

University of Szeged – Faculty of Law and  
Political Sciences  
Doctoral School

**Incumbent Advantage and Certain Aspects of  
Maintaining Political Position**

Doctoral (PhD) thesis

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# 1. Background of the doctoral thesis

## 1.1. Relevance of the research

Incumbents, i.e. political actors currently in office, are a fundamental phenomenon in the functioning of political systems, both democratic and, in a broader sense, non-democratic, and have a significant impact on the structure of political competition, the dynamics of voter decisions, and the reproduction of political power. Since the 1970s, international literature has shown that incumbent candidates usually enjoy a substantive advantage (incumbency advantage) over their challengers in re-election campaigns, which stems from the interaction of various institutional, communication and social mechanisms. Studies examining US congressional elections – most notably the research of Robert S. Erikson, David R. Mayhew and Alan I. Abramowitz<sup>1</sup> – established the theoretical framework and empirical testability of the concept of incumbency and widely demonstrated that re-election trends are driven not only by party political or ideological factors, but also by voter recognition advantages, institutional resources, the ability to shape the agenda, and the personal presence of politicians.<sup>2</sup>

Despite all this, the issue of incumbency is a relatively unexplored area in Hungarian political science. While the structure of the Hungarian political system, especially in local government politics, has a number of features that provide a favourable environment for the incumbent advantage to prevail, only sporadic studies have been conducted to systematically explore this mechanism. Studies analysing the re-election chances of mayors of county-level cities – primarily the research of Viktória Kozma and

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<sup>1</sup> Robert S. Erikson, "The Advantage of Incumbency in Congressional Elections," *Polity* 3, no. 3 (1971): 395–405; David R. Mayhew, "Congressional Elections: The Case of the Vanishing Marginals," *Polity* 6, no. 3 (1974): 295–317, <https://doi.org/10.2307/3233931>; Alan I. Abramowitz, "Incumbency, Campaign Spending, and the Decline of Competition in U.S. House Elections," *The Journal of Politics* 53, no. 1 (1991): 34–56, <https://doi.org/10.2307/2131719>.

<sup>2</sup> Stephen Ansolabehere and James M. Snyder, "The Incumbency Advantage in U.S. Elections: An Analysis of State and Federal Offices, 1942–2000," *Election Law Journal: Rules, Politics, and Policy* 1, no. 3 (2002): 315–38, <https://doi.org/10.1089/153312902760137578>.

Ferenc Kumin<sup>3</sup> – have indicated the existence of this phenomenon, but several important dimensions of the Hungarian incumbency structure remain unexplored. Domestic research has rarely approached the issue from the perspective of communication or behavioural science, and has not examined how incumbency fits into the struggle for political attention in the digital media space. In addition, Zsófia Papp's study also points to the disadvantages of incumbency in terms of individual constituency systems and local ties.<sup>4</sup>

The topic is even more relevant now that the global COVID–19 pandemic in the early 2020s has shed new light on political leaders' visibility, crisis management skills, and communication performance. The "rally around the flag" effect that often occurs in crisis situations can temporarily strengthen the position of incumbent political actors, but it is unclear under what political and communication conditions this effect occurs. Political communication during a crisis, especially in the digital space, plays a key role in the legitimacy of leaders and influences voters' perceptions, assessments of political competence, and the development of social trust.<sup>5</sup>

This dissertation starts from the recognition that understanding the phenomenon of incumbency cannot be limited to a single political level or methodological perspective. The incumbent advantage is not exclusively an electoral phenomenon, but appears at the intersection of political communication, social perception, perceptions of government performance, and the logic of political attention. The dissertation therefore undertakes to empirically examine the various manifestations of incumbency in three different political and social contexts: the Prime Minister's Facebook communication, mayoral elections in Hungarian county-level cities, and primary elections in Central and South-Eastern European

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<sup>3</sup> Kozma Viktória és Kumin Ferenc, „Inkumbensek a magyar polgármesterek választási küzdelmeiben”, in *Új képlet. Választások Magyarországon*, szerk. Zsolt Enyedi és mtsai. (Demokrácia Kutatások Magyar Központja Alapítvány, 2010).

<sup>4</sup> Papp Zsófia, „Inkumbens-hátrány (Helyi kötődés és a személynek szóló szavazat Magyarországon)”, *Politikatudományi Szemle XXV*, sz. 2 (2016): 33.

<sup>5</sup> John E. Mueller, “Presidential Popularity from Truman to Johnson,” *The American Political Science Review* 64, no. 1 (1970): 18–34.

countries during the pandemic. The selected case studies allow us to analyse the phenomenon in terms of its communicative, institutional, political and crisis dimensions, and to understand the functioning of the positional advantage in a complex way.

The relevance of the research is also supported by the scientific and practical need to understand that the quality of democratic competition can only be assessed if we know the structural and communication factors that influence, distort or stabilise electoral processes. The study of incumbency is one of the touchstones of this democratic functioning: it shows under what conditions the advantage of those in office can be considered legitimate and when it becomes problematic from the point of view of political equality.

