

Challenges to Scholarship and Policy During Crises

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Abstract

The COVID-19 pandemic has had a dramatic influence on mortality and public health and generated much speculation on potential impacts on international politics. Fast-moving crises such as the COVID pandemic and 2008 financial crises entail many challenges for scholarship; events evolve rapidly, our prior knowledge base is limited, it is unclear whether existing theories or analogies apply, and new research findings emerge quickly but also erratically. Researchers face demands to engage with policy and general audiences when normal standards of scholarship may be difficult to apply. Crises can also have a dramatic impact on how we conduct research and interact with other scholars. The forum introduction outlines how crises pose challenges for scholarship and policy and the value of approaching crises such as COVID-19 in comparative perspective. Milner highlights the important differences between the immediately observable short-term impact of crises and the more difficult to evaluate long-run impacts. Kneuer examines how crises can impact political change, detailing how COVID countermeasures can serve as a pretext for autocratization and the safeguards afforded by institutions. Solingen examines the impact of serial crises on global value chains and the difficulties in tracing impacts when crises are compounded. De Alba-Ulloa documents how scholars in the Global South and North face similar challenges during the COVID pandemic, but differences in resources to mitigate can exacerbate inequalities. Davies highlights the difficulties in studying public opinion during COVID and need for behavioral data to understand global health emergencies. Ghosn examines dilemmas in interacting with severely affected communities during crises and offers advice on better practices.

Introduction

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The COVID-19 pandemic has had a significant direct impact on mortality and public health. It has also caused much speculation over potential impacts for key outcomes in international studies. The pandemic clearly led to a dramatic immediate reduction in global economic output (e.g., Brodeur et al. 2021), but the long-term consequences are harder to assess. Will the global economy recover quickly as we emerge from lockdowns, or will measures taken fuel inflation and induce long-run structural problems (e.g., Agarwal and Kimball 2022)? Will the pandemic lead to more violence, encourage cooperation, or more unilateralism and efforts to roll back globalization (e.g., Polo 2020; Murshed 2020)? The pandemic has also had dramatic impacts on how we can conduct research and interact with other scholars. This forum reflects on crises, their impacts, and challenges to scholarship and policy.

The COVID-19 pandemic highlights tensions between normal standards of scholarship and the demands of a fast-moving crisis. Scholarship normally emphasizes due diligence and transparency. The research frontier is noisy, and we normally require replication or independent evaluation before accepting findings or revising beliefs (e.g., Miguel et al. 2019). These are helpful ideals and can help prevent us going down wrong paths.

But crises often entail fast-moving events, where knowledge and beliefs may shift rapidly. For an unprecedented situation such as COVID-19 with a new virus, the existing research knowledge base will be limited, and conventional standards for scholarship may be difficult to apply.¹ It is unclear whether phenomena are comparable or if theoretical insights or historical analogies apply.

¹ Greenhalgh et al. (2022) argue that traditional evidence standards should be abandoned when confronted with events as severe as the COVID-19 pandemic. For a critical response, see <https://alasdairmunro.substack.com/p/the-pandemic-evidence-failure?r=1fhmw&s=w>.

Available data are often uncertain and subject to biases. When COVID-19 was first recorded, it was unclear if human-to-human transmission was possible, and fatality rate estimates varied dramatically (e.g., Douglas et al. 2020; Spiegelhalter and Masters 2021). COVID-19 research has relied heavily on pre-prints, which allow for rapid dissemination of potentially life-saving innovations (see Watson 2022). But bypassing peer-review also has costs. Many conclusions advanced in pre-prints have been challenged and sometimes retracted. But once in the public domain, published findings often take on a life of their own, and sometimes fuel conspiracies and lower trust in science. In short, research on COVID-19 has evolved rapidly, with major achievements, but in a noisy and erratic manner, and often generated controversy rather than convergence.

Severe crises often create demand for rapid action, with a less than perfect knowledge base to inform policy responses.² To call for policy “to follow the science” sounds compelling, but it is often unclear what this means in practice. On many issues we lack a clear scientific consensus. Common policies to prevent the spread of COVID-19 such as school closures deviated from World Health Organization (WHO) recommendations, and can have other important negative consequences that must be balanced against any impact on spread (e.g., Li et al. 2022).³ Policy cannot be derived from research alone, but must acknowledge the role of political decisions on objectives and potential trade-offs.

The pandemic has had a major impact on research and professional activities. The International Studies Association’s 2020 meeting was cancelled at short notice, and scholars have had limited ability to meet face-to-face well into 2022. We have learned much about virtual opportunities for research and academic exchange, but online communication is not a perfect substitute for face-to-

² Brecher and Wilkenfeld (1997: 27), e.g., highlight “awareness of finite time for response” as a defining characteristics of international crises.

³ See <https://www.who.int/publications/i/item/considerations-for-school-related-public-health-measures-in-the-context-of-covid-19>

face interactions (see also Chadi et al. 2023). The pandemic highlights inequities in resources and access. Many lack adequate internet access or conditions to work at home. Individuals with care responsibilities can face dramatic losses in time for research while others have fewer distractions and can produce more.

All crises are unique, and the severity of the COVID-19 pandemic calls for important research to detail its consequences. However, the characteristics of specific crises can often be appreciated better by comparing them to others, and we can potentially learn much more from a comparative approach. Before COVID we had the financial crisis - originally a banking crisis in 2008, followed by a global recession and debt crisis extending well into the next decade. The 2022 Russian invasion of Ukraine has led to a cost of living crisis with surging energy costs and reduced access to vital food imports for many countries. In international relations, the term crisis has traditionally been applied to acute situations, with a short time for response (e.g., Brecher and Wilkenfeld 1997). In economics, crises are typically defined as periods of dramatic downturns, and sometimes precisely when we see persistent negative trends (Sufi and Taylor 2021). “Permacrisis” was the Collin’s dictionary word of the year in 2022.⁴ In international studies, the term crisis is now increasingly used for enduring situations or potential future consequences such as the climate crisis, where we lack effective actions or resources to overcome problems.⁵ Crisis are typically thought of as discrete periods, but can obviously vary in degree and intensity, and are sometimes more accurately seen as gradual changes than event or periods with sharp start and end dates.

⁴ <https://theconversation.com/permacrisis-what-it-means-and-why-its-word-of-the-year-for-2022-194306>.

⁵ For example, a banking crisis may be acute in the sense of short time for response on decisions, while economic crises are often defined based on consecutive quarters with GDP contraction or negative trends. The initial fears that COVID-19 could overwhelm health care systems is very different crisis than the challenges posed by an endemic disease with periodic waves and surges (hopefully less severe as populations acquire more widespread immunity).

Crises highlight controversies over causes, likely consequences, and appropriate policies. The contributors to this forum examine crises from a number of different angles and specific applications. Milner highlights how the long-run impacts of crises are often very different from their short-run or immediate consequences, and more difficult to assess. Kneuer details how crises can impact political change, focusing on how COVID countermeasures have often served as a pretext for autocratization as well as safeguards afforded by better functioning democratic institutions. Solingen examines the impact of serial crises—including COVID-19, climate change and geopolitics—on global value chains, highlighting how compounded crises where many things change at the same time make it more difficult to establish individual impacts. Turning to the impact on scholars, De Alba-Ulloa contrasts trends during the pandemic in the Global North and the South and shows how Global South scholars generally have fewer resources to mitigate implications. Davies discusses the difficulties in studying public opinion during an international health emergency, and how research infrastructure limits our opportunities to understand the impact of COVID and views on possible countermeasures. Ghosn examines challenges faces by researchers in interacting with severely affected communities, with advice on navigating ethical dilemmas arising and recommendations for better practices.

As we emerge from the most challenging phase of the COVID-19 pandemics it is tempting to treat this as a once in a lifetime event and hope for the world to revert to a pre-crisis state. We often forget similar global health emergencies in the past such as the 1968 Hong Kong flu pandemic, or how viruses such as SARS and MERS easily could have become more widespread. Power-law distributions show that the risk of very severe events such as large wars or crises can be very high even if we have not seen similar events over long time periods (e.g., Gleditsch and Clauset 2018). Studying crises can help us identify sources of instability and help us develop better theoretical approaches to understanding both stability and change.

Crises in the Short-Term and Long-Run⁶

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Academic research on crises often notes important differences between their short-run versus long-run outcomes. The world has been experiencing a large number of crises lately: the financial crisis of 2008 that affected mostly the developed countries and lasted in Europe into 2010s, the COVID crisis of 2020 and beyond, and the Ukraine crisis beginning in 2014, continuing with the war we are experiencing now. Since 2008 it's been one crisis after the next in international politics and global political economy.

Crises, which are dramatic and often unexpected periods of radical change, produce in their wake unstable and uncertain times. Hence, they pose a lot of dilemmas for social science research. This is especially true since much social science tends to focus on equilibrium situations, rather than ones of change and instability.

Some examples help illustrate the big differences between the short-run and long-run outcomes of crises. Many claimed shortly after the 2008 global financial crisis that little political change was occurring as a result of it (e.g., Bartels and Bermeo 2014). Incumbents didn't get kicked out of office; party systems didn't change much. But ten years on, politics really did start changing. In the developed countries, centrist parties' vote shares declined, party systems changed dramatically, and right-wing populism grew. These events are difficult to causally connect but we have a sense that they were outcomes of the financial crisis (Campbell 2018; Fetzer 2019).⁷ Moreover, many recent challenges to established democracies appear to be connected to ongoing, longer-run effects of the financial crisis.

