

## MEDem objectives

### *1. Mitigating societal and political challenges*

Monitoring Electoral Democracy (MEDem) *brings together scattered projects, research programmes and infrastructures* (national, European and international) with the objective of adding value to data already collected or in the process of collection. These data, because of their origins in separate projects – e.g. focused on either political parties or on voters or on media outlets or on policy formation, do not currently lend themselves to being combined and analysed in conjunction for comparative and over-time analysis. The objective of MEDem is to provide the foundations for an eventual infrastructure that will bring together, integrate, leverage and build upon existing datasets and projects to transform the study of electoral democracy.

MEDem will *contribute to Open Science* will create a single point of access for many different data sources, and make them altogether FAIR. It will also design and implement procedures for ensuring post-harmonization of existing data and, eventually, *ex-ante* (pre-)harmonization of newly collected data. This will make it possible for these data to be employed for investigating new research questions, shedding light on fundamental puzzles regarding democratic governance.

Well-functioning democracies lie at the heart of modern Western societies as they provide for citizen representation in the executive and legislative branches of power. To examine in depth *how citizens, elites, parliaments, governments and media interact and relate to each other* in the democratic process is central for the understanding and management of sources of friction (both social and institutional) in modern societies.

The present moment is one in which democracies face a number of very evident challenges. To name a few:

- *COVID-19 will have long-term political and economic consequences.* The current and future decisions on how to respond to the COVID -19 pandemic will reshape politics and society for years to come.
- A wave of *populism and nationalism* is visible in Europe that challenges established institutions of representative democracy and parties;
- The *digitalization* of society imposes changes in interpersonal and political communication and can bring about changes to the way elections are being conducted – indeed to the very ways in which electoral systems function;

- Established *media systems are under pressure* as they experience the erosion of their previous business models. Many people obtain information of political relevance through social media platforms, and this information is often selective and sometimes biased. In addition, attempts to manipulate elections with fake news, in some cases even from foreign governments, have become worrying in several countries;
- *Party systems*, having been stable for a long time, *have recently been shaken* in many countries, with established parties struggling or disappearing and new parties and politicians appearing on the scene and even achieving government office;
- We are witnessing a *backlash against liberal democracy* in a number of countries that threatens to eroding commitment to core liberal democratic values, such as judicial independence, freedom of the press, and the right to effective opposition;
- *European societies are transforming* due to processes such as migration, urbanization and demographic changes. European societies are also aging. Such changes in social structure pose challenges to virtually all functions of democracy;

To *understand democracies is as crucial as ever in times of crisis*. Policy-makers need to understand the causes and consequences of new political developments in order to respond to challenges. Democracies are complex socio-political and economic systems whose workings *as systems* require considerable information regarding their different parts if we are to properly understand the outcomes of processes by which political decision are made.

A variety of ongoing research projects and collaborations have permitted various research communities to focus on individual components of the democratic process. What is missing is a bridge between these components that would facilitate study of the interactions between different actors. Such a bridge will *unlock the potential in data collected by individual scientific projects for illuminating the workings of democratic processes as a whole by means of a substantial data harmonization and integration efforts across projects, where the communities responsible for the different projects agree on joint standards*. Existing projects often including different sets of countries, have idiosyncratic origins in diverse social science subfields with somewhat different objectives and time-spans. The current lack of coordination and integration creates a lot of inefficiencies and has hindered innovation. However, to answer important questions regarding democratic governance requires careful measurement instrumented to capture data regarding processes of electoral democracy for various political actors on various levels of aggregation over time in many countries, calling for a bridge between these different projects.