## 1.2. Research objectives and research questions

The aim of the dissertation is to examine the political and communicative phenomenon of incumbency on multiple levels using an interdisciplinary approach and to explore the factors that determine the chances of incumbent politicians retaining their positions in different social and institutional environments. The research is exploratory in nature and follows inductive logic; it does not seek to prove predefined hypotheses but rather draws conclusions about the mechanisms of incumbents based on empirical cases. The aim is not to create a universal model of incumbents, but to show how the phenomenon manifests itself and how it changes in different political contexts.

The primary objective of the research is to reveal that the advantage of incumbent political actors does not stem from a single factor, but is shaped by the interplay of institutional, communicative, social and behavioural dimensions. One of the aims of the dissertation is therefore to place the concept of incumbency in a broader interpretative framework that goes beyond the logic of electoral systems. It takes into account the possibilities of political agenda setting, the dynamics of the attention economy, the structural role of

social media, the importance of local political embeddedness, and the mechanisms of legitimation that operate during crises.

Another objective of the research is to analyse comparable case studies representing different levels of political competition. The dissertation examines how incumbency manifests itself in digital communication during a crisis at the level of prime ministerial communication; it analyses re-election rates and the effects of party affiliation in local politics; and the regional comparison shows how extraordinary political and institutional circumstances influence the electoral performance of incumbent actors.

The research questions of the dissertation are as follows:

*Q1: What factors can influence the chances of incumbent political actors retaining their positions and their behaviour in different political and social contexts?*

*Q2: What themes and narratives structured Viktor Orbán's Facebook communication as an incumbent political leader during the first wave of the COVID-19 pandemic?*

*Q3.1: To what extent does the incumbent advantage prevail in mayoral elections in Hungarian county-level cities between 1998 and 2019?*

*Q3.2: What impact did party affiliation and the election year have on mayoral elections in Hungarian county-level cities between 1998 and 2019?*

*Q4: How did the COVID-19 pandemic – including the use of extraordinary electoral procedures – affect the electoral chances of incumbent political actors in primary elections in the five Central and South-Eastern European countries examined between March and October 2020?*

These research questions allow for the examination of the phenomenon of incumbency on multiple levels and using multiple methodological approaches. The thesis uses both qualitative and quantitative analysis tools in order to provide a nuanced, context-sensitive picture of the functioning, advantages and limitations of political incumbency. The structure of the questions also outlines the

conceptual and analytical framework along which the empirical chapters of the dissertation are organised and provides a basis for drawing theoretical and practical conclusions about the asymmetries of political competition.

### 1.3. Methodologies used in the dissertation

The methodological approach of the research is deliberately pluralistic, which follows from its exploratory, inductive research logic. The dissertation does not attempt to test a predetermined hypothesis, but rather to identify, based on specific empirical cases, the mechanisms that give the incumbent an advantage in different political and social contexts. In line with this, the research uses both qualitative and quantitative methods and creates a comparative perspective that allows for the exploration of the multidimensional nature of incumbency.

The dissertation is based on three complementary case studies representing different political levels and institutional environments. The analysis of the Prime Minister's Facebook activity relies on qualitative content analysis methodology, which uses thematic analysis to identify recurring motifs, emotional structures and communication patterns in the posts. The posts collected from the Prime Minister's official Facebook page were coded after several rounds of reading, and the aim was to explore how the incumbent leader's role was constructed in the digital space during the first wave of the crisis. The advantage of this method is that it can flexibly handle large amounts of qualitative data and allows for the interpretation of communication contexts, narrative structures and implicit leadership representations.

The second case study uses a quantitative, descriptive statistical approach to examine the re-election rates of mayors of county-level cities between 1998 and 2019. The research is based on the analysis of simple rates and temporal trends, which is suitable for demonstrating the structural nature of incumbency and the long-term

dynamics of position retention.<sup>6</sup> The election data comes from the official database of the National Election Office and contains the results of municipal elections following full cycles. The study deliberately avoids the use of indicators often used in international election research, such as the sophomore surge or the retirement slump, as these cannot be calculated consistently due to the specific characteristics of the Hungarian electoral system. The research thus focuses on raw re-election rates and their development over time, paying particular attention to the impact of party affiliation and the national political climate.

The third case study is a qualitative comparative analysis examining elections held during the pandemic in five Central and South-Eastern European countries: Serbia, Croatia, North Macedonia, Montenegro and Poland. The methodological approach relies on secondary sources, primarily reports from OSCE election observation missions, academic publications and political analyses. This approach allows for a country-by-country comparison of legal and institutional adaptations related to electoral procedures, the specificities of the campaign environment, and the evolution of support for incumbent candidates. The advantage of the qualitative comparative method is that it is sensitive to differences in political systems and reveals how extraordinary circumstances have influenced the success of incumbents.