⁶ Thanks to Thomas Cunningham for research assistance.

⁷ See also <https://www.theguardian.com/business/2017/sep/13/darling-brexite-banking-crisis>.

The COVID crisis is ongoing and we don't know the long-run effects. But they could be very different from any short-run ones, such as the strengthening of incumbent leaders and parties in governments, at least in some developed countries. If you think about the research on the Black Death in the 14th century, it's very interesting. In the short run this horrible disease killed so many people in Europe, and the effects were terrible for the common person. But the long-run effects was to change the balance of power between capital, land and labor, reducing inequality and improving wages and the lives of the working class (Acemoglu and Robinson 2012; North and Thomas 1973; Scheidel 2017; Turchin and Nefedov 2009).

We don't know what the long-run effects of COVID will be, but they could be very different from the short-run effects (see also Kneuer in this forum). As of January 2023, at least 6 million people have died globally from COVID, and suffer debilitating symptoms after infections.⁸ Governments introducing containment measures were rewarded with renewed confidence in some places (De Vries, Bakker, Hobolt, and Arceneaux 2021).⁹ Economic programs to ameliorate the costs of containment initially proved fairly successful, but are now blamed for causing rampant inflation and declining real wages (Agarwal and Kimball 2022). The longer-term consequences of COVID and responses to are hard to assess now.

The war in Ukraine is ongoing at the time of writing, but the short-run effects suggest 1) heavy costs for Russia from this grinding conflict and economic isolation from the West, 2) rising insecurity especially for Europe as its zone of peace ends, 3) growing arms racing globally, and 4) increasing divisions between the East and West. But Russia also has increased export earnings due to higher energy prices even if volumes are down.¹⁰ What do we know about the long-run effects of this? Do we have theories or relevant historical evidence that can guide our predictions?

⁸ <https://ourworldindata.org/grapher/total-daily-covid-deaths>

⁹ Neundorff and Pardos-Prado (2022) suggest that Trump was undermined by his COVID response.

¹⁰ <https://www.reuters.com/business/energy/russian-oil-fuel-revenue-up-even-exports-fall-iea-2022-06-15/>

Will Russia end up worse off or better? Will Ukraine survive as an independent country? Will the EU end up larger and stronger or much weaker? What will China do as a result? In the face of serious economic costs, can the US and EU hold together a coalition to help Ukraine and press against autocratic domination, or will democracies falter globally?

How do we study all of this? The short-run effects are easier to observe directly, but how do we think about long-run effects? How can we forecast and predict in social science and particularly political science (e.g., Gleditsch 2022)?

I think there are two main ways. One is through theory. We make a series of assumptions about the way the world works and develop hypotheses about how those assumptions interact to produce outcomes. This abstract process can lead us to expectations about how a particular event or crisis might play out. We need to examine those assumptions, and ask - say, about the war in Ukraine - is this particular situation reflected in these assumptions? And if so, should we expect the outcomes that the theory implies?

For Realists, for example, this might mean that using assumptions about systemic anarchy and the security dilemma. Russian aggression should have been expected given the eastward expansion of NATO, and the war in Ukraine will likely lead to an increasing spiral of conflicts as all sides feel more insecure (Mearsheimer 2014). Open Economy Politics uses economic models to identify economic winners and losers from policies, who are then assumed to take up conflicting political positions and battle for control over policy direction (Rogowski 1987). This might help explain the backlash against globalization we are seeing, as economic losers battle to gain political advantage in the West and turn back globalization (Colantone and Stanig 2018a, 2018b; Milner 2021). Using theory is one way to make predictions, but is it a good way?

The other main way is through history. Using comparisons and analogies, scholars try to anticipate how current events will turn out. Assuming one can find similar past events, the method is to project those past outcomes onto the future. Scholars look at World War I, for instance, and assess

that tight alliances (so called chain-ganging) helped lead to war then, and hence the tight alliance formations engendered by NATO and the EU might lead countries into war now (Christensen and Snyder 1990). Thus, we use predictions from similar events in history to tell us something about the longer run consequences of current crises. Employing analogies from history to inform foreign policy decision-making, however, is also fraught with issues (see Khong 1992; Neustadt 1988).

Projecting hypotheses from theory and employing analogies from history are two main ways of forecasting and prediction used in social science. They have distinct advantages and problems. Theory and history are not completely separate because many of our theories arise from historical understandings of events, and our histories are often shaped (explicitly or not) by the theories that scholars utilize to explain them. More explicit attention to theory and implied counterfactuals can improve efforts to learn from history or detailing plausible futures.

Focusing on these two main methods is important because what they forecast or predict can have significant effects on policy. In choosing among policies, decision-makers are assessing the potential causal effects of the choices that they could make. Policymakers want to know, for instance, if the release of oil from the US Strategic Reserve will reduce oil prices in the United States. That's a question about causality. Will economic sanctions on Russia reduce Russia's will and capacity to continue or extend the war in Ukraine? These questions are all about causal effects. Answers to them come from the theories that we hold (implicitly or explicitly) about how these actions produce outcomes and from history about how these actions supposedly have worked in the past. Hence, for policymaking, theory and history are both very important since they can provide answers about the causal impact of policy choices.

Finally, crises pose even larger questions about our ability to forecast. They are dramatic turning points where we are not sure that our theories or our historical examples are going to tell us anything interesting because the events are so unexpected and key scope conditions may not hold. Their occurrence means that our theories and historical analogies previously didn't tell us that these changes were likely to happen. Thus, crises in themselves undermine confidence in what we

usually use for prediction. But they can also invite “creative destruction”, set us off in search of new theories, and draw attention to different parts of history.

Crises and Political Change: COVID 19, Autocratization, and Democratic Resilience

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Crises can be transformative events that produce or accelerate political change. The European debt crisis activated new Eurosceptic and populist parties, reshuffling power constellations. The migration crisis in 2015/16 intensified the nationalist-cosmopolitan cleavage. The COVID 19 pandemic was a transboundary mega crisis and an external shock for every country (Boin et al. 2020). Uncertainty about its duration and future risks drove governments in 2020 and 2021 to initiate unprecedented measures, at a scale and intensity not seen since World War II. The 2022 Russian invasion of Ukraine shifted attention away from COVID, but the impact of the pandemic remains far from fully explored, in particular the long-term consequences of crisis management (see Milner in this forum). One key concern is the effects on the health of democracy from dramatic government policies focusing on preventing the spread of infectious disease and mitigating its potential consequences. Many scholars and pundits have worried if democracy could be quarantined or infected by authoritarian measures and practices. Crises are often the hour of the executive, and extensions of executive powers to the detriment of the legislature and control bodies such as the judiciary and the media pose as great a threat to democracy as restrictions on political rights and civil liberties. Another concern was that authoritarian minded leaders could use the pandemic as an opportunity to step up repressive measures and further consolidate autocratic rule.

This section looks at the COVID 19 pandemic and its impact from the angle of comparative politics and research agendas of democracy and autocracy studies. Scholarship aims to provide insights (also for policy makers) about how crises can damage the democratic health of societies and states, or which factors make democracy resilient and effective in crises. For this purpose, the long-term effects of crises must also be considered. The pandemic also inspires new tools for studying democratic health during crisis.

The Pandemic as a Trigger for Autocratization?

The pandemic hit the global community in the midst of a longer trend of democratic regression, with illiberal political leaders, autocratization, and attacks on democratic institutions and principles (see Bartels et al. 2023). The pandemic raised new questions: What is a democratic response to such a major crisis, and what makes a response undemocratic? How do democracies and autocracies govern in a state of emergency and exception? How will this impact political institutions, power constellations, and accountability?

It is a truism that crises are the hour of the executive. Many governments declared a state of emergency or exceptions to enable far-reaching measures to restrict contacts to protect public health and save lives – such as lockdowns, curfews, travel bans etc. (Hale et al. 2020). This caused concern among scholars of democracy and pundits that governing under a state of emergency could undermine democracy and provide a pretext for autocratization. Two aspects in particular sparked interest, namely to what extent we see violations at the domestic level, and to what extent these changes will contribute to global democratic recession.

With regards to the latter, assessments two years after the start of the pandemic assessments suggest that the pandemic did not lead to further autocratization in 2020 and had a limited effect on the general and global downward trend of democracy in 2021 (Hellmeier et al. 2021; V-Dem Report 2021, 2022). Although we see further autocratization, the pandemic does not seem to account for this trend. However, several studies suggest the pandemic intensified already existing democratic deficits or struggles between democratic and anti-democratic forces (Guasti 2020; Youngs & Panchulidze 2020: 21).

What about violations to democratic standards and increased authoritarian practices? This question leads to three research threads (Kneuer & Wurster 2023): First, decrease of democratic quality in established democracies; second, the pandemic as an amplifier for illiberal incumbents to accelerate democratic erosion processes already under way; third, the opportunity for autocrats to instrumentalize the pandemic for increasing repression and control.

For established democracies the impact on elections has been limited. Elections were only postponed in a significant way in the most acute phase of the pandemic in 2020.¹¹ Infringements of democratic procedures were widespread within both democracies and autocracies in 2020, but significantly more in autocracies. Only fourteen countries did not show any violations of democratic standards. However, after the first acute phase of the pandemic countries tended to reverse restrictive measures. There were more decreases than increases in violations over 2020 and limited abusive enforcement of government measures (Edgell et al. 2021). Problems with accountability have been more common, for example when governments failed to properly involve parliaments in decisions or mainly asked parliaments to delegate to the executive. Another problematic practice was the lack of limits to emergency measures or legislation. On the other hand, democratic governments often responded to criticism; in Germany, parliamentarians successfully called for more opportunities to debate measures. Democratic governments also responded to citizen dissatisfaction, for example by rolling back school closures when they became harder to defend. While semocracies have not been completely immune against the violation of democratic rights, procedures and principles, those more committed to protecting democracy before the pandemic also preserved more democracy during the pandemic (Engler et al. 2021). Thus, an important explanation for democratic resilience during crises is the degree to which democratic principles are protected during ‘normal times’.

The pandemic indeed was exploited by some illiberal political who had already engaged in democratic erosion, including e.g. Victor Orbán, Jair Bolsonaro, Narendra Modi, Rodrigo Duterte, Tayyip Erdogan, the Polish Law and Justice (PiS) government, and Donald Trump. In Hungary, an emergency law enabled the government to rule by decree, with 200 decrees issued during the pandemic, including many not clearly relevant to the pandemic such as withdrawing recognition of transsexuals and restrictions on the scope for local authorities. When the state of emergency ended in June 2020, a new law allowed the government to declare a six-month medical emergency

¹¹ See <https://www.idea.int/news-media/multimedia-reports/global-overview-covid-19-impact-elections>.

without prior consultation with parliament and rule by decree. This exemplifies the sophisticated and legalistic way leaders in eroding democracies have instrumentalized the pandemic to expand executive power. The reins were tightened further in many countries under authoritarian rule, including China, Russia, Belarus, Venezuela, Philippines, Egypt, and Eritrea.

Although empirical findings suggest less autocratization induced by the pandemic than feared in 2020 and 2021, the question of potential long-term effects remains open, given the self-strengthened executives relative to other control bodies (Bolleyer and Salát 2021), and the centralization of decision-making power in decentralized states (Hegele and Schnabel 2021). Are such shifts in power temporary or do they signal new laws and governance practices in the longer run? Did crisis management decrease citizen trust in governments and democracy as the best regime type? Did the way governments handled trade-offs between protecting democratic rights and public health impact the relationship between citizen and state?

Over 2022 a general perception has solidified among the public in many countries that the pandemic is "over". But scholars of democracy studies need to investigate the enduring implications on democratic structures, processes and democratic political culture over the post-pandemic period. This research agenda needs to be expanded by aspects such as how the polarizing power of crises may affect social cohesion and democratic stability as well as democratic resilience during crisis. Scholarship on how crises can damage democratic health as well as what factors can make democracy resilient and effective in crises can also benefit from comparing different crises and their effects in the short and long-run.

Free Information Flow and Accuracy as Vulnerable Areas

Government policy and communication can influence freedom of expression and even engage in disinformation, as e.g. Trump and Bolsonaro downplaying the pandemic. How governments managed communication and information during the pandemic contributed to the openness, rationality, and quality of public debate. What long-term effect will we see from information manipulation and discrediting scientific knowledge? Some political leaders have used the

pandemic as pretext to limit public space. The Varieties of Democracy (V-Dem) project argues that violations of media freedom have been the most frequent challenge to democratic standards, recorded in 90 countries (Edgell et al. 2021). This includes limiting access to information, blocking news sites, laws controlling content in media and social media, or arrests on questionable charges such as spreading false news. 39 government engaged in disinformation campaigns.¹²

All regime types intensified interventions in social media, but the nature of interventions differed (Kneuer and Schünemann 2022). Democracies have regulated content, while hybrid and authoritarian regimes have resorted to repressive measures such as shutdowns or throttling. Autocratic leaders watch the activities of democratic governments closely and legitimate abuses as resembling regulations in democracies. When democracies justify content regulation on the premise of protecting against disinformation, authoritarian leaders will invoke the same arguments.

The attacks on accurate and fact-based information – essential in a democratic public sphere – may be the most detrimental effect of the pandemic. In a period of post-truth and increased polarization, the pandemic intensified an epistemic crisis with fundamental uncertainty in access to accurate information and confusion over trustworthiness (Chambers 2020, Dahlgren 2018). As in past crises such as the financial crisis, Brexit, and the migration crisis, a battle for information hegemony became apparent during the pandemic. Governments relied on scientific advice, while public debate often challenged experts in health agencies and medical research - some times in aggressive ways. Right-wing movements seized on public concerns over mitigation measures.

The pandemic has amplified the epistemic crisis, with potentially long-term consequences. In crisis situations, information, knowledge production, and public agendas are contested, especially in digital media. This makes the value of accurate and quality information more salient in many ways, including 1) provision – who provide information and what are their interests?, 2) acquisition – how do people get information?, 3) dissemination - what logics shape platforms and how do users

¹² See also <https://freedomhouse.org/report/special-report/2020/democracy-under-lockdown>

share information?, and 4) accuracy – how can users identify accurate information on the net? Although research interest in information predates the pandemic, it deepened its salience. Democracy studies need to consider media, communication and information when studying the effects of crises on different regime types.

Methodological Implications

Interest in government responses to the pandemic produced new data, indices, and innovative tools for measuring the pandemic’s potential effects on democracy. The Oxford Coronavirus Government Response Tracker offers a complete perspective on responses from the beginning of the pandemic until today (see Hale et al. 2020), covering a broad array of measures and their intensity. It proved seminal for real-time research and analysis of the pandemic. It also made all findings publicly available and more accessible through graphic tools.

Political science has also responded to the pandemic in a rapid and prolific manner. The V-Dem project’s *Pandemic Backsliding Index* captures whether emergency responses pose a risk to the quality of democracy, while the *Pandemic Violations on Democracy Index* considers where state emergency responses violate democratic standards (Edgell et al. 2021).¹³ The latter index includes a new conceptualization on violations in a state of exception, distinguishing infringements on personal autonomy and dignity, sabotaging accountability, and restrictions on media freedoms. These reveal real-world violations to democracy in great detail. The International Institute for Democracy and Electoral Assistance’s *Global Monitor of COVID 19 Impact on Democracy and Human Rights* focuses on “measures or developments that violate human rights or democratic benchmarks, because considered either disproportionate, unnecessary, illegal or indefinite”.¹⁴ The use of visualization, regular updates, and public accessibility provides important lessons for how scholarship can better illustrate trends and present scientific knowledge towards policy makers and

¹³ See <https://www.v-dem.net/pandem.html> and <https://www.v-dem.net/pandem.html>.

¹⁴ See <https://www.idea.int/2020-annual-report/global-monitor-covid-19s-impact-democracy-and-human-rights>

the public. The data developed constitute an important resource for scientific analysis, and can enable monitoring democratic governance and holding policymakers accountable in the post-pandemic period.

International Crises and Challenges to Research on Global Value Chains

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International crises have been conceptualized as economic, military, diplomatic, or other shocks that heighten threats to national or international security and pressure decisionmakers to respond urgently under conditions comparable to “the fog of war” (Brecher and Wilkenfeld, 1997). One generic challenge to scholarship during a crisis is that so many things of interest that are affected by the crisis become moving targets. Tackling phenomena holding “all else is equal” is always elusive, but a crisis, especially one exogenous to the particular phenomenon under study, multiplies the difficulty. Compounding crises superimposed on each other magnifies the problem severalfold, raising huge challenges to scholarship. How does one separate the effects of each crisis on the phenomenon being explained? The sequence of global crises in recent years, from the US China trade and technology war through COVID, extreme weather events, and Russia’s invasion of Ukraine exemplify precisely that kind of challenge. This section profiles the evolution of a research agenda on global value chains (GVCs) in international conflict and cooperation. GVCs have been buffeted by concatenated shocks and crises that impacted the direction of my research since 2013