The strategic goal of MEDem is *to provide that bridge between projects that study electoral democracy, expanding the limits of our collective knowledge by answering scientific questions that can only be*

*answered with data that has been harmonized and integrated across diverse research projects.*

MEDem will serve this strategic goal through the following four objectives:

1. *Bring together* different existing already-funded and running comparative and national projects and serve as coordination hub between these projects. While the projects will remain independent and fund their own data collection, they will also contribute to the various activities of MEDem, which is thus a *community-powered* enterprise.
2. *Expand* the community delivering data to MEDem, and *offer support* for newer data collection and harmonization projects to achieve a more institutionalized status.
3. Create joint *standards*, agreed upon by the research community participating in MEDem. for data collection and harmonization to reach inter-operability regarding concepts, measures, and codes.
4. *Unlock* the potential of existing data by enabling *access to and research utilizing* linked and integrated data

These objectives will be achieved with the support of a wider community of electoral democracy research actors and projects. The MEDem community builds upon important research and collaborative projects conducted in Europe since the 1950s on electoral behaviour, party competition, and election outcomes:

- *National Election Studies (NES)*: Six European countries have conducted studies of electoral voting behaviour, supported by substantial government funding. for fifty years or more. Many other countries have started more recently to conduct national election studies as a systematic and institutionalised endeavor, given that elections are a crucial moment in all democracies. Voter studies call for expensive survey research, so national funding has been considerable, cumulatively totaling hundreds of millions of Euros – a large investment whose total payoff will be much increased by MEDem, through enhancing their re-usability and comparability.
- *The European [Parliament] Election Study (EES)*, conducted for the first time in 1979, created a Europe-wide network of electoral scholars that wanted to study voting behaviour in different countries in parallel over time.
- An important worldwide initiative focusing on individual voter-level data was the foundation of the *Comparative Study of Electoral Systems (CSES)*. CSES is a collaborative effort to develop questionnaire modules that are integrated into national election studies for successive five-year periods since 1996, gathering pre-harmonized comparative data that is now widely used for research.
- Comparative research, however, has not only focused on voting behaviour. Various other comparative projects emerged to study parties, parliaments, and candidates in different countries.

For example, in the framework of the *Manifesto Research on Political Representation* (MARPOR) a group of researchers started already in 1969 to collect data on parties' policy preferences and now has a collection of party positions over a period of 60 years in fifty countries. Such projects involve less financial commitment than do voter studies, but many of them have received extensive government or research council funding.

- The *Comparative Candidate Project* started in 2005 to collect data on candidates in elections. The *Chapel Hill Expert Survey* (CHES) has since 1999 estimated party positioning across countries and issue dimensions using expert evaluations.
- The *Voting Advice Application* (VAA) study group has been in existence since 2009. VAAs collect data on party policy positions as well as on candidate and voter preferences prior to elections.
- The *Comparative Agendas Project* (CAP) assembles and codes information on the policy processes of governments from around the world, with data series from the 1950s or earlier in some countries.

All of these projects have focused on specific components that MEDem seeks to integrate for the benefit of the research community. MEDem covers a number of longstanding and highly sophisticated research subfields within the social sciences, involving literally hundreds of scientists across Europe and beyond in highly productive cutting edge research. An early effort to familiarize scholars with the potential inherent in these data for addressing wider research questions was provided by the Marie Curie Initial Training Network in Electoral Democracy (ELECDEM). In 2010 the Consortium for European Research with Election Studies (CERES) was founded to further advance the integration of national election studies with a view to both post-harmonization of existing data and pre-harmonization of new data collections. CERES was responsible for initiating the MEDem enterprise in 2017 by unanimous vote of scholars representing election and cognate studies in 21 European countries.

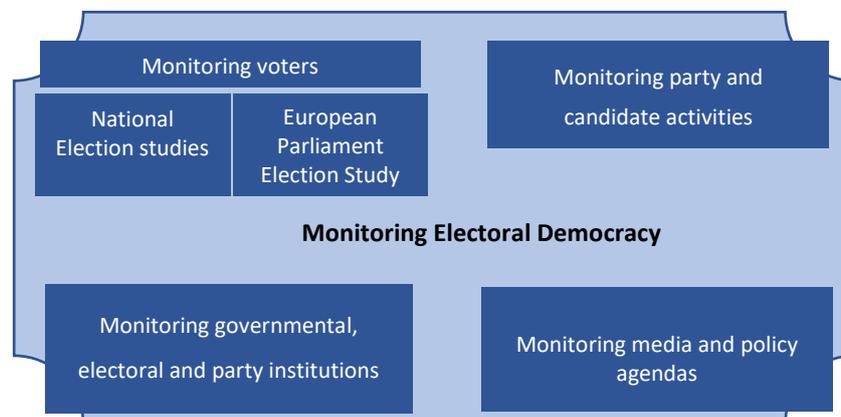
MEDem builds on, consolidates and expands these efforts. All of the above-mentioned projects that continue to collect data have committed to participate in MEDem, with the addition of *Party Facts*, the *Constituency-Level Election Archive* (CLEA), the *Executive Approval Project* (EAP), the *Parliaments and Governments Database* (ParlGov), as well as individual national election studies in 21 European countries. Other less well-established networks of scholars will use MEDem to strengthen their networks, agree on data collection standards, and reach out to additional countries. This is the case for research on Media (including social media) and to Parliamentary Research. In those research areas, there are many national and regional initiatives and projects but they need yet to form strong and coherent comparative projects with data collections that allow for systematic comparative research.

It is the objective of MEDem to *connect this scattered scientific community* and act as a coordination hub that bridges these projects and actors. The hub is structured on the basis of four themes (Figure 1): (a) monitoring voters, that will include all national election studies and the European [Parliament]

Election Study; (b) monitoring party and candidate activities (c) monitoring governmental, electoral and party institutions and (d) Monitoring media and policy agendas. The above mentioned projects and data collection infrastructures will be integrated into these themes, in order to build a self-aware network for the study of electoral democracy.

To this end, MEDem will also *map initiatives that are more isolated* and ensure that their key scientist and data collections can be included into the network at a later point in time. The efforts to bring the community together will be complemented with targeted communication and outreach activities for specific stakeholder groups, as well as with training activities.

**Figure 1 Monitoring Electoral Democracy components**



**2. Offer support for data collection and harmonization projects to achieve a more institutionalized status.**

Many data collection projects within the MEDem framework *are not institutionalized* and do not have any form of stable funding. A number of national election studies, as well as the European Election Study that covers elections to the European Parliament, aspire to become stable data collection projects, run by the community and stably funded by the national governments or research councils. In addition, many projects lack strong governance structure. While MEDem does not plan to take over funding of data collections, MEDem will be able to support projects in gaining stability and sustainability and (at the very least) ensure that data collected by these projects does not get lost through loss of funding or personnel changes. MEDem will support these endeavours by ensuring knowledge transfer regarding the processes and documents needed to lobby with the relevant actors to achieve sustained stability.

Additionally, many comparative projects collecting data from one type of actor (eg. Candidates or Voting Advice Applications) *cover numerous countries but unfortunately, their networks do not overlap completely*. This creates substantial and cumulative gaps once researchers want to use the data in parallel. MEDem will support such networks to fill in their gaps by connecting them with researchers in the missing countries and supporting them to create local networked projects.

Finally, some components of the MEDem data needs are not currently catered by any comparative project. MEDem will encourage researchers and loose networks collecting data of these *newer data types* to collaborate across Europe in providing coordinated harmonized solutions that can then be used by the wider MEDem community.

***3. Create joint standards agreed upon by research communities participating in MEDem for data collection and harmonization, so as to reach inter-operability regarding concepts, measures and codes.***

Evaluations of research conducted by the MEDem community shows that there is *a significant lack of coordination*. Different projects have not been well-coordinated with one another. While, for several projects, the communities of scholars involved do overlap, there is nevertheless no structured and permanent coordination. This inevitably led to lack of inter-operability between projects. The reason is the lack of common standards on concepts, measures and codes used in the different studies. Researchers have had to address these problems individually. Time and again funding agencies receive brilliant applications for research grants, the first part of which involves work on data harmonization. More often than not this harmonization is specific to the proposed work, limited in scope and with grievous deficiencies (because not central to the research for which it is needed) in the manner in which this harmonization is documented and made available to other researchers and the general public. This hinders transparency in science and the ability to evaluate research quality, and most importantly it is a significant barrier against building on existing scientific output.

*MEDem will provide a central framework to ensure this coordination among projects and interoperability among data*. At a first stage it will work on the definition of standards for data integration and harmonization and then take the first steps towards implementing those standards. This work will be done based on existing comparative and national projects, developing their theoretical concerns into a single conceptual map which can provide the basis for establishing relevant software and management tools to facilitate negotiations and agreements between projects on coding and linkage standards. MEDem will also cooperate on standards with ESS ERIC (European Social Survey, which also provides MEDem with data for harmonization), especially on socio-demographics and methodological standards for data collection.

Acceptance of standards will depend on a collaborative and inclusive decision-making processes. It is not possible to impose standards top-down. It requires the deliberation and negotiation of the scientific community involved in the separate data collections. Therefore *MEDem will develop the framework to allow for such deliberation and consensus-building on standards* by establishing basic scientific governance mechanisms.

***4. Unlock the potential of existing data by enabling access to and research with linked and integrated data.***

Most of the data in the MEDem framework are already hosted either in a Social Sciences Data Archive (CESSDA Service Provider) or on a project website. *MEDem will map the data landscape and provide a single point of access for all relevant data* (the linked data created by MEDem). It will do so by creating a data hub that will provide browsing and searching facilities and will then in turn point to the source archive of where the data are stored. This procedure ensures on the one hand that secondary users can easily find and access the data, but at the same time it does not remove the right of the data creators to decide for themselves where their data should be stored and managed. *MEDem will cooperate closely with the CESSDA ERIC* (Consortium of European Social Science Data Archives): several CESSDA data providers (mainly GESIS in collaboration with FORS) will create an integrated data hub and a single entry point for data collections that will eventually be part of MEDem. Through CESSDA, MEDem will also ensure that the data it oversees are inter-operable with other data collections and linked to the EOSC framework, ensuring accessibility by scientific and other users. Access will be online, as the vast majority of MEDem-relevant data are of the non-sensitive type.

MEDem will also begin to *unlock the potential of these data* by show-casing examples of what can be done once these data are linked and integrated. This will be done by engaging the wider community of scholars studying electoral democracy in two research projects. The two broad topics that will be addressed are “challenges to liberal democracy” and “inequalities in representation”. These show-cases will go beyond what is currently scientifically possible, and leverage the MEDem integrated data to address the two topics using a holistic and systemic perspective: comparative, across long periods of time, and linking various political and institutional actors. Research questions include how changes in the democratic process gave rise to support for illiberal policy position and radical populist parties, examining the link between illiberal attitudes and the rhetoric of populist parties, and the moderating impact of the institutional context for the dissemination of illiberal messages in offline and social media. We will also assess how unequal political participation in Europe has consequences for ideological and policy representation by investigating how issue priorities, media and policy-making agendas interact.

## 5. *Networking activities*

MEDem will build on existing collaborative ties between scientists who study electoral democracy in Europe across the subfields mentioned in part 1 and beyond, leveraging their mutual interest in producing data that can be analysed in conjunction. The project mobilizes two types of data collection infrastructures that are key for the study of electoral democracy: comparative projects collecting data across Europe (and beyond) and national election studies.

The MEDem starting community will capitalize on the existing cooperation culture of the wider electoral democracy research community and will take it a step further. It will focus on the common values and goals shared across the relevant actors and foster a culture of mutual exchange of data, with the purpose of releasing hidden value in those data by creating synergies.

The proposed work by MEDem will bring together and integrate on European scale the democracy research community across Europe in many ways. MEDem will

- encourage researchers from different existing projects to start *coordinating* their projects and data collections in a structured way. All of the work packages have built-in networking activities to allow for information exchange on the strategic and the management levels as well as on scientific research;
- promote agreement on *joint standards* as a key element to facilitate various aspect of research in the future and the use in conjunction of different data sources. Inadequate standards on data collection, standards on concepts and measurements, standards on metadata data and documentation and standards on access all are making it difficult and inefficient to currently use data from different sources;
- help stabilize existing projects and create *sustainability*. The future MEDem infrastructure is urgently needed for the political and social science community. MEDem will also allow existing projects to exchange ideas on best practice governance and funding models in order to reach sustainability, which is a problem for many existing projects;
- promote *Joint outreach activities* and the provision of a joint platform to reach out to a wider audience. This will facilitate communication of scientific research and help therefore to create socio-economic impact. Collaboration with publishers will also be established to disseminate research findings from journals to a broader audience;
- organize *training activities* that promote reflection on how to use different data sources in parallel and also train future researchers and bring in new users of the different data collections.
- strengthen collaboration between existing projects and build a governance structure that will then also facilitate *innovation and new comparative research* on electoral democracies. Starting a new

collaborative project currently is a big effort because strong networks only exist in some subfields. The MEDem structure put in place will provide in the future a much more stable platform for scholars to exchange ideas for future research.

#### **6. *Trans-national and virtual access activities***

*Data as well as documentation is and will be available free of charge through the MEDem website and in cooperation with existing data archives as is the standard practice in social and political science. Therefore, there is no need for specific access provisions.* In particular the large projects such as CSES, CCS, CAP, and MARPOR distribute their data to interested researchers without any embargo, so even the researchers responsible for the data collection do not get preferential access. This will also be the case for all MEDem data and resources.

Moreover, MEDem will, facilitate access in additional ways:

- MEDem will create a *single point of access to data and tools and guidance* how to use existing data comparatively. MEDem members include data management and data access infrastructures, such as FORS and GESIS that are designated service providers for CESSDA ERIC. The wider electoral democracy community has good but not perfect data sharing habits. On the one hand, MEDem will support the community in finding the data they need through the establishment of a data hub. On the other hand, however, it will encourage the community to share the collected and harmonized data but also train the community to adhere to data management standards that ensure research transparency and replicability. The CESSDA-related partners such as GESIS and FORS will guarantee the efficient curation, preservation and provision of access to the harmonized and linked data produced by MEDem.
- The proposed project will improve the quality of data that are the basis of all democracy research, by integrating and *ensuring high quality documentation*. This improvement is expected to have enormous impact in the research output. Specifically, we expect all research on the topic to be accelerated, as there will no longer be the need to conduct required data harmonization before any given researcher or research projects sets itself upon answering a research question and testing a hypothesis. This will enable European researchers to compete with US researchers (who have highly integrated data at their disposal) and be world leaders on the topic. The innovation will spread to data collection, enabling *ex-ante* (pre-)harmonization, which in turn will speed up the data life cycle. Scientists, citizen scientists, journalists and policy makers will have a wider data wealth at their disposal to promote scientific and social innovation. Specifically we expect this to lead to

deeper understanding on how politics work in a multi-level multi-actor environment – the equivalent of a Hubbel Telescope for democracy research.

- Access to data and results will go beyond the research community. MEDem also includes within its consortium university actors across Europe that not only engage in research but also act as community and society multipliers. *The results of MEDem research will be disseminated to a wider audience* that includes researchers, journalists, citizen scientists and policy makers. The partnership between data collection infrastructures and data access infrastructures ensures enduring data FAIRness, high scientific standards, transparency and replicability.

### ***7. Joint research activities***

The projects involved in MEDem share *the principle that research data is a public good and should be freely available to all researchers*. This is a condition to be part of MEDem. Data from existing projects are often used in creative ways to respond to new and innovative research questions by researchers that are not involved in data collections themselves. Many existing MEDem projects already have hundreds or thousands of users and many publications come out of them. These researchers are the potential users of MEDem services for their research.

MEDem will keep the same logic but will *facilitate the holistic study of democratic actors and processes in combination with each other*, which is currently possible only to a limited extent. MEDem will allow studies of not just voting behaviour but how voting behaviour influences policy-making in parliament. It will allow explorations not just of the media agenda, but of how the issues covered by the media influence what voters care about and how this shapes the political agenda of parties and governments.

*The combined and linked data sources produced by MEDem will then be available for research to study many aspects of democracies* since the resulting infrastructure will also provide a scientific public good that everybody can use. Since all the different partners involved in MEDem are also research-oriented organisations they will therefore use the MEDem opportunity to advance with selected joint research activities.