The methodological combination of the three case studies is not merely a technical solution, but a decision that determines the fundamental logic of the research. The use of different methods allows us to interpret the phenomenon of incumbency not from a single perspective, but in several complementary dimensions. The dissertation thus simultaneously connects to the classical election research traditions of political science, the analysis of political communication, and behavioural science explanations. The aim of

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<sup>6</sup> The methodological inspiration came from the research of Viktória Kozma and Ferenc Kumin covering the period between 2002 and 2010: Kozma és Kumin, „Inkumbensek a magyar polgármesterek választási küzdelmeiben”.

methodological pluralism is to describe the functioning of the incumbent advantage in a nuanced way and to provide context-dependent explanations that are compatible with both domestic and international research.

#### 1.4. Data collection

The research data was collected from multiple sources and using different data collection methods, in line with the interdisciplinary approach of the thesis. The data necessary for the analysis of the Prime Minister's Facebook communication was collected independently and includes all posts published on the Prime Minister's official Facebook page between 1 March and 31 August 2020. During the collection process, the textual and visual elements of the posts were recorded, as well as the date of publication, which also made it possible to examine the development of content patterns over time. The data was processed manually in several steps, which ensured the reliable and consistent formation of thematic categories.

The re-election data for mayors of county-level cities comes from the official, public database of the National Election Office, which contains the results of local municipal elections broken down by municipality. During the collection process, only those elections that took place after the end of a full cycle were included in the study, so interim elections, which are not structurally comparable, were not included in the study. When identifying the political status of municipalities, special attention was paid to local candidates who ran as independents or with mixed support, so the research used proximity to the government as a distinguishing category instead of party affiliation.

The data required for the regional comparative study were based primarily on secondary, reliable and detailed sources. In addition to the reports of the OSCE election observation missions, academic articles, country reports, election reports and political analyses were also used, which describe in detail the changes in electoral procedures, campaign conditions and the political

environment. The countries were selected because they all held national elections during the first wave of 2020, which took place under pandemic conditions, thus providing a comparable framework for examining the incumbent advantage in extraordinary situations.

The diversity of data sources used in the collection of material was not only a methodological necessity but also justified by the subject of the research. The various manifestations of incumbency can only be revealed if the analysis is able to simultaneously address digital communication, election results and the functioning of political institutions. The combined interpretation of different types of data ensured that the dissertation provided a complex and nuanced picture of how the incumbent advantage works in the Hungarian and regional political arena.

### 1.5. Structure of the dissertation

The structure of the dissertation follows the logic of the research questions and uses a structural framework that allows for a context-dependent and multidimensional analysis of the phenomenon of incumbency. The first chapter of the dissertation presents the relevance, objectives, theoretical foundations and methodological framework of the research, delineating the field of interpretation in which the concept of incumbency can be examined. The second, third and fourth chapters discuss the theoretical background, with particular emphasis on the conceptual definition of incumbency, the structural factors at play in electoral systems, and the communication approaches that nuance the political nature of the phenomenon. The aim of the theoretical chapters is not only to present the literature, but also to identify the conceptual and analytical axes along which empirical studies can be interpreted.

The fifth chapter examines the communication dimensions of incumbency, particularly in crisis situations, through an analysis of the Prime Minister's Facebook communications. The chapter is based on a thematic analysis of posts published during the first wave of the COVID-19 pandemic and examines how leadership and legitimacy

narratives are constructed in the digital space. The sixth chapter analyses the functioning of incumbency at the local political level and demonstrates the durability and structural nature of the advantages of the position through the re-election rates of mayors of county-level cities. The chapter pays particular attention to how party affiliation, the national political climate and the dynamics of the election year influence the chances of re-election.

The seventh chapter provides a comparative analysis of elections held during the pandemic and shows how the effects of incumbency change in an extraordinary political environment. Procedural changes related to the conduct of elections, changes in turnout rates, and inequalities in campaign conditions are context-dependent factors that shed new light on the advantage of incumbents. The eighth chapter contains an interpretation of the results of the dissertation, a summary of the theoretical lessons learned, and a description of the limitations of the research, as well as an outline of further research directions. The concluding chapter summarises the thesis's contribution to the understanding of political science and communication theory, with particular attention to the implications for democratic competition.

The structure of the dissertation is thus based on a gradually deepening analytical arc that leads from the delineation of the theoretical framework through empirical investigations to normative conclusions, allowing for a multi-faceted interpretation of the phenomenon of incumbency.

## 2. New scientific results and their potential applications

### 2.1. Incumbency as a context-dependent, multidimensional phenomenon (Q1)

The first research question of the dissertation examined the factors that shape the chances of incumbent political actors retaining their positions in different social, institutional and political environments. The theoretical review revealed that the concept of incumbency is a long-standing and well-documented category in political science research, which developed in the stable institutional system of the United States and became empirically testable through the analysis of congressional elections.<sup>7</sup> Classical research has clearly demonstrated that incumbents are significantly more likely to be re-elected than their challengers, and there are many explanatory factors for this, ranging from election financing to agenda-setting ability and personal name recognition to constituency activity.<sup>8</sup>

The theoretical chapter also pointed out that incumbency cannot be reduced to an institutional phenomenon, because its functioning is also shaped by communication<sup>9</sup>, social and behavioural science logics. The structure of electoral systems,<sup>10</sup> the method of voter access and the significance of personal votes all determine the extent to which the advantage of incumbency prevails.<sup>11</sup> Majority systems, where voters vote directly for individuals, offer particularly favourable conditions for the development of incumbency, while in proportional systems, the role of parties and list logic can modify or weaken this effect. At the same time, the dissertation shows that some proportional systems, such as the *STV model* (single transferable

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<sup>7</sup> Erikson, "The Advantage of Incumbency in Congressional Elections"

<sup>8</sup> Mayhew, "Congressional Elections: The Case of the Vanishing Marginals"; Alan I. Abramowitz, "Incumbency, Campaign Spending, and the Decline of Competition in U.S. House Elections"

<sup>9</sup> Merkovity Norbert, A figyelemalapú politika a közösségi média korában: a politikai kommunikáció lehetséges értelmezése napjainkban, (Médiatudományi könyvtár; 32), sz. (Médiatudományi könyvtár; 32) (Nemzeti Média- és Hírközlési Hatóság Médiatanács Médiatudományi Intézete, 2018), <http://nmhh.hu/dokumentum/196007/MK32web.pdf>

<sup>10</sup> Fábán György és Kovács László Imre, *Voksok és mandátumok: a választási rendszer arányossága* (Villányi úti könyvek., 1998).

<sup>11</sup> See Kozma és Kumin, „Inkumbensek a magyar polgármesterek választási küzdelmeiben”.

vote),<sup>12</sup> are also capable of reproducing the incumbent advantage, albeit through other mechanisms, such as intra-party primaries<sup>13</sup> or preferential voting.<sup>14</sup> All this suggests that incumbency does not arise from itself, but from the decision-making logic of the electoral system and the personal nature of the relationship with voters<sup>15</sup>

The paper adds new perspectives to this theoretical background in several respects. On the one hand, it shows that the advantage of incumbency is not universal, but only becomes an actual electoral advantage when certain institutional, political and social configurations coincide. On the other hand, the analysis also points out that the specific political environment of the Central and South-Eastern European region (e.g. unstable party structures, cyclical political crises, shifting voter loyalty) creates conditions under which classic American incumbency patterns can only be interpreted to a limited extent. Thirdly, the dissertation shows that the advantage derived from position can also be reinforced by psychological and social factors (e.g. uncertainty avoidance, the need for stability or trust in leadership competence), especially in times of crisis. The research thus complements the political science application of the concept with behavioural science perspectives that highlight the anthropological and evolutionary roots of leader loyalty.<sup>16</sup>

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<sup>12</sup> Paul Redmond and John Regan, “Incumbent advantage in a proportional electoral system: A regression discontinuity analysis of Irish elections”, *European Journal of Political Economy* 38 (June 2015): 244–56, <https://doi.org/10.1016/j.ejpoleco.2015.03.002>. ; Serhat Hasancebi, “The Maltese single transferable vote experience: a case study of gerrymandering?”, *Constitutional Political Economy* 34 (February 2023), <https://doi.org/10.1007/s10602-023-09395-z>.

<sup>13</sup> Although intra-party primaries demonstrate the specific advantages of the position, due to the complexity of the topic and the scope of the dissertation, it was only mentioned briefly in the dissertation.

<sup>14</sup> Jens Olav Dahlgard, “You just made it: Individual incumbency advantage under Proportional Representation,” *Electoral Studies* 44 (december. 2016): 319–28, <https://doi.org/10.1016/j.electstud.2016.09.004>; Kaisa Kotakorpi et al., “Returns to Office in National and Local Politics: A Bootstrap Method and Evidence from Finland,” *The Journal of Law, Economics, and Organisation* 33, no. 3 (2017): 413–42, <https://doi.org/10.1093/jleo/ewx010>; Jon H. Fiva and Helene Lie Røhr, “Climbing the ranks: incumbency effects in party-list systems”, *European Economic Review* 101 (January 2018): 142–56, <https://doi.org/10.1016/j.euroecorev.2017.09.011>.

<sup>15</sup> Richard Herrera and Michael Yawn, “The Emergence of the Personal Vote,” *The Journal of Politics* 61, no. 1 (1999): 136–50, <https://doi.org/10.2307/2647778>.

<sup>16</sup> Michael Price and Mark Vugt, “The evolution of leader–follower reciprocity: the theory of service-for-prestige,” *Frontiers in Human Neuroscience* 8 (June 2014): 363, <https://doi.org/10.3389/fnhum.2014.00363>.

The answer to the first research question of the thesis is therefore that incumbency cannot be considered an automatic or deterministic political advantage, but rather a multidimensional construct based on institutional structures, communication practices, social perceptions and psychological mechanisms. Based on Hungarian and regional examples, it becomes clear that the advantage of incumbency only becomes significant when the political system, electoral institutions, party structure and voter confidence all create a favourable environment for it.<sup>17</sup>

*T1. The incumbent advantage only becomes an actual electoral advantage in certain institutional and social configurations.*

*T2. The American patterns of incumbency observed in a classic, stable institutional environment can only be applied to a limited extent in Central and South-Eastern Europe.*

*T3. The functioning of incumbency is determined not only by institutional factors, but also by communication and psychological factors, which are amplified in crisis situations.*

## 2.2. Incumbency in the attention economy: the Prime Minister's Facebook communication (Q2)

The second research question examined the Prime Minister's Facebook communication during the first wave of COVID-19 and analysed the themes and narratives through which the incumbent's advantage appears in the digital space. The analysis identified four thematic clusters that organise the communication logic of the crisis situation: mood building, the international dimension, leadership and rule-making. The structure of the posts showed that the communication did not merely seek to convey information but also constructed a leadership narrative that portrayed the prime minister as a caring, capable, competent figure who had the crisis under control.

The theme of mood-setting was aimed at creating emotional stability, often with the help of everyday scenes and personal

messages. The international dimension emphasised the head of government's role in foreign policy, reinforcing the message that the crisis was not only a domestic challenge but also a European and global one, in which Hungary was an active player. The themes of governance and rule-making represented continuity in decision-making and the government's ability to act, while the visual and textual elements in the posts reinforced the image of leadership competence.

The interconnection of thematic clusters created a coherent narrative that made the prime minister the primary medium for crisis management. The posts not only presented the government's measures, but also performatively created a political worldview in which the leader's direct presence and continuous communication were the guarantee of community stability. This process fits in with the logic of the attention economy, in which political actors compete to maintain and shape public attention.<sup>18</sup> In a crisis situation, digital presence becomes particularly important because, in times of social uncertainty and lack of information, direct, personal communication becomes a key mechanism of legitimisation.

The structure and timing of the posts are also linked to the "rally around the flag" theory, according to which in a crisis situation, society tends to strengthen its trust in the leader in office.<sup>19</sup> The communication strategy reinforced the political logic of this effect: the prime minister appeared as a visible and accessible figure at the centre of the crisis, which may have increased political support and stabilised the government's legitimacy.

The results of the research show that the digital space is not just a supplementary communication channel, but a structural element capable of reorganising the communication dimension of the incumbent's advantage. Facebook as a platform provides an opportunity to strengthen emotional ties, present immediate leadership

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<sup>18</sup> Merkóvity, *A figyelemalapú politika a közösségi média korában: a politikai kommunikáció lehetséges értelmezése napjainkban*; Török Gábor, *A politikai napirend: politika, média, közvélemény és az „agenda-setting” hatás*, 1. magyar nyelvű kiad (Akadémiai Kiadó, 2005).

<sup>19</sup> The structure and content of the posts fit well within the theoretical framework of rally around the flag: Mueller, "Presidential Popularity from Truman to Johnson".

responses, and maintain a consistent political narrative, which becomes a particularly powerful tool for legitimacy in a crisis situation.

*T4. In a crisis situation, the Prime Minister's Facebook communication makes the head of government the primary medium for crisis management, thus becoming one of the most important sources of communication for the incumbent.*

*T5. Digital presence not only complements but also structurally shapes the communication dimension of the incumbent, as the leader's constant visibility is one of the key mechanisms of legitimacy.*

*T6. During a crisis, the prime minister's communication creates a narrative that builds on the image of an active and caring leader, thereby creating the communication conditions for the rally around the flag effect.*

### 2.3. Incumbency in local politics: re-election of mayors (Q3.1–Q3.2)

The third set of research questions examined the re-election chances of mayors of county-level cities between 1998 and 2019. The quantitative data clearly show that incumbency is one of the most stable structural factors in the local political field. Re-election rates are consistently high, with the vast majority of incumbent mayors successfully retaining their positions, and in several election years – particularly in 2010 and 2014 – re-election rates exceeded 90 per cent. Even in 2006, the year with the lowest re-election rate, the rate still reached 50 per cent, which, considering the turbulence of the political environment in that election year, still indicates a significant incumbent advantage.

The research showed that local political embeddedness, name recognition and personal presence play a key role in the success of incumbents.<sup>20</sup> Mayors are key players in the public life of their municipalities, who are in direct contact with the local population, and

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<sup>20</sup> Kristóf Luca, „Az elitek szerepe a társadalmi integrációban”, in *Integráció, egyenlőtlenség, polgárosodás: A magyar társadalom a 2020-as évek elején 2. kötet*, szerk. Imre Kovách (HUN-REN Társadalomtudományi Kutatóközpont, 2024).

their daily presence is an important source of political stability. This correlation is reinforced by the logic of personal voting, according to which voters do not base their decisions solely on party identity, but also take into account the personal character, credibility and past performance of the candidates.<sup>21</sup>

The analysis also revealed that party affiliation and the national political climate strongly influence the re-election chances of incumbent mayors. The results from 2002 and 2010 confirm the presence of the honeymoon effect, whereby the national support for a newly elected ruling party can also strengthen the local politicians associated with it.<sup>22</sup> In contrast, the 2006 election results clearly showed that during a national political crisis, ruling party incumbents can be at a disadvantage. The 2019 election highlighted that the separation of municipal and parliamentary election cycles interrupts the previously observed co-movement and enforces an inter-cycle logic (midterm), in which the ruling party generally performs less well.<sup>23</sup>

Local incumbency is therefore based on a dual logic. On the one hand, it is a structural advantage based on personal recognition, local embeddedness and continuous presence. On the other hand, it is a politically context-dependent phenomenon that is also strongly influenced by the national political mood and cyclical changes in the performance of the ruling party.

*T7. In county-level cities, incumbency is structural in nature and one of the most important organising principles of the local political field, which is reflected in consistently high re-election rates.*

*T8. Party affiliation only strengthens the advantage of incumbent mayors if they are backed by a favourable political environment at the national level; in crisis situations, it can become a distinct disadvantage.*

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<sup>21</sup> Papp Zsófia, „Inkubens-hátrány, helyi kötődés és a személynek szóló szavazat Magyarországon”

<sup>22</sup> Karlheinz Reif and Hermann Schmitt, “Nine Second Order National Elections: A Conceptual Framework for the Analysis of European Election Results”, *European Journal of Political Research* 8 (1980): 3–44.

<sup>23</sup> Edward R. Tufte, “Determinants of the Outcomes of Midterm Congressional Elections”, *The American Political Science Review*, 1975, 812–26.

*T9. Local political embeddedness and personal name recognition are stabilising forces that can maintain the incumbent's advantage even in times of intense party political turbulence.*

#### 2.4. Incumbency in a crisis situation: national elections during a pandemic (K4)

The fourth research question examined how the first wave of the COVID–19 pandemic affected the electoral chances of incumbent political actors in the five countries studied – Croatia, Serbia, North Macedonia, Montenegro and Poland – with regard to the application of extraordinary procedures, voter turnout and the structure of political competition. The results of the dissertation show that in many cases the crisis had a favourable effect on incumbent politicians, but the impact was not uniform and depended significantly on the type of political system, the strength of the opposition and the asymmetries in campaign conditions.

The Croatian parliamentary elections in the summer of 2020 illustrate well the strengthening of incumbents resulting from the crisis. The ruling HDZ identified itself with successful crisis management in the first phase of the pandemic, and the vote was held before the second wave intensified, which ensured favourable timing for the party. The case of Serbia is even more striking. The boycott by opposition parties, the severe distortion of media relations and the drastic decline in turnout created a political environment in which the SNS's landslide victory was due more to the lack of opposition competition than to a shift in voter preferences. Although the elections in Montenegro and North Macedonia showed a less clear pattern, the decline in turnout and the limited campaign conditions also noticeably weakened the opposition's mobilisation capacity.

The Polish presidential election is instructive because procedural uncertainty – the legal dispute over postal voting, the cancellation of the first election date and the forced extension of the campaign period – created legal uncertainty that was easier for the incumbent president to manage, communicate and legitimise.

Although Andrzej Duda was not able to increase his party's support in all respects, the final result of the election suggests that the extraordinary circumstances still had an incumbent-strengthening effect.

A comparison of elections held during the pandemic allows for several broader conclusions to be drawn. On the one hand, the "rally around the flag" effect – the social reflex that manifests itself in rallying behind the incumbent leader in a crisis situation – was observed in most countries in the region, albeit with varying intensity. On the other hand, extraordinary measures such as the postponement or rescheduling of elections or the introduction of health restrictions created structural asymmetries that provided more favourable communication and organisational conditions for those in office.<sup>24</sup> Thirdly, it turned out that a crisis situation does not automatically create an incumbency advantage. In North Macedonia, for example, declining turnout and political tensions led to a weakening of the incumbent party's results, suggesting that the balance of political power, the organisation of the opposition and the media environment influence the development of incumbency at least as much as the crisis itself.

Based on the study, it can be concluded that the elections held during the COVID-19 pandemic demonstrated the importance of the institutional component of incumbency. Incumbents' access to resources, agenda-setting power, and communication advantage can give them an edge even when the general political environment is not clearly favourable to them. At the same time, these advantages raise questions of legitimacy, especially when extraordinary procedures are implemented at the expense of fair competition.

*T10. In most of the cases examined, elections held during COVID-19 strengthened the positions of incumbents, but the extent of this effect depended heavily on the type of political system, the strength of the opposition, and asymmetries in campaign conditions.*

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<sup>24</sup> T. S. James and S. Alihodzic, 'When Is It Democratic to Postpone an Election? Elections During Natural Disasters, COVID-19, and Emergency Situations', *Election Law Journal* 19, no. 3 (2020): 344–62.

*T11. The use of extraordinary electoral procedures – including date changes, campaign restrictions and new voting techniques – increased the institutional component of incumbency and raised democratic legitimacy dilemmas.*

*T12. Incumbency in crisis situations is not an automatic phenomenon: the ‘rally around the flag’ effect only prevails if the appropriate communication, political and institutional conditions are in place.*

## 2.5. Theoretical and practical implications

The results of the dissertation allow for several theoretical and practical conclusions regarding the interpretation of the concept of incumbency, the quality of democratic functioning and the conditions of political competition. From a theoretical point of view, one of the most important lessons of the research is that incumbency cannot be considered a homogeneous phenomenon that functions in the same way in all political environments.<sup>25</sup> Based on the case studies examined and the literature reviewed, incumbency is a multidimensional construct consisting of a combination of institutional, communicative and social layers. The chances of political leaders retaining their positions are shaped not only by the electoral system and party structure, but also by the logic of the attention economy, psychological mechanisms activated in crisis situations, and the need for social stability.<sup>26</sup>

The thesis also showed that the empirical outcomes of incumbency appear differently at different political levels. In local politics, incumbency is a stable, structural factor that results in consistently high re-election rates. In national-level political communication, digital presence and the logic of personalised attention can amplify the visibility of those in office, especially in

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<sup>25</sup> This finding provides a distinctive European complement to the American research of Mayhew and Erikson: Mayhew, "Congressional Elections"; Robert S. Erikson, "The Advantage of Incumbency in Congressional Elections".

<sup>26</sup> See Marko Klasnja, 'Corruption and the Incumbency Disadvantage: Theory and Evidence', *The Journal of Politics* 77, no. 4 (2015): 928–42.

crisis situations.<sup>27</sup> National elections held under extraordinary circumstances draw attention to the fact that the political advantages of incumbency are often achieved through institutional adaptations or campaign restrictions, rather than solely through changes in voter preferences.<sup>28</sup>

From the perspective of democratic theory, the research warns that the advantages of incumbency can be considered legitimate only if they do not hinder the emergence of real political alternatives and the practical enforcement of government accountability. If incumbency structurally distorts competition—for example, through access to the media, the use of resources<sup>29</sup>, or the manipulation of legal procedures—the electoral process may formally retain its democratic character, but it may become substantively hollow. Incumbents as a political resource can be considered a factor contributing to democratic stability if they are accompanied by institutional checks and balances, transparent campaign rules and genuine media pluralism.

The practical implications point to opportunities for further development in several directions. At the level of electoral regulation, it is worth examining how the harmonisation or separation of electoral cycles affects the position of incumbents from the ruling party and what mechanisms can ensure fair competition. In the area of campaign rules, it is particularly important to clarify the norms governing digital communication, as social media plays an increasingly important role in attracting political attention. In the field of media and platform

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<sup>27</sup> W. Lance Bennett, 'The Personalisation of Politics: Political Identity, Social Media, and Changing Patterns of Participation', *The ANNALS of the American Academy of Political and Social Science* 644, no. 1 (2012): 20–39, <https://doi.org/10.1177/0002716212451428>.

<sup>28</sup> Dominik Schraff, 'Political Trust During the Covid-19 Pandemic: Rally Around the Flag or Lockdown Effects?', *European Journal of Political Research*, 2021.

<sup>29</sup> Steven D. Levitt and James M. Snyder, 'Political Parties and the Distribution of Federal Outlays,' *American Journal of Political Science* 39, no. 4 (1995): 958–80, <https://doi.org/10.2307/2111665>; Tamás Vasvári, 'Grant Schemes and Pork-Barrel Politics in Local Government Funding in Hungary', *Europe-Asia Studies* 76, no. 9 (2024): 1371–91, <https://doi.org/10.1080/09668136.2024.2324065>; Tamás Vasvári, 'Beneficiaries and Cost Bearers: Evidence on Political Clientelism from Hungary,' *Local Government Studies* 48, no. 1 (2022): 150–77, <https://doi.org/10.1080/03003930.2020.1768852>; James Zachary Klingensmith, 'The Impact on Pork-Barrel Spending on Incumbent Fundraising', *SSRN Electronic Journal*, advance online publication, 2015, <https://doi.org/10.2139/ssrn.2654797>.

policies, the transparency of algorithmic visibility and the regulation of political advertising are areas that directly affect the communication advantages of incumbents. In local politics, supporting the next generation of politicians and improving the chances of challengers are institutional tools without which the balance of competition may be undermined in the long term.

Overall, the results of the dissertation emphasise that incumbency is one of the most important indicators of the state of democratic competition. It shows the extent to which a political system is able to maintain a level playing field and resist processes of resource concentration that can lead to a decline in democratic quality.

### **3. Contribution of the research to academic discourse and directions for further research**

The main contribution of the dissertation to the empirical findings detected in the literature lies in its exploration of the phenomenon of incumbency from a complex, multidimensional perspective, which is consistent with the international literature and adds new findings based on Hungarian and regional empirical experience. From a theoretical point of view, the thesis refines the concept of incumbency, interpreting it not as an automatically applicable but as a context-dependent political advantage.<sup>30</sup> Based on the cases examined, it becomes clear that the advantage derived from the position only becomes a measurable political advantage in certain institutional, communicative and social configurations, and that the patterns known from American studies, which show stable and high re-election rates, are only applicable to a limited extent in the Central and Eastern European region. The thesis thus contributes to the reorganisation of theoretical thinking on incumbency by emphasising the multivariate and contextual approach<sup>31</sup> without which the political logic of the phenomenon cannot be fully understood.

At the empirical level, the research examined the functioning of incumbency in three separate yet complementary political arenas: the Prime Minister's Facebook communication, the re-election rates of mayors of county-level cities, and the national elections held in the five regional countries during the pandemic. Together, these three perspectives provided a panoramic view that allowed for a comparative interpretation of the dynamics of incumbency, showing how communication, institutional, and extraordinary political conditions influence the emergence of the advantage. The examination of the local political level showed that incumbency is a structural and persistent phenomenon in Hungarian municipal politics, the analysis

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<sup>30</sup>Schraff, "Political Trust During the Covid-19 Pandemic: Rally Around the Flag or Lockdown Effects?"

<sup>31</sup>Gary King Andrew Gelman, 'Estimating Incumbency Advantage without Bias', *American Journal of Political Science* 34, no. 4 (1990): 1142–64; Ansolabehere and Snyder, 'The Incumbency Advantage in U.S. Elections'.

of the Prime Minister's digital communication highlighted the attention economy dimensions of incumbency, while the national elections held during the crisis revealed the democratic consequences of the relationship between incumbency and extraordinary procedures. From a methodological point of view, the contribution of the dissertation lies in its conscious combination of qualitative, quasi-quantitative and comparative techniques, thereby creating a complex analytical framework that is suitable for the multifaceted examination of political phenomena. The juxtaposition of different data structures and analytical logics has made it possible to interpret different forms of incumbents and has also highlighted that a comprehensive understanding of the phenomenon can only be approached with such a complex methodology.

The normative-democratic conclusions of the dissertation point out that the political significance of incumbency goes beyond individual election results, as it directly affects the structure of democratic competition and the institutional conditions of accountability. The advantage derived from the position can be considered legitimate if the chances of the actors participating in political competition are not distorted to such an extent that the emergence or success of challengers is made impossible. If incumbency becomes a systemic advantage due to access to state resources, manipulation of legal procedures or media inequalities, electoral competition remains formal but becomes empty in substance, and the mechanisms of political accountability are weakened. The results of the research suggest that incumbency in itself is not contrary to democratic norms and may even stabilise the political system under certain circumstances. The problem arises when the advantage derived from the position results in such a competitive advantage that it hinders the emergence of meaningful political alternatives. From the perspective of democratic quality, it is therefore crucial to determine what institutional checks and balances, campaign rules and media

pluralism ensure equal opportunities, and how the potentially distorting effects of incumbency can be counterbalanced.<sup>32</sup>

The limitations of the research also contribute to the identification of areas for further investigation. One methodological limitation of the dissertation is that the three case studies use different data structures and source qualities, which affects the comparability of the results. While the mayoral election data for county-level cities is fully accessible, the analysis of the national elections during COVID is based on secondary sources, which do not always allow for a quantitative assessment of the effects of incumbency. The analysis of the Prime Minister's Facebook activity was qualitative in nature, thus necessarily requiring interpretative decisions and not measuring the actual effects of social media algorithms. In the case of mayoral incumbents, the structure of Hungarian election data did not allow for the use of sophisticated metrics that are standard in international election research. Cross-country comparisons of elections during the pandemic were also limited because the institutional and political contexts of pandemic management varied greatly, and in several countries only fragmentary data were available on campaign activities and the effects of restrictions. These limitations do not invalidate the findings of the research, but they do highlight areas where further studies could provide more in-depth analysis.

Several future research directions appear promising. On the one hand, there is an opportunity to build on the results of this thesis quantitatively, particularly through the use of complex statistical models and predictive tools that would be suitable for quantifying the causal relationships of incumbency effects. On the other hand, a shift towards qualitative research is also justified. In-depth interviews with incumbent mayors, representatives or campaign teams can help to uncover the decision-making mechanisms and personal strategies that

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<sup>32</sup>Javier Corrales and Michael Penfold, 'Manipulating Term Limits in Latin America', *Journal of Democracy* 25, no. 4 (2014): 157–68, <https://doi.org/10.1353/jod.2014.0066>; John M. Carey et al., "The Effects of Term Limits on State Legislatures: A New Survey of the 50 States," *Legislative Studies Quarterly* 31, no. 1 (2006): 105–34, <https://doi.org/10.3162/036298006X201742>.

shape the success of retaining office. Examining the dynamics within the party (e.g., candidate selection processes, primary mechanisms, or the functioning of local organisational networks) may be another important dimension in understanding incumbency. In addition, the results of the dissertation can be readily applied to the study of more recent crisis situations, such as the energy crisis or the political effects of the Russian-Ukrainian war, which have created new political and communication challenges.

The dissertation is therefore not a conclusion, but the starting point for a research programme that can be developed in several directions. The study of incumbency offers an opportunity to gain a deeper understanding of the structure of political competition, to make a normative assessment of democratic functioning, and to draw practical conclusions that can contribute to strengthening the institutional environment that ensures fair competition and accountability.

## The doctoral candidate's publications on the topic of the dissertation

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