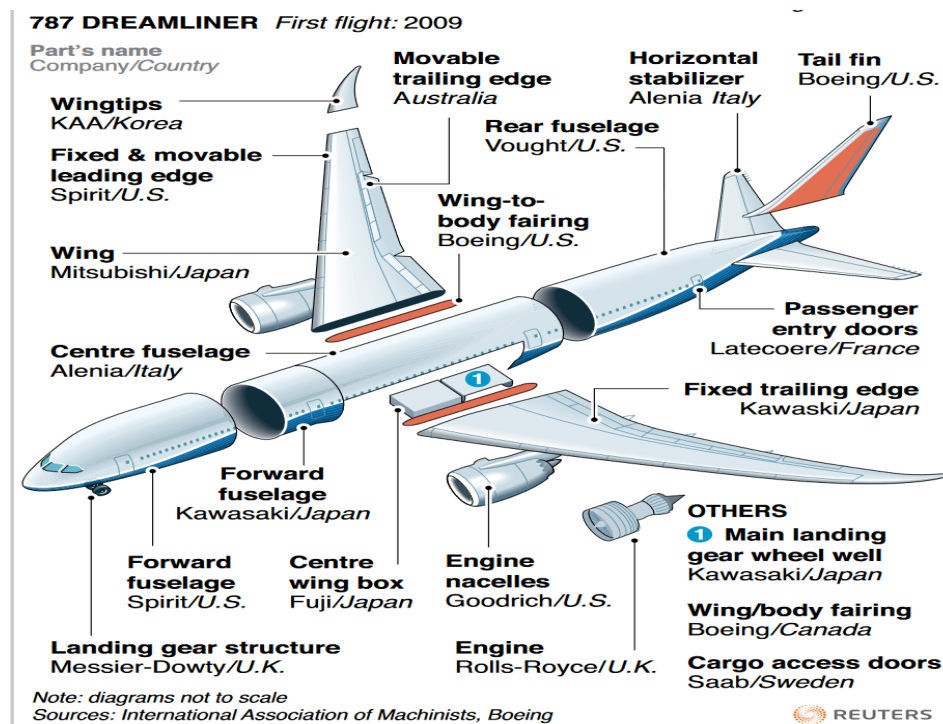
GVCs and International Relations

Most manufacturing and services industries are organized as GVCs, a term sometimes conflated with global production networks, cross-border production chains, supply chains, vertical specialization, disintegration or fragmentation of production, and globalized production. Typically measured by trade in “intermediate goods” or “trade-in-value-added,” GVCs are networks that spread the full range of tasks related to R&D, production, and marketing of products and services over several countries, from design to end use and beyond. Each stage or task contributes some “value-added” to the final product, leading to so-called “Made in the World” goods that can embed hundreds of inputs from dozens of countries, as in Figure 1’s example, the Boeing 787 Dreamliner. Typically, a country’s total GVC activity or participation rates include:

(a) The foreign value-added embedded in the country’s imported goods and services that go into

its exports (“backward participation”); and (b) The domestic value-added that the country incorporates into its exports to third parties, which in turn can become inputs into the latter’s own exports (“forward participation”).¹⁵ Most value-added is accrued by lead firms from industrialized countries via their non-production activities (R&D, marketing, distribution, etc.). Lead firms may be factory-less, outsourcing production via GVCs worldwide. The big growth spurt in GVCs (1988 to 2008) is associated with “hyperglobalization,” when GVCs accounted for nearly two-thirds of total (gross) trade.

Figure 1: Selected components of a Boeing 787 Dreamliner by firm and country (Source: <http://graphics.thomsonreuters.com/11/01/Boeing.pdf>)



My interest in GVCs began in 2013, as a logical extension of my long-standing research agenda on the relationship between political economy and security (Solingen 1998; 2007a,b;

¹⁵ GVC Development Reports 2017, 2019, 2021.

2015). At the time, I was researching an article on the outbreak of World War I (Solingen 2014). The first wave of globalization had ended with WWI; would the second meet the same fate a hundred years later? The article questioned unambiguous and proliferating comparisons between the political economy of pre-1914 Germany's Kaiserreich and pre-2014 China's, pointing to the distinctive features of the global economy across the two periods, with GVCs as a defining difference. Research on GVCs in the context of superpower competition and geopolitics was close to nil around 2013. Yet, having transformed global economic interdependence and connected countries in entirely new ways, I thought GVCs deserved more dedicated attention beyond international political economy. Work on interdependence and peace had typically surveyed bilateral trade in final goods and capital flows. Other work, connecting virtual states to declines in warfare among great powers (Rosecrance 1996, Brooks 2005), preceded the dramatic expansion of GVCs worldwide, their evolution toward complex GVCs, and the systematic conceptualization and measurement of GVCs (*GVC Development Reports* 2017, 2019, 2021)."¹⁶ Complex GVCs entail a high proportion of intangibles (R&D, patents, product design, branding, marketing, retailing) that might bind firms (and states) in ways that transcend classical forms of trade or financial interdependence.

Compounding Shocks to GVCs I: Geopolitics and COVID 19

There was no acute global crisis in 2013, but by 2018, trade and technology tensions between Xi Jinping's China and the Trump administration had flared up, leading to tariffs and calls for reshoring GVCs to counter China's forced technology transfers, subsidies to state-owned firms, failure to enforce intellectual property, and other transgressions of its WTO commitments.¹⁷ At this stage, reliable metrics on GVC reshoring and decoupling were elusive. A collaborative volume I had organized, providing intellectual justification for a focus on GVCs in international relations,

¹⁶ On networks, see Dorussen and Ward (2010) and Kinne (2012). Kim and Solingen (2016) probe empirically the role of intermediate goods in conflict and cooperation prior to the onset of major exogenous shocks discussed in this article.

¹⁷ On China's large-scale Made in China 2025 plan and other precursors, see Solingen (2021).

was due to the publisher in mid-2020 (Solingen 2021). A new meta shock — COVID-19 — forced the inclusion of a previously unplanned chapter on heightened uncertainty regarding GVCs due to border closures, labor restrictions in China, paralyzed transportation and supply shortages, and tensions over demands for greater transparency by China on the sources of COVID-19.¹⁸ Efficient “just in time” lean inventories and the dearth of substitutes had exposed the downside of global sourcing—access to ventilators, N95 masks, MRI machines, active pharmaceutical ingredients and other vital intermediate products from China—even though supplies were eventually restored.

The chapter’s preliminary conclusions highlighted the difficulty of adjudicating the respective effects of geopolitical and COVID-19 shocks on GVCs via plummeting worldwide demand for services and spiking demands for goods stemming from fiscal transfers. At the firm level, surveys suggested that reshoring to home states was hardly the standard GVC response and that “in China for China” strategies mitigated the impact of the trade and technology war. Yet more lead firms considered the decoupling scenario more plausible, accelerating offshoring to Southeast Asia and other third parties. Automation and digitalization became a pivotal strategy for building resilience, along with diversification of suppliers, reducing dependence on any single country for production or sourcing, increasing transparency and mapping of sub-suppliers, encouraging “just in case” rather than “just in time” operations, buttressing inventories and capacity buffers, regionalization, nearshoring and shortened GVCs. However, automation could resolve some logistical shortages but also reduce reliance on low-skill overseas labor, accelerating concentration and inequality everywhere. More localized and nationalized production was not necessarily equivalent to a more just distribution of costs and benefits. The twin shocks also threatened GVCs in food supplies, contributing to rising famine.

The volume went to press at an inflection point — mid-2020 – warning that such conjunctures are never good ground for extrapolating the future of GVCs. The ongoing restructuring of GVCs

¹⁸ Meta shocks are systemic and can unleash vicious cycles in GVC infrastructure (Solingen and Inomata 2021).

entailed a potential decline in China's status as factory of the world but hardly its complete demise. Diversification was taking the form of a "China-plus-1" or "China-plus-many strategies," with China's domestic market remaining a powerful source of attraction. COVID would accelerate the potential for decoupling, bolstering nationalist populism and exacerbating geopolitical tensions.

Compounding Shocks to GVCs II: Geopolitics, COVID-19, and Climate Change

A third challenge to GVCs, though not new, acquired crisis proportions when climate change delivered ever more extreme and recurrent weather patterns worldwide; GVCs both contributed to, and became more frequently affected by, them. Prior meta shocks — geopolitical, COVID-19 — deepened disagreements between the US and China over environmental policy. By early 2021, while all three shocks unfolded in real time, I began working on a framework comparing the respective sources, mechanisms, and effects of geopolitical, environmental, and pandemic challenges from -- and to — GVCs (Solingen et al 2021). The deeper sources of geopolitical shocks to GVCs were in inward-looking, nationalist-populist turns, especially in China and the US, aimed at substituting foreign sourcing and offshore production with domestic supplies; at retracting GVCs from adversarial or unreliable suppliers; and at reducing demand for foreign inputs. Some of these objectives were shared by constituencies otherwise supportive of international trade and offshoring, albeit with reliable and friendly suppliers.

However, more radical inward-oriented political-economy strategies called for more extreme versions of onshoring and GVC decoupling. Perceived asymmetries in the structure of GVCs make interdependence a source of uncertainty, risk, vulnerability, and friction. Zero-sum assumptions, prisoner's dilemmas, and relative gains dominate as externalities from GVC interdependence enable the conversion of economic gains into strategic advantages. Geopolitical shocks affect GVCs through mechanisms such as heightened uncertainty, reduced trust, escalatory retaliation, and contagion unto third parties. I relied on industry surveys that provided a window into the effects of geopolitical shocks on lead firms; the latter revealed rising hostilities toward foreign enterprises in China and growing incentives to diversify into third countries.

The sources of environmental shocks are well understood and backed by consensual scientific evidence. Such shocks affect GVCs through mechanisms such as global warming, extreme weather, pollution, deforestation, erosion of natural habitat, and rising seas, all of which exert massive destruction of human and physical capital, disrupt production, undermine GVC productivity, and fuel uncertainty. GVCs have contributed to climate change by increasing energy consumption and greenhouse gasses emissions in transportation and production and by shifting the burden of emissions and excessive waste (electronics, plastics, food) to countries with less stringent climate measures. The sources of pandemic shocks are partially rooted in heightened transnational connectivity and mobility resulting from easier, faster, cheaper, and more frequent cross-border travel supporting GVC operations and tourism. Mechanisms that enhanced the COVID-19 shock included retraction of GVCs via declines in labor force participation, lockdowns, quarantines, and border closures. Initial demand for services plummeted as demand for goods surged, leading to supply shortages. COVID-19 also deepened the uncertainty triggered by geopolitical tensions, further undermining investment.

That study, concluded in mid-2021, could only provide tentative findings and recommendations yet the synergies across the three meta shocks were clear and their effects kept compounding. GVCs amplified the impact of these shocks upstream and downstream (part of the problem) but also helped mitigate them (part of the solution). Countries with relatively higher reliance on GVCs were better able to adjust to shocks. Enhancing GVC resilience was not equivalent to pursuing extreme forms of self-reliance, an inefficient, costly, often ineffective, and counterproductive strategy. A revised but not obsolescing GVC infrastructure appeared to be emerging, more reliant on technology and diversification but not yet bifurcated into spheres of influence. Just as GVC networks seemed to be stabilizing, however, GVC snarls resurfaced along with surging prices throughout the supply chain contributing to inflation. The study emphasized that reducing risks *from* and *to* GVCs entailed greater sensitivity to domestic distributional considerations, raising the global minimum tax rate, tightening labor and environmental regulations, and global vaccination against COVID-19. It ended with a warning that heightened uncertainty about geopolitics could unleash more sizable disruptions in the global geography of production.

Compounding Shocks to GVCs III: Putin's war

That prescient warning notwithstanding, that study could hardly anticipate the geopolitical shock unleashed by Russia's military onslaught on Ukraine in February 2022. The war itself, along with massive sanctions on Russia, introduced unprecedented disruption, overlayed on pre-existing shocks and creating conditions for a "perfect storm" for GVCs not just within but also beyond the European theater. China's refusal to condemn Russia's invasion of a fellow UN member raised concerns with a potential military attack on Taiwan and other perceived risks stemming from China's abandonment of its charm offensive since 2013. The Ukraine crisis struck just as I began a project on GVCs in the context of the trilateral relationship among the EU, US, and China while in residence at the American Academy in Berlin. The policy of *Wandel durch Handel—change through trade*—had left Germany highly dependent on Russian energy supplies. Low-cost energy enabled Germany to become one of three major GVC hubs, along with China and North America. Russia's onslaught triggered a *Zeitenwende - turning point* – with potentially serious revisions in German and European GVC ties with China as well, and with industry associations recalibrating risks to, and from extensive reliance on China as "factory of the world." As of January 2023, it remains challenging to discern the outcome of this unfolding meta shock to the GVC landscape and its implications for international relations although this is precisely the focus of my current research (Solingen 2023). Putin's shock has already altered dramatically supply chains in energy, fertilizers, food, and critical raw materials, with severe implications for both industrialized and developing countries.

Conclusions

Crises engender heightened uncertainty among both policymakers and GVCs participants. Compounded crises make it all the more taxing for scholars seeking to understand their unique sources, mechanisms, and effects on GVCs. If consensual accounts of the past are hard to come, accurate predictions of the future are a chimera. Many agree, however, that the pre-existing GVC infrastructure was in flux even prior to 2022 although the direction of change and precise contours of the emerging GVC landscape remain elusive. WTO Director General Ngozi Okonjo-Iweala has

warned that GVC retrenchment could harm the integration of poorer countries from the developing world, depriving them of the gains accrued by East Asian countries (*GVC Development Reports* 2017, 2019, 2021).

As Cardenas (2022) points out “crises are no longer isolated tail-risk events that affect a few. They are much more frequent, multidimensional, and interdependent, and – because they transcend national borders – have the potential to affect everyone simultaneously.” Crises provide opportunities to observe “natural experiments” and “critical junctures” in real time. Research in international relations is bound to focus more and more on fast moving phenomena subject to crisis conditions, making findings far more contingent than might be the case for research on slower moving phenomena. Yet significant contemporary phenomena of interest -- democracy, populism, globalization, and much more — are fully in the category of moving targets due to the shocks described here. Conducting research under high uncertainty enables us to think countercyclically and to entertain a broad range of outcomes. This may include scenarios that circumvent complete GVC decoupling and recreate conditions for stability while improving sustainability, equity, compliance, and reciprocity, a tall order indeed. We cannot know the odds of that scenario today but the fact that GVCs still stand despite multiple and diverse shocks suggest a story of resilience that may part ways with globalization circa 1914. Stay tuned.

The Impact of COVID-19 on Scholars in the Global South

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The COVID-19 pandemic has had a dramatic global impact, but responses and consequences vary considerably across countries. This section considers some key differences for scholars across the Global South and North. The Global South may have seen a less direct economic impact of COVID-19, due to less restrictive lockdown policies, but poorer countries are likely to see a larger longer-run impact due to lack of supportive policies and resources. Although the immediate consequences for researchers and education were often similar, differences in resources and support have exacerbated inequalities between the Global South and North. The divide between richer and poorer countries seems to deepen, as their policies and resources cannot be matched (see Sánchez, 2021 and Davies in this forum).

The Global South includes a range of different low to upper-middle-income countries. Most suffered a severe economic impact from COVID. Lockdowns decreased GDP and undermined tourism, trade, and capital flows. This in turn had significant social impacts, including rising inequality, increased vulnerability, and rising poverty (Alcázar et al. 2021). However, there were large differences in impact across countries and regions, and the Global North did not clearly outperform the Global South. Africa recorded fewer direct health impacts in terms of cases and deaths. Asia initially appeared to perform well in containing spread, but struggles to contain outbreaks as of 2023. Latin America performed particularly poorly, with high transmission and deaths, and detrimental impacts on economy, health, and education (Alcázar et al. 2021). Latin America has higher income inequality than countries at similar levels of development, and COVID increased inequality further.¹⁹ In 2020, an additional 22 million are estimated to fall into poverty,

¹⁹ <https://www.undp.org/latin-america/publications/trapped-inequality-and-economic-growth-latin-america-and-caribbean>.

and socioeconomic vulnerability was associated with higher COVID infection and mortality (Drexler and Hoffmann 2021). The economic impact of COVID affected education (Krafft 2020). Women were more affected by social and economic hardships, with increased care responsibilities, and schools and nurseries shutting down.

COVID affected higher education in the Global North as well. One survey estimates a decline from 61 working hours per week pre-pandemic to 54 hours in 2020, and a reduction of 24% in time for research (Myers et al. 2020). Some researchers had to shift their work to topics related to the pandemic. But some reported having more time for research, and less equipment-intensive fields reported the lowest declines. The impact differed notably across resources and job security (Levine et al. 2021).

Moving to online activities had other negative consequences. Many scholars had to prepare extra courses on short notice. Lockdowns impacted home and family and made it difficult to dedicate time and effort to academic tasks. Many scholars lacked adequate space and resources to work from home, and often share personal computers with other family members and children taught remotely (Levine et al. 2021; Littlejohn et al. 2021). Scholars with better internet access were more likely to see technology as useful and more positive to working from home (AbuJarour et al. 2021). Many faced challenges such as lack of information and communications technology (ICT), increased workload, lack of time to develop online courses, anxiety and lack of motivation and confidence, as well as problems in assessing student learning. There was often a mismatch between online instruction and the curriculum, and insufficient attention to problems arising when moving instruction online without adapting traditional teaching practices. The challenges of managing time, space, and work-home relationships often undermined mental health and domestic relationships (Al Naabi and Al-Abri 2021; González and Bonal 2021; Littlejohn et al. 2021; Rule 2021).

Many higher education institutions demonstrated a digital disconnect gap between the availability and adoption of learning technology resources (Al Naabi and Al-Abri 2021; Guppy et al. 2022). Even higher education institutions with online education systems and institutional support still faced obstacles for teachers to incorporating such technologies, including time for learning, restrictions and security policies, and access to resources, software and hardware (Dorfsman and Horenczyk, 2022). The COVID pandemic also had a negative impact on the gender gap in academia. Surveys show substantial differences between men and women. Female scholars with dependents had less time for work and research, with respondents with at least one child 5 years old or younger reporting a 17% decline (Myers et al. 2020; Levine et al. 2021; Littlejohn et al. 2021). Finally, universities and higher education institutions offered less funding for research and professional development, and often cut support for professional memberships and attending conferences, even though virtual conferences also entail costs (Levine et al. 2021).

The transition to online learning has been uneven across universities and national contexts. Well-resourced institutions managed adequately, and often boosted capacity for remote learning, while universities with fewer resources struggled, some having to close down temporarily or permanently. COVID illustrate how crises can exacerbate inequalities in higher education, both within and between the Global North and South (Rule 2021).

There are many reasons to expect that a pandemic would hit the Global South harder, and in a sense it did. Academics faced many of the same problems as colleagues in the Global North, but more acute in some places than others, and with important differences in local context.

First, the digital and technological divide affected the possibilities for distance education. Different institutions use a range of learning management systems. Before the pandemic many private schools had developed virtual learning systems and trained teachers, while others were unable to provide students with basic functions. According to estimates from UNESCO (United Nations Education, Science, and Culture Organization), 55% of households overall have an internet

connection, but only 47% in developing countries and 19% in the least developed countries. Low internet access and low digital skills significantly limit learning possibilities (Alcázar et al. 2021). Electricity coverage also imposes constraints. Countries with limited technology access, such as Tanzania, Sierra Leone, and South Sudan, rely on radio and television for distance learning. Regions have different capacity to mobilize revenue, and the United Nations Economic Commission for Africa estimated a tax-to-GDP ratio of 13.4% for Africa in 2018, compared to 18% in Latin America.

Figures for the Arab region indicate that in early 2020, 91% of scholars were doing research, but 46% had to postpone research travel; 32% reported unavailable sites and materials; 31% experienced problems in collaborative work, whereas 14% experienced funding problems. Although some noted additional time for research, at least 60% reported decreased productivity, and many projects were canceled, delayed, or suffered in quality (Krafft 2020). Scholars often faced problems in making progress on research and publishing: 48% reported decreased publishing even if 25% reported increased publishing. The inability to publish hinders knowledge creation and careers. Those in countries with weak infrastructure struggle more. The Global South has relatively young scholars, and the pandemic will likely affect hiring, tenure, and promotion for a generation of early-career researchers. The disruption of works in progress means that data on current publications will underestimate the impact. On the brighter side, there have been more opportunities for research on COVID-19 and participating in conferences online (Jump 2021; Krafft 2020; Ramírez de la Cruz et al. 2020).

We also see clear differences between private and public institutions. Scholars in the former often experienced much less dramatic changes than in the latter. Private universities shifted courses online at a higher rate than public institutions (87% vs. 76%, see Krafft 2020). Online instructions allowed scholars to continue teaching, but the challenges seen in the Global North were scaled up, and many institutions were poorly prepared for this shift (Al Naabi and Al-Abri 2021; Didenko et al. 2021; Dunlop et al. 2020; Ramírez de la Cruz et al. 2020; Jump 2021; Maatuk et al. 2022; Rahman et al. 2021). Traditional teaching methods were often less effective in online learning, and

in many disciplines not all content could be taught online. These problems could make experienced teachers appear inexperienced in remote teaching (Didenko et al. 2021). The struggle with the pandemic and its impact on teaching was uneven for scholars. Female scholars with children were more negatively impacted by care responsibilities, just as in the Global North. In terms of average hours worked per week before and during COVID-19, men overall experienced a slight decrease. Among those with young children, 46%, experienced no change in childcare, and 29% became caregivers. Female scholars without children saw an increase in hours worked from 35 hours to 40 hours per week. Those with children became primary caregivers in their households, or saw work affected as arrangements for care were extremely vulnerable to disruption. Women with children aged zero to five, saw a fall in hours worked from 29 to 25 hours per week (Debata et al. 2020; Krafft 2020; Jump 2021; Ramírez de la Cruz et al. 2020).

All education systems were affected by the COVID-19 pandemic, and the huge disruption and impact was felt by scholars all over the world. Comparing the experiences across the Global North and South reveal similar challenges in higher education, with similar approaches adopted in teaching and supporting students in an online environment, and disruption to the resources available in all contexts. However, institutions and faculty with access to more resources had better opportunities to navigate the challenges, and we find profound differences within countries in the ability to cope with crises. Compared policies might highlight those inequalities, as noted by Graeme Davies in the following analysis. As noted by O'Dea and Stern (2022), the big winners emerging from the disruption were the global tech companies supplying most university systems. We still not do know if using the same resources will help smooth out local differences or further widen global inequalities. For international studies, Rule, Bitzer, and Frick (2021) note how these inequalities threaten to strengthen the dominance of Global North research, literature, and theories. Scholars in the Global South must generate knowledge, research, theory, and practice reflecting the imperatives and perspectives of their contexts. But this will only be possible for those with access to sufficient resources and working conditions. The pandemic has affected us all, and hopefully we have learned how to manage better for the next crisis. As a discipline, we have a lot of work to catch up with the legacies of COVID-19.

Social Science Infrastructure at a Time of Crisis: Lessons from COVID

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Significant public health challenges relating to vaccine hesitancy, resistance to mask wearing, and a broad suspicion of public health interventions drive a demand for social scientific analysis to feed into policy. Is this resistance driven by inconsistent messaging (which the Centre of Disease Control (CDC) has been blamed for) or a deeper skepticism of medical interventions?²⁰ Do messages need to be tailored to specific communities in different parts of the world? In the post-pandemic research environment International Relations scholars such as Davies and Wenham (2020: 1238) have highlighted the need for “[c]omparative analysis - because politics is not the same everywhere”. However, we lack capacity to conduct comparative analyses. Many studies of public health challenges are limited to the Global North, where high quality social scientific infrastructure was in place. We often have little to no idea about to what extent the findings from higher income countries apply to lower income countries or not, given the limitations in infrastructure and difficulties in conducting research during crisis such as the COVID pandemic. In this section I focus on how limits to data and research infrastructures undermine our capacity to understand individual attitudes and responses during the pandemic. This complements De Alba-Ulloa’s (2023) examination of how COVID impacted scholars in the Global South compared to the North. I highlight how better social science infrastructure in the Global South can help provide

²⁰ <https://www.scientificamerican.com/article/bad-covid-public-health-messaging-is-blocking-our-path-to-a-new-normal/> (accessed 5th January 2023).

an evidence base beyond higher income countries for our understanding of factors that shape responses to pandemics and improve our preparedness for future crises. This could of course also help research on other topics, but my discussion here focus primarily on the COVID pandemic.

Medical research tells us much about the nature of a virus, its reproduction number, and its severity, but is also clear that pandemics are not simply a medical problem but also a societal and political problem (Kluge et al. 2018). International relations and the literature on global health security tells us that political choices and behaviours in different countries are likely to have consequences on a global scale. New COVID variants - with the BA.5 Omicron variant dominating at time of writing – that are more transmissible and adept at evading vaccine immunity can have significant implications for healthcare systems around the world. New variants result from natural adaptation of the virus to new challenges, but can also be influenced policies and behaviours of governments and people globally (Lee et al. 2021). Developing a global social science infrastructure can allow us to understand better factors that influence behaviours beyond high income countries.

There has rightly been considerable discussion about vaccine equity and issues relating to the World Trade Organisation’s Trade-Related Aspects of Intellectual Property Rights agreement that constrained lower income countries from supporting local pharmaceutical production and increased costs on imported medicines and vaccines (‘t Hoen et al. 2011). We have less attention to how limited research infrastructures in the Global South constrain our understanding of individual behaviour that also influences pandemic dynamics.

Vaccine hesitancy is one area demanding behavioural and attitudinal research. Many studies in Europe and the United States have examined behavioural and attitudinal factors that drive vaccine hesitancy (Freeman et al. 2021; Luyten et al. 2019; Robertson et al. 2021). During the early stages of the UK vaccine rollout, the Office for National Statistics (ONS) were able to examine vaccine hesitancy between 7th of January and 18th of July 2021.²¹ Online studies were conducted “to estimate provisional willingness to receive a coronavirus 2019 (COVID-19) vaccine, identify predictive socio-demographic factors, and, principally, determine potential causes in order to guide information provision” (Freeman et al 2020). Cross-national studies of vaccine hesitancy in the US, UK and Australia were conducted with relative ease (Trent et al 2022). Other surveys cover Germany (Bendau et. al 2021), France (Schwarzinger 2021), Italy (Reno 2021) and so on. While studies have examined vaccine hesitancy in lower income nations such as Zimbabwe (Mundagowa 2022), they were far fewer, not rapid, did not collect data regularly over short intervals and often suffered from an inability to collect a roughly representative sample of the population. Where research on representative samples were collected, they tended to be in more developed African nations such as South Africa, using face-to-face data collection techniques (Cooper et. al 2021). As De Alba-Ulloa highlights, both scholars and the general population in the Global South developing often have limited internet access, and this constrains both online teaching and rapid

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<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/coronavirusandvaccinehesitancygreatbritain/previousReleases> (Accessed 29th June 2022).

data collection during a public health crisis. Where online samples are collected there is difficulty in achieving anything close to a representative sample, with significant limitations in reaching the poorest rural neighbourhoods. A combination of face-to-face and online might minimise this limitation but are slow and poorly designed to deal with a fast-paced crisis situation.

YouGov was able to collect data on attitudes towards vaccines quickly across a range of high income countries. Figure 1 presents attitudes towards vaccine willingness in 26 countries, none in Africa.²² Figure 2 presents public perceptions about confidence in the handling of the COVID pandemic, again for 26 countries but none in Africa²³. YouGov have also collected data about willingness to wear facemasks, change behaviour, stop sending children to school and even avoid eating raw meat, but never for an African countries.²⁴ This is not a criticism of YouGov, who provide valuable resources, but we see extreme differences in coverage across the range of countries by income.

²² <https://yougov.co.uk/topics/international/articles-reports/2021/01/12/covid-19-willingness-be-vaccinated> (accessed 30th June 2022).

²³ <https://yougov.co.uk/topics/international/articles-reports/2020/03/17/perception-government-handling-covid-19> (accessed 30th June 2022).

²⁴ <https://yougov.co.uk/topics/international/articles-reports/2020/03/17/personal-measures-taken-avoid-covid-19> (accessed 30th June 2022)

Figure 1: Willingness to Take Vaccines (YouGov).

YouGov COVID-19 vaccination willingness

% of people in each place who say they will take the vaccine, or have already done so

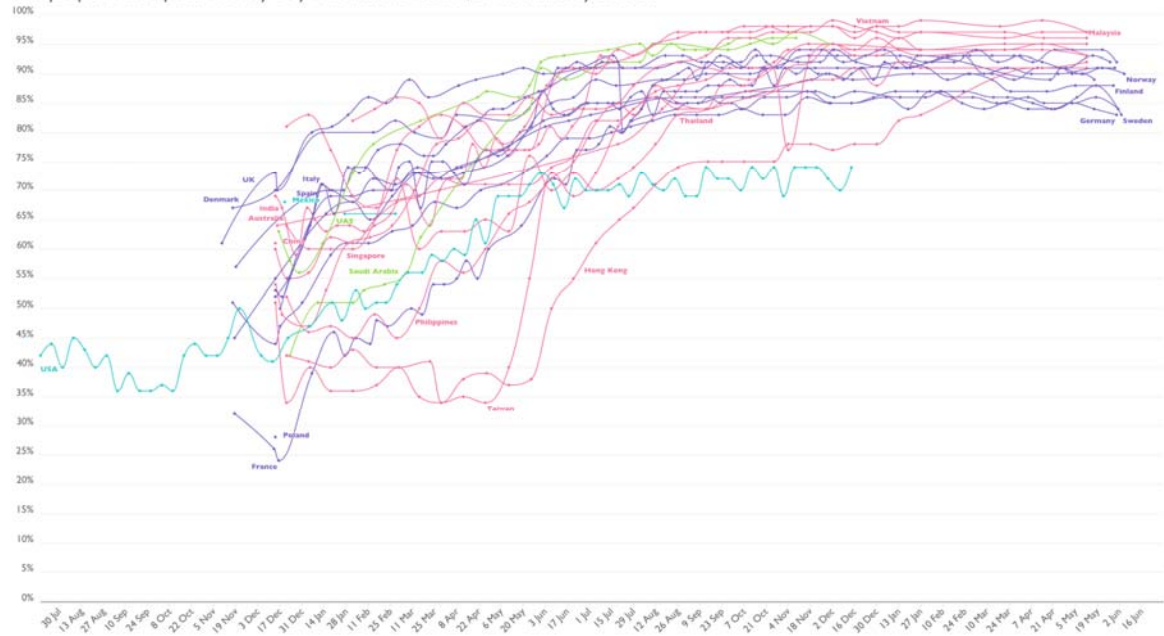
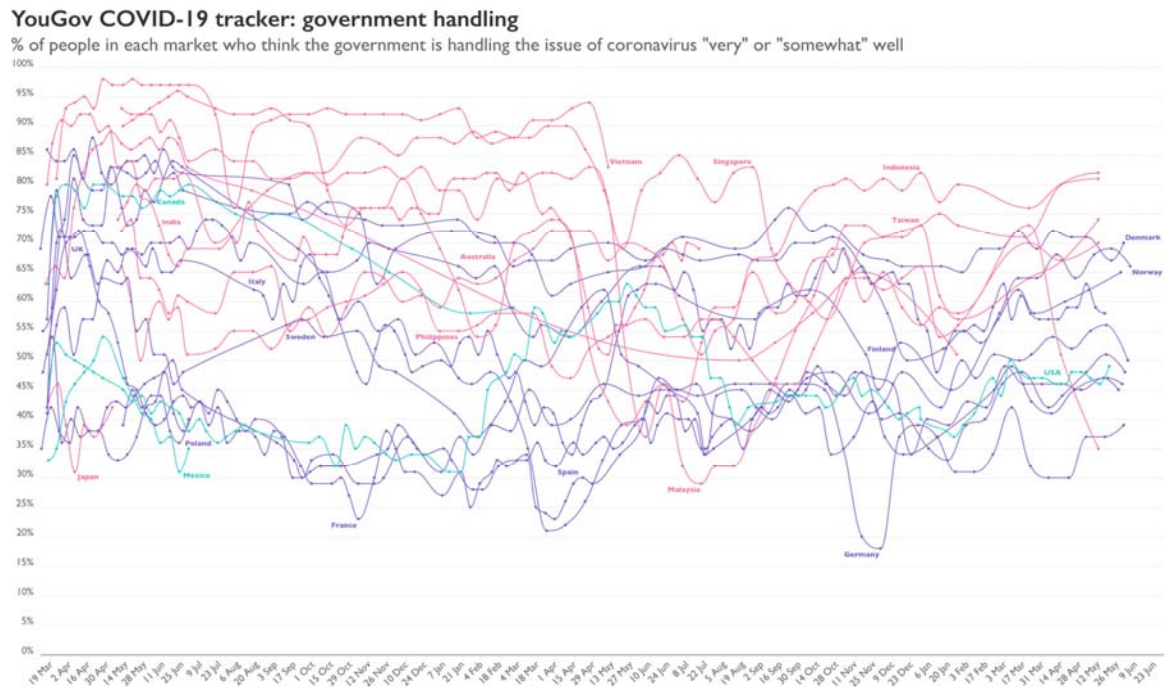


Figure 2: Government Handling (YouGov).



During the pandemic we developed a pretty good understanding of the measures used to mitigate the spread of the disease. The Blavatnik School of Government at Oxford University has collected excellent cross-national comparative data on measures in response to COVID.²⁵ We have reasonably good access to public health policy inputs, but we lack, particularly for the global south, an understanding of how interventions affect attitudes towards vaccines, wearing masks or going to crowded places, amongst others. That is a big problem. For example, in Hong Kong, we see significant differences in vaccine uptake amongst age cohorts, with older age groups tending to avoid vaccinations. This has huge implications for public health in Hong Kong, and also in China,

²⁵ <https://covidtracker.bsg.ox.ac.uk> (accessed 1 July 2022)

where the death rate amongst the elderly is much higher than elsewhere.²⁶ However, without detailed social scientific research we have little idea about what drivers this low uptake. Are the elderly more confident in the effectiveness of the zero-COVID policy and perhaps lulled into a false sense of security? Do the elderly perceive higher risk from vaccination or lack trust in the Chinese government? Different drivers of vaccine hesitancy entail different policy measures. Without the capacity to address these questions, public policy will flounder, with serious consequences for public health.

How can we evaluate the effectiveness of public health messaging in lower income nations without capacity to collect high quality data rapidly? In the UK for example, we were able to get at least weekly tracking data examining public support for quarantine measures, home working and cancelling of routine hospital operations amongst other options.²⁷ Policymakers and scholars will have a good sense of how public health messages are working by how the public respond to government interventions. There is a good evidence base for policy makers in the UK to understand how responses to their policies and change approach in response to the data. In the Global South we have no systematically and rapidly collected data, so policymakers lack a clear idea about how effective their messaging is at changing attitudes and behaviours. In the United States researchers were able to rapidly collect data on public health messaging. One study conducted an experiment on the MTurk platform just 10 days after President Trump declared a

²⁶ <https://twitter.com/jburnmurdoch/status/1503420660869214213> (accessed 1 August 2022)

²⁷ <https://yougov.co.uk/topics/international/articles-reports/2020/03/17/level-support-actions-governments-could-take> (accessed 1 July 2022)

national emergency, and could ascertain the effectiveness of key messages amongst different age groups (Utych and Fowler 2020). While MTurk is not perfect, the United States has the social science infrastructure that allows researchers to quickly investigate the effectiveness of inputs into the public health crisis response, in ways not readily available to in lower income countries. As we learnt throughout the pandemic crisis, behaviour matters, and so do speed, government policies and messages.

Research into public attitudes in developed countries was relatively unaffected by the global pandemic. Data collection using online platforms was easily done. Public opinion research is much harder in without online infrastructure. Other forms of research based around fieldwork such as the qualitative understandings of sub-national conflict processes or peacebuilding will have been hindered by both the closure of national borders and travel restrictions. This presumably will have knock on effects for research that relies on face-to-face contact. Are we going to see a downturn in publications about countries and regions that lack research infrastructure? During a major global health crisis we have found current challenges in conducting research across the range of high to low income countries states has significantly widened. The widening of these difficulties will result in further asymmetries in our understanding of societal processes in low-income countries.

There has been considerable discussion about health infrastructures and vaccine equity, but less attention to need for a global infrastructure assessing behaviour. As things stand, we have a relatively good understanding of the behaviours in developed nations with numerous surveys, experiments, monitoring of transportation flows and so forth. We know much less about the drivers

behind behaviours in the Global South. Drawing draw inferences from high-income nations about messaging and policies in lower income countries can be misleading and fraught with risk (Davies and Wenham 2020). Way before the current pandemic, the importance of cultural literacy for public health information had been recognised (Kreps and Kunimoto 1994). Public health communication needs to “frame health information to accommodate powerful cultural understandings of health information, science and individual and collective action” (Zarcadoolas et al 2005). Data collected in one country, with its own cultural context, are unlikely to generalise to other countries. In terms of risk, at best it has no impact on public understandings of health, and at worst it provides counter-productive messaging which undermines public health. If global health security is based around protecting everyone, everywhere then this gap in our knowledge is very dangerous. We need to develop global infrastructures for behavioural research, with national governments and international organisations building long-lasting infrastructure that allows social scientists to understand behaviours both during pandemics and at other times. How do we design interventions globally if we have very little idea about how those interventions are going to be received? It seems unlikely that we have a sufficient evidence base to influence future policy. Investments need to be considered in the use of satellite and mobile technologies that will aid responses to global problems. In an interconnected international system, it is imperative that we develop resources that allow us to conduct research in hard-to-reach environments.

Fieldwork During Lockdown and Crises: Challenges, Dilemmas, and Possible Ways Ahead

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IMF Managing Director Kristalina Georgieva has stated that we are “facing crisis upon crisis.”²⁸ We may be past the worst phase of the COVID pandemic, but it is far from over, and the long-term health and economic consequences are only starting to become clear.²⁹ Even before the 2022 Russian invasion of Ukraine, the world had been witnessing humanitarian crises from Afghanistan to Yemen, with human right abuses, war, displacement, and famine. According to UNHCR more than 89 million individuals have been forcibly displaced homes due to persecution, violence, and human right violations, including 21 million refugees at the end of 2021.³⁰ These numbers have more than doubled in ten years.

Unexpected events, such as the COVID-19 pandemic and the war in Ukraine, can upend years of groundwork for fieldwork, making going to the field difficult in practice and raise ethical challenges on respect for subjects and the difficulties they face. Crises are not going away. In this section I reflect on the potential challenges and dilemmas as well as possible ways to mitigate them, drawing on my own experiences.

When the World Health Organization declared COVID-19 a global pandemic on 11 March 2022, I had planned to go to Lebanon to continue fieldwork on forced displacement, focusing on former Lebanese internally displaced (IDPs) and Syrian refugees. The situation in Lebanon had already been dire before COVID-19, due to the economic crisis and protests in late 2019, and then on top

²⁸ <https://www.imf.org/en/News/Articles/2022/04/14/sp041422-curtain-raiser-sm2022>

²⁹ <https://abcnews.go.com/Health/american-adults-covid-long-haul-symptoms-data-shows/story?id=85569861>

³⁰ <https://www.unhcr.org/en-us/figures-at-a-glance.html>

of the pandemic the Beirut blast on 4 August 2020 caused 218 deaths, 7,000 injuries, 300,000 people homeless and \$15 billion in property damage.³¹

The pressures and distressing circumstances in Lebanon made me further conscious of the risks and duties to at-risk populations who become *more vulnerable* during such crises and challenges. Bond, Lake and Parkinson (2020) discuss how we need to be mindful that while crises, events, and pandemics tend to call for scientific research to inform possible solutions, we also need to ensure that we do not elevate researcher priorities over respondents' current needs. In fact, such situations should heighten our ethical responsibilities.

Individuals with children or responsibility for the well-being of family members were severely impacted by the pandemic, yet it is fair to say that scholars not relying on fieldwork or traveling for research were not impacted in the same way by the lockdown as those who do. For many, the questions that they ask necessitate travel and cannot be done from a distance. Moreover, there are potential opportunities for individuals, including those who are active participants in research.

In addition, the decline in tenure-track jobs and the rise in tenure expectations have led to a drive for unique data and veneration of "cutting-edge methodologies," all pushing for fieldwork becoming the new "hot" thing (Ghosn and Parkinson 2019). Even before the pandemic, scholars were pointing to some of the pitfalls of this trend, especially *Research Advocacy* (Jacobson and Landu) and *Research tourism/voyeurism*³² (Brand 2014; Ghosn and Parkinson 2019). This has led to researchers down a dangerous path of seeking to capitalize on research in high-risk areas for reputational and professional benefits; a process that Lake and Parkinson (2017) refer to as "outdangling." Moreover, there is an inclination to employ "smash-and-grab" fieldwork tactics,

³¹ <https://www.hrw.org/report/2021/08/03/they-killed-us-inside/investigation-august-4-beirut-blast>

whereby scholars rush into the field, run their experiment/survey/interviews, rush out and quickly write up their findings (Nielsen 2020).

In an ongoing project on vulnerability in human subject research, we code 361 documents on social and behavioral ethical standards from over 130 countries (Findley et al. 2022). We identify 68 separate vulnerability categories. Our work reveals how vulnerability is relational to changing contexts and research environments rather than a purely personal or group characteristic. All individuals and groups may be vulnerable under certain circumstances, even if some are more prone to vulnerability than others.

During the pandemic in general and the Lebanese case in particular for me, crises and events forced me to reconsider going into the field and whether it would be appropriate to do research that requires the participation of respondents in the Global South. I had to think about what type of *research-induced vulnerabilities* my research might create in this environment (Findley, et al. 2022). Respondents in Lebanon, and arguably other places in the Global South, faced economic uncertainties and inequalities exacerbated due to crises, and as a result I had to avoid posing unreasonable burdens on them with my research. As researchers, we need to always consider the mental and emotional state of respondents facing uncertainties brought on by such crises and events, even when at face value it may not seem that the group, we are talking to are vulnerable.

To give an example, a colleague who like me is an ex-pat from Lebanon working in the Global North had received a grant to research local level policies in addressing COVID. Part of the study was to interview Mayors to ask them a slew of questions about their policies as well as decision making. Despite the grant timeline being short, given the extraordinary circumstances, the agency was flexible and willing to extend the timeline for the project. This provided an opportunity to further reflect on the timing of the fieldwork. Mayors are elected officials and therefore, Institutional Review Boards (IRB) would see no problem with surveys through WhatsApp or zoom on populations not normally considered vulnerable. However, Mayors in Lebanon during that time had no financial help as the government collapsed after the Beirut bombing, had rising number of

people with COVID yet limited vaccines, there was no electricity and winter weather was making life very difficult for vulnerable populations in their district. So, while it would be great to get the perspective of the Mayors, given their time and resource constraints and the magnitude of social, economic and health issues that they had to deal with, what additional burdens would we be placing them under for our own research? Was it ethical to do so? Just as importantly, how many would even respond to the survey and be willing to spend time answering such question? Would we have good enough or a biased sample if we continued the same path?

As a research community, we need to recognize both inherent and situational vulnerabilities and take measures to reduce these and not add new vulnerabilities. The pandemic and crises forced me and others working in the Global South to think about the relationship between researcher and respondent, and what can be done to ensure that the social contract between researchers and participants is not violated. Essentially, “society grants the scientific community license to conduct research under certain conditions, which include the minimization of risk and maximization of benefit (individual and societal), appropriate consent, and a just distribution of benefits/risks” (Findley and Ghosn 2022). So, what can we do?

We can practice what Isabelle Stengers calls *slow science*, which encourages scholars to take the “opportunity to arouse a slightly different awareness of the problems and situations mobilizing us” (cited in Hussain 2020). The call for slow science has been echoed across the sciences, both STEM as well as social science. Some scholars have argued that the relentless competitive system that awards speed above all else has fostered a shift from a culture that promoted an “ethic of discovery” to one that rewards an “ethic of productivity” (Turner and Chubin 2020). A research system where fast science, not good science, wins the day (Sarewitz 2020). Baranski and Ollenburger (2020) demonstrate the downfalls of this in their evaluation of the Green Revolution. They maintain that while the Green Revolution has ushered several advances in the agricultural research scene, it has failed smallholder farmers, who are a critical part of the food system and the majority of farmers in the Global South. However, the research that gets funded tends to be large scale and in a controlled setting, both of which do not correspond to the reality/environment in

which smallholder farmers face. They maintain that what is needed is research that involves farmers on their land, which is typically slower than research using tightly controlled field trials.

When thinking about slow science in my work, that meant taking the time to work on the theory and to reconsider the research design. This was a great moment, as it forced me to stop and re-think some of the assumptions and questions that the discipline believed to have been put to rest. My colleague decided to utilize the flexibility in the grant deadline to focus their research by compiling data on local government policies and information of the mayors. This allowed a better understanding of the local situation and to ensure that when they are ready to field the survey they could limit the time needed with the respondents as more in-depth knowledge allowed for asking poignant questions. In both of our cases, we adopted Stengers (2018) advice on slow science, which ultimately encourages collective awareness and appreciation for society.

With borders shut down and travel bans enacted, many researchers have found ways to continue research by *remote fieldwork*. Luckily, the world responded with a quick move to online platforms, and people quickly adapted to WhatsApp and Zoom. This in turn allowed for researchers to record research interviews, for instance using Zoom, and then transcribing the audio through a software such as OTTER.AI and then using qualitative data analysis software, such as ATLAS.TI. Moving to online platforms entails challenges and is not suitable for every interview. However, it can help a researcher begin building networks before visits, build/add to their knowledge about their case/setting and to focus on non-sensitive/non-controversial issues and questions. This allows for a more focused engagement with more polished questions once they are able to get to the field.

As social scientists, akin to our colleagues in hard science, we are eager to conduct research that we hope can inform or impact policy, which we in turn hope can help achieve better outcomes. However, in our rush and enthusiasm, we sometimes neglect the burden we place on those we rely on for our data and information. We neglect our ethical responsibilities not only when we undermine the inherent and situational vulnerabilities of individuals, but when we create research-induced vulnerabilities.

Our research highlights how “a “vulnerability flag” is not some sort of stop-measure, immediately triggering a halt to the research” (see Findley et al. 2022). On the contrary, vulnerable populations are an important set of individuals with whom we should absolutely conduct research. Jacobsen and Landau (2003) caution researchers from falling into the “advocacy research” trap and suggest that one way to ensure that does not occur is to include the “missing control group” i.e., the vulnerable population who the study is intended to benefit. As a result, we need to conduct research with vulnerable populations, but to do so with much greater thoughtful openness.

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