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# **RUSSIAN SOCIOLOGICAL REVIEW**

**2021 \* Volume 20 \* Issue 4 (Special Issue)**

# **СОЦИОЛОГИЧЕСКОЕ ОБОЗРЕНИЕ**

**2021 \* Том 20 \* № 4 (Тематический номер)**

# RUSSIAN SOCIOLOGICAL REVIEW



2021. Volume 20. Issue 4

Special Issue

“Perturbations of Private and Public under COVID-19”

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- To provide a forum for fundamental issues of social sciences.
- To foster developments in social sciences by enriching theoretical language and vocabulary of social science and encourage a cross-disciplinary dialogue.
- To provide educational materials for the university-based scholars in order to advance teaching in social sciences.

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The *Russian Sociological Review* invites scholars from all the social scientific disciplines to submit papers which address the fundamental issues of social sciences from various conceptual and methodological perspectives. Understood broadly the fundamental issues include but not limited to: social action and agency, social order, narrative, space and time, mobilities, power, etc.

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- Формировать корпус образовательных материалов для развития преподавания социальных наук.

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Журнал «Социологическое обозрение» приглашает социальных исследователей присылать статьи, в которых рассматриваются фундаментальные проблемы социальных наук с различных концептуальных и методологических перспектив. Нас интересуют статьи, затрагивающие такие проблемы как социальное действие, социальный порядок, время и пространство, мобильности, власть, нарративы, события и т. д.

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Журнал является электронным и распространяется бесплатно. Все статьи публикуются в открытом доступе на сайте: <http://sociologica.hse.ru/>.

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## Perturbations of Private and Public under COVID-19\*

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This issue of the Russian Sociological Review deals with the transformation of the public and the private in the situation of the COVID-19 pandemic. We could not but respond to current events since they are not only important for understanding the constitution of contemporary societies, but also challenge many common notions of the social sciences. We decided to focus on this topic, first of all, because the question of the private and the public constitutes the main “nerve” of the sociopolitical processes triggered by the pandemic.

In this introduction to the issue, we will offer some general considerations regarding the dynamics of recent changes, and a more detailed outline of the issue’s idea and overview of the papers published here.

### I

In the habitual vocabulary of political thought, which is, of course, neither the only possible one nor the only legitimate one but whose influence and widespread distribution is difficult to dispute, the political equals freedom. The political appears with the *polis*; the organization of the human community on the principles of freedom is called *politeia*. Of course, free *politeia*, as Thomas Hobbes pointed out at the dawn of the Modernity, is an ambiguous concept. Those who understand it as if it were about the freedom of citizens in a state are wrong; it refers only to the freedom of one political community from coercion by all others. We still call it sovereignty, and we know that a “free city” is not one with

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\* The results of the project “Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic”, carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

the most freedoms, but only one that is not subject to anyone from outside and determines for itself what should be considered as freedom within it. History is well known for independent political formations within which a rigid order reigns. If we ignore this distinction, it is possible to turn the notion of political freedom into an effective weapon: the freedom of political action is recognized only for those *politeias* where the citizens as well as the rulers are free. This can be achieved by eliminating the distinction between internal and external politics. In doing so, the borders of states become less and less solid, and political actors turn out to be a variety of associations and organizations deprived of a state-territorial identity. We have been witnessing this trend for the past few decades, but now this movement has slowed down and even reversed. This can be called the global retreat of globalization and the return of the state. However, globalization has not disappeared, nor has the old state returned.

In today's world, restrictions on freedoms are on the rise, and it is easy to assume that the pandemic is to blame. All over the world, without coordination with each other, the political authorities of various countries have imposed and are still imposing restrictions that, in effect, mean — in a state of emergency — the restriction of rights and the abolition of freedoms. Above all, this has affected the freedom of movement, but also the freedom of assembly. The inviolability of the home is also in danger, and much more. The intrusions of political authorities into the area of the disposal of one's own body have endangered the dignity of the individual. The reason for such measures is the need to defeat disease. The emergency characteristics of these measures means that once the pandemic is defeated, they will be abolished. This happens, of course, but we see that with a new increase in threat, restrictