EP elections. In sum, we have to postulate a sort of initial ‘null hypothesis’ maintaining that clarity of responsibility does not apply to the European Commission, and that the chance of electoral reward/punishment to the national Commissioners’ parties is unlikely.⁷

6. In addition to the three papers mentioned here, two other remarkable articles found that some voters perform an economic assessment of national incumbents during EP elections. However, these articles do not aim to blend the SOE and the EV models. On the one hand, Carrubba and Timpone (2005) use a mainstream SOE explanation as their starting point (p. 262), with no explicit economic motivations (or rather, just a footnote on page 267). However, when operationalising the model, the authors unexpectedly came up with independent variables of a clear economic nature. On the other hand, Tilley et al. (2008) is a clear-cut EV article that uses EP data only because it is the closest the authors have to *comparable* national elections. The only references to the SOE model are a paragraph on page 666 and two and a half lines on page 681. Note this is not a critique of these brilliant articles – it only points out their objects.
7. A clever alternative was devised by Hobolt and de Vries (2016). Even if the electorate is not capable of attributing responsibility to the EU executive, they can easily locate the EU opposition: Eurosceptic parties. Consequently, the economic crisis favours Eurosceptic electoral results. This ingenious alternative to my Hypothesis 1 goes beyond the object of the present article, which is limited to incumbents’ electoral fortunes.

Hypothesis 1. No ‘Genuine European EV’: a more positive evaluation of recent economic performance does not increase the probability of voting for Commissioners’ parties in the EP elections.

Note that H1 is equivalent (in negative form) to Fernández-Albertos’ (2012) ‘Europeanist’ interpretation and roughly comparable to Bosch’s (2016) ‘genuine regional EV’. Even if H1 is eventually verified, this should not mean that citizens’ economic evaluations do not influence their votes in the EP elections. Conversely, I should proceed to test the alternative substantial hypotheses that the revised literature suggests.

In view of the revised literature, my second hypothesis expects some correspondence to appear in the relationship between citizens’ economic evaluations and their vote choices in the EP elections. According to the studies mentioned, the elections under analysis should be characterised by a process of reward/punishment to the national incumbents for the state of the national economy – even if the elections are not conceived as an exercise of accountability for national incumbents. Note this is equivalent to Fernández-Albertos’ (2012) ‘national’ interpretation and comparable to Bosch’s (2016) second-order EV. It also takes up the somewhat forgotten referendum theory (Tufte, 1975) and the barometer elections concept (Anderson & Ward, 1996). Therefore, Hypothesis 2 is as follows:

Hypothesis 2. Second-order EV: A more positive evaluation of recent economic performance increases the probability of voting for the national incumbent’s party/ies in the EP elections.

The revised literature (particularly Lobo & Lewis-Beck, 2012) also suggests that the European integration process will modify citizens’ allocation of responsibility between national and European executives. If many citizens perceive that the integration process transferred economic responsibility from the national government to EU institutions, this should weaken second-order EV, because these citizens would be less likely to use these elections to reward and punish national incumbents. It is irrelevant here whether this perception is indeed the result of an objective transfer of economic responsibility or whether it is the result of any other adjustment in citizens’ perceptions. I thus formulate Hypothesis 3 as:

Hypothesis 3. Integration: A higher attribution of economic responsibility to the EU (and not to the national government) decreases the coefficient in H2.

According to the contributions of the literature on the clarity of responsibility, coalitions blur responsibility and weaken national EV – and vice versa for single-party cabinets. Transferring this pattern to the phenomenon analysed here, I expect the following Hypothesis 4 to hold:

Hypothesis 4. Clarity of responsibility: The higher the prominence of the main incumbent in the national cabinet, the higher the coefficient in H2.

3. Data and methods

3.1. Data

Most of the article uses individual data taken from the voter component of the European Election Studies. I merged the 2004, 2009, 2014, and 2019 files, thus compiling a data file of 112,532 respondents. Moreover, the article also uses data measured at an aggregate level: the data to measure the prominence of the main incumbents in the national cabinets during each legislature were taken from Döring and Manow (2018), and the Commissioner's party for each legislature was taken from the Commission's website (European Commission, 2021). This aggregate data file contains 110 'legislatures'. Specifically, one for each country for each of the four time points: 24 countries in 2004, 28 countries in 2009, 29 countries in 2014, and 29 countries in 2019. For the purpose of replication, interested readers may download the data files used in this paper from: Merged EES datafile⁸ and Aggregate level datafile⁹.

3.2. Variables

In the Appendix (Bosch, 2024), the reader will find the wording of the questions, how the variables were recoded, how the indexes were computed, the exact meaning of each variable, the warnings on the proper measure for each job, the treatment for the two Belgian subsamples, etc. But briefly stated, the variables used are the following. The *dependent variable* in Models 5–7 is a dummy indicating whether the respondent voted for the national main incumbent in the EP election. Conversely, in Models 1–4, the dependent variable is another dummy indicating whether, in each country and for each election, the respondent voted for the party holding that country's EU Commissioner (see Bosch, 2024). Note the Commissioner's party is often the main national incumbent party, which could give rise to a problem of observational equivalence between the two. However, the contrary is also frequent in our sample, since the post may have been appointed by the previous cabinet, awarded to a minor cabinet party, etc. At the end, Cramer's V is only 0.30, which rules out observational equivalence. The main *independent variable* is the retrospective economic evaluation. The *control variables* included are age, education, gender, and support for European integration. Three political indicators are also included as control variables with the purpose of reducing the danger of party bias: ideological distance from the incumbent party; closeness to the incumbent party; and the vote recall in the previous national elections. The vote recall

8. https://uab-my.sharepoint.com/personal/1000337_uab_cat/_layouts/15/onedrive.aspx?id=%2Fpersonal%2F1000337%5Fuab%5Fcat%2FDocuments%2FVaris%2FBosch%202024%20merged%20EES%20datafile%2Esav&parent=%2Fpersonal%2F1000337%5Fuab%5Fcat%2FDocuments%2FVaris&ga=1

9. https://uab-my.sharepoint.com/:x/g/personal/1000337_uab_cat/EffuQq63BNhF-ljvqQxG63Gkb1K1vp6aFnfDHnlgID4xNtA?e=j8TZE7&wdLOR=cE6EF658C-5879-BA4C-BD6D-9E3808E12793

Table 1. Descriptive statistics for the main variables

	Valid N	Missing	Min.	Max.	Mean	Standard deviation
Voted for the main incumbent	59,837	52,695	0	1	0.27	0.44
Voted for a Commissioner's party	59,837	52,695	0	1	0.21	0.41
Retrospective economic evaluation	107,676	4,856	1	5	2.57	1.09
Education level	112,532	0	0	95	20.41	6.75
Gender	112,532	0	0	1	0.54	0.50
Age	112,532	0	14	101	48.79	17.05
Support for European unification	100,620	11,912	0	10	5.12	3.07
Ideological distance to the main incumbent	87,411	25,121	0	10	2.97	2.69
Party closeness to the main incumbent	109,868	2,664	0	3	0.26	0.68
National vote recall	75,080	37,452	0	1	0.34	0.48
EU responsibility on the economy	53,290	59,242	-10	10	-1.33	2.97
Main incumbent cabinet share	110	0	0.18	1	0.70	0.23

Note: The 110 cases for the variable Main incumbent cabinet share refer to the 110 legislatures analysed (24 countries in the 2004 election, 26 countries plus 2 Belgian subsamples in 2009, and 27 countries plus 2 Belgian subsamples in 2014 & 2019). These are exactly the same that are introduced as fixed effects.

Source: Own elaboration through Merged EES datafile and Aggregate level datafile (see Section 3.1).

variable is possibly the strongest control variable I could include in the model in order to restrict the danger of party bias in the relationship. I also include two *moderating variables*, conceived to interact with economic evaluations. The first of them is EU economic responsibility, which indicates whether the respondent attributes more economic responsibility to the EU rather than to their national government. The second is the main incumbent's share of the national cabinet at the time of the EP election (see Bosch, 2024). This was included in order to assess the clarity of the main incumbent's responsibility and to test H4. Note that this variable is measured at the aggregate level (in the 110 'legislatures'), as stated above. Table 1 reports the descriptive data characterising these variables.

3.3. Models and methods

Since the dependent variable is a dummy, I shall compute logistic regression models to analyse the relationship. However, the literature has shown that linear probability models are a good alternative for the estimation of dummy dependent variables (e.g. Hellevik, 2009). I estimated both types of model and confirmed that the results do not differ. In the tables in the article itself, I report the linear regression coefficients because their interpretation is much simpler and move the logistic results to the Appendix (Bosch, 2024). Model 7 is different because one of its independent variables (the main incumbent's share of the cabinet) is not measured at the individual level but at aggregate level and the model includes a cross-level interaction. Thus, Model 7 is a mul-

Table 2. Genuine European EV in European Parliament Elections, 2009–2019

	Model 1	Model 2	Model 3	Model 4
Retrospective economic evaluation	0.023*** (0.002)	0.021*** (0.002)	0.001 (0.002)	−0.002 (0.002)
Education level		0.000* (0.000)	0.000 (0.000)	0.000 (0.000)
Gender		0.011*** (0.004)	0.014*** (0.003)	0.011*** (0.003)
Age		0.002*** (0.000)	0.001*** (0.000)	0.000*** (0.000)
Support for European unification		0.006*** (0.001)	0.003*** (0.001)	0.003*** (0.001)
Ideological dist. to Commissioner's party			−0.029*** (0.001)	−0.018*** (0.001)
Party closeness to Commissioner's party			0.330*** (0.003)	0.212*** (0.003)
National vote recall				0.401*** (0.005)
Constant	0.059*** (0.014)	0.159*** (0.014)	0.111*** (0.014)	0.085*** (0.013)
Adjusted R squared	0.106	0.110	0.481	0.573
Number of legislature fixed effects	85	85	74	74
<i>n</i>	43,900	41,561	33,916	33,916

Notes: Cells display the regression coefficients with the standard errors in parenthesis. Dependent variable refers to whether the respondent voted for an EU Commissioner's party or not. Bosch (2024) provides two additional steps for Models 1 & 2.

Significance levels: *** $p < 0.01$; ** $p < 0.05$; * $p < 0.10$

These models do not contain 2004 data because 'Commissioner's party' was indeterminate

Source: Own elaboration through Merged EES datafile and Aggregate level datafile (see Section 3.1).

tilevel linear probability model. Admittedly, I could have used multilevel linear probability not only in Model 7 but also in all other models, since legislatures are, after all, aggregate variables. Instead, I decided to include legislature fixed effects in the models because the literature (e.g. Möhring, 2012) considers that plain fixed effects suit this data structure better than a multilevel configuration.

4. Findings

Regarding Hypothesis 1, the results displayed in Table 2 show that evaluating recent economic performance more positively of does not increase the probability of voting for the Commissioners' parties in the EP elections. These results appear to conclude that H1 has been verified; but more rigorously and given that H1 was posed as a sort of preliminary null hypothesis, we should rather conclude that the results do not allow to reject the null hypothesis of no relationship. Admittedly, there is a certain bivariate relationship (Model 1)

but once political controls are in place (Models 3 and 4), the relationship completely vanishes, the coefficient sign wobbles, and its significance disappears. In other words, if voters who consider that the economy is doing well have a higher probability of voting for a party holding a Commission post, this is not due to this economic evaluation. Instead, their vote is due to pre-existing political sympathies to which economic evaluations are not adding anything significant. Given the importance of this hypothesis for the whole article, I replicated the models with a country-by-country (and election-by-election) analysis. The Appendix (Bosch, 2024) displays some particular results for some isolated countries.

The conclusion that EU officeholders are not held responsible for economic conditions when ballots are cast in elections to the EP should not mean that economic punishment and reward are completely absent from the European voter's mind. Hypotheses 2–4 examine other types of EV, particularly second-order EV, in which the main national incumbents are rewarded or punished in EP elections for the state of the economy. Regarding Hypothesis 2, Table 3 shows that the coefficient for the retrospective economic evaluation is significant in Model 5 – the logistic models in the Appendix (Bosch, 2024) give the same results. However, attaining statistical significance is not enough. Following Bernardi et al. (2017), scholars should also test their models' substantive significance, so I did this looking for a benchmark. Thus, I replicated the models by switching the dependent variable to voting for the national incumbent in national elections. As reviewed in Section 2.2, there is certain academic agreement that this effect is present in national elections. The results are highly encouraging since the coefficients in Model 5 are not weaker than their equivalents in the benchmark. Therefore, the coefficient does not only attain statistical significance but also proves to be substantively significant. This result makes it clear that citizens' economic evaluations do indeed influence their tendency to vote for the main national incumbent's candidacies to the European Parliament. Thus, the process of reward/punishment towards the national incumbents due to the state of the national economy is definitely operational in EP elections, although elections were never conceived as an exercise of accountability for national incumbents. Even with the most demanding controls introduced to avoid party bias the EV coefficient maintains its significance: second-order EV is solid and Hypothesis 2 is clearly verified.

The results in Table 3 show that the verification of Hypothesis 3 is more problematic. The table displays extremely weak evidence that a higher attribution of economic responsibility to the EU might influence the strength of the relationship between economic evaluations and vote choice in EP elections. Although the interaction coefficient maintains the expected negative sign even when subjected to the most demanding controls (see the Appendix for the steps of the successive models that each have more controls; Bosch, 2024), its significance is deficient (0.73) so I will avoid commenting on this coefficient. Alternative operationalisations of EU economic responsibility

Table 3. Second-Order EV in European Parliament Elections, 2004-2019

	Model 5	Model 6	Model 7
Retrospective economic evaluation	0.016*** (0.001)	0.013*** (0.002)	-0.004 (0.005)
Education level	0.000 (0.000)	-0.001 (0.000)	-0.000** (0.000)
Gender	0.007*** (0.003)	0.009** (0.004)	0.007*** (0.003)
Age	0.000*** (0.000)	0.000 (0.000)	0.000*** (0.000)
Support for European unification	0.001*** (0.000)	0.002*** (0.001)	0.002*** (0.000)
Ideological distance to the main incumbent	-0.015*** (0.001)	-0.014*** (0.001)	-0.015*** (0.001)
Party closeness to the main incumbent	0.177*** (0.002)	0.169*** (0.003)	0.177*** (0.002)
National vote recall	0.432*** (0.004)	0.464*** (0.005)	0.432*** (0.004)
EU responsibility on the economy		0.003** (0.002)	
EU responsibility x economic evaluation		0.000 (0.001)	
Main incumbent cabinet share			-0.052 (0.031)
Cabinet share x economic evaluation			0.027*** (0.006)
Constant	0.006 (0.012)	-0.032 (0.017)	0.087*** (0.024)
Adjusted R squared	0.618	0.646	
Number of legislature fixed effects	106	55	
<i>N</i>	43,794	20,692	106 Level 2 43,794 Level 1

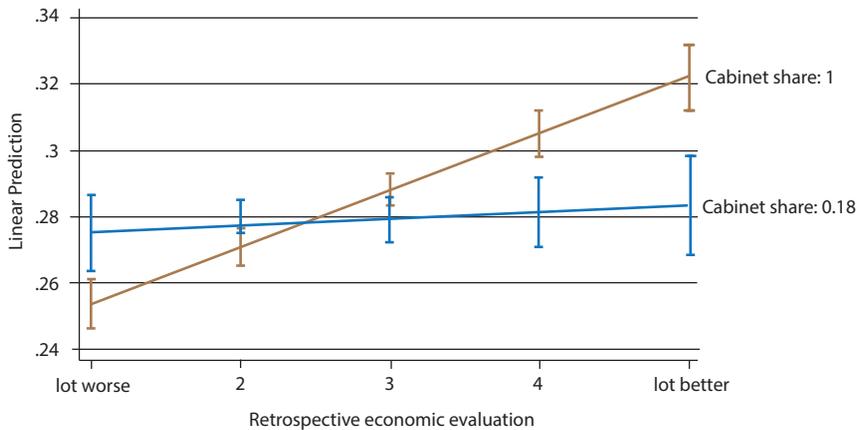
Notes: Cells display the regression coefficients with the standard errors in parentheses. Dependent variable refers to whether the respondent voted for the main national incumbent or not. Bosch (2024) provides additional steps for Model 5.

Significance levels: *** $p < 0.01$; ** $p < 0.05$; * $p < 0.10$

Model 6 has a much smaller n because 'EU responsibility' was only asked in 2009–2014

Source: Own elaboration through Merged EES datafile and Aggregate level datafile (see Section 3.1).

were examined but the results did not improve (see the Appendix; Bosch, 2024). I also replicated the analysis in each of the 28 country subsamples where the question was asked in 2009, and the 29 country subsamples where the question was asked in 2014. Although a few weak intriguing patterns appear in three legislatures (see the Appendix; Bosch, 2024), no significant

Figure 1. Marginal effects of Retrospective economic evaluation

Notes: Simulation for maximum and minimum cabinet shares (0.18 and 1). Predictive margins with 95% CIs

Source: Own elaboration through Merged EES datafile and Aggregate level datafile (see Section 3.1).

interaction emerges in most of them.¹⁰ I could not verify the idea that a higher attribution of economic responsibility to the EU might weaken the second-order EV nature of EP elections. Hypothesis 3 is therefore not confirmed.

Model 7 assesses the clarity of responsibility hypothesis (H4). The crucial row in this table is the interaction between retrospective economic evaluation and main incumbent cabinet share. The coefficient for this interaction shows a clear regularity for the main national incumbents: the higher their cabinet share, the stronger the effect of retrospective economic evaluations on their vote in EP elections. It is worth restating that this effect occurs in EP elections, which do not evaluate national incumbents. Thus, Hypothesis 4 is fully confirmed: the main incumbents that control a larger portion of the national cabinets receive electoral rewards and punishments for the economic situation more clearly. Correspondingly, this electoral consequence is somewhat blurred when the main incumbents control a smaller portion of the national cabinet. Figure 1 shows the interaction marginal effects with

10. The models for Greece in 2009, Italy in 2009, and Spain in 2014 show no signs of a significant interaction when the analysis does not include control variables (the significance levels for the interaction coefficient in Model 6 fluctuates around a figure as low as 0.70). However, their interaction coefficients suddenly emerge as modestly significant (and with the hypothesised negative sign) when political controls are introduced. The evidence is very weak, and this sudden emergence of a significant coefficient suggests the existence of a collider bias (Elwert & Winship, 2014; Lee et al., 2019). However, the abundance of countries from southern Europe among the few moderately significant results might not be a coincidence. Note that this ‘integration hypothesis’ was proposed in a study of Greece, Italy, Spain, and Portugal (Lobo & Lewis-Beck, 2012).

the two extreme values of cabinet share and confirms this effect. When the national executive is a single party cabinet (i.e. share = 1), an improvement in economic evaluations greatly increases the probability of voting for the incumbent in the EP elections (the line is steep). However, when the main incumbent holds only 0.18 of the cabinet (the lowest main incumbent cabinet share in the sample), an improvement in economic evaluations does not increase the probability of voting for the main incumbent in the EP elections (the line is clearly flat).

The Appendix (Bosch, 2024) displays simulations with other cabinet shares: only main incumbents with shares above 0.4 or 0.5 should start noticing the electoral effect of a variation in economic evaluations. Note that the non-significant coefficients for the main effects in Model 4 are not at all disturbing. They merely indicate the electoral effect of the economic evaluation when the main incumbent holds 0% of the cabinet (which is obviously impossible) and the electoral effect of the cabinet share when the economic evaluation is 0 on a scale of 1 to 5 (also impossible).

Even though it is not the aim of the article, these results may be useful for contributing to two discussions: one a classic debate in EV and the other a classic debate in SOE. The EV literature often debates whether EV is retrospective or prospective. The results in the Appendix (Bosch, 2024) show that a prospective economic evaluation produces a slightly worse fit in the models than a retrospective one. Meanwhile, the SOE literature often discusses whether EP elections are gradually losing their second-order nature. The results in the Appendix (Bosch, 2024) offer the opportunity of taking up this debate again with regard to the peculiar version of second-order voting studied here (second-order EV), since we can monitor the trend in the EV coefficient through the successive EP elections. Disappointingly, the results are inconclusive. It is true that a certain pattern of decline may be noticed, but this trend fluctuates depending on the control variables introduced in the model (with few controls added, it even displays an upward trend). Moreover, the coefficients for the 2014 time-point are artificially low,¹¹ which disturbs the linear trend. Again, even though it is not the aim of the article, the estimated models offer some collateral findings about voters' behaviour in EP elections. Table 2 and 3 show that women have a higher probability of voting for the main incumbent. Age and education level also come into play: older people have a higher probability of voting for the main incumbent, and the higher the voter's education level, the lower the probability of them voting for the main incumbent. In some models, however, these two relationships seem as if they operate through the existence of deeper political sympathies.

11. It is usual that EV models worsen in contexts of deep economic crises due to an artefact in the estimation process known as 'the restricted variance problem' (Frailé & Lewis-Beck, 2014). And one of the symptoms of such a worsening is an artificially low coefficient for the retrospective economic evaluation.

5. Conclusion

This article seeks to help explain voters' behaviour in EP elections. Traditionally, these elections have been explained through the SOE framework (which leaves slight ground for EV explanations). At the same time, EV models initially avoided dealing with EP elections (assuming the attribution of economic responsibility only happened in national elections), and when they later analysed EP elections, they paid incomplete attention to previous SOE contributions. However, this article has shown that EP elections display a clear and novel second-order economic voting pattern: even if EP elections are not supposed to evaluate national incumbents, the empirical analysis revealed that voters tend to use EP elections to reward and punish national incumbents for the state of the economy. A blend of both frameworks (SOE and EV) is a better explanation for voters' behaviour during EP elections. The empirical analysis also verified that this second-order EV pattern occurs more frequently when the main national incumbent occupies a major share of the cabinet, and that when the main national incumbent's share diminishes, the second-order EV pattern also weakens. On the negative side, there is also a non-finding. The article has been unable to verify an EP version of Lobo and Lewis-Beck's (2012) integration hypothesis. I cannot confirm that a higher attribution of economic responsibility to the EU weakens the second-order EV patterns in EP elections.

This article tells a sad story of compartmentalisation of knowledge. The two traditions referenced here worked in isolation for too long, with only scant exceptions. However, reality is a melting pot, and this empirical analysis has revealed that second-order EV is not only an appealing theoretical notion, but that it also offers a more convincing explanation for citizens' behaviour in EP elections. Future analyses of not only EP elections, but also of other types of SOE (regional, local, etc.), could greatly benefit from this notion. Just like any academic idea, a good deal of theoretical refinement and further empirical research needs to be performed. First, more attention should be devoted in the future to the endogeneity problem in second-order EV. Even if very strict control variables have already been included in the models, another way to restrain the endogeneity problem would be to plug some instrumental variables into the model such as the objective GDP and objective unemployment for the countries and years included in the analysis. Or better still, the study should come down to the regional and/or sectoral level, which would generate more variance. Second, length of incumbency is also a variable worth analysing in the future since it fits both traditions. In the SOE framework, the election cycle feature essentially captures length of incumbency. And in the EV tradition, length of incumbency conceivably increases clarity of responsibility (van den Brug et al., 2007: 56). Third, it should also be assessed whether the perceived importance of the economy as a political issue might regulate the strength of second-order EV patterns. It is plausible that this phenomenon occurs more strongly in moments and places in which the economy is seen

as more relevant. And fourth, further research could also reconsider the – currently oversimplified – dependent variable. Following van den Brug et al. (2007: 174), it is sensible to expect that not only the main incumbents are affected by second-order EV patterns, but that others, such as minor incumbents, main opposition parties, etc., are also affected by them.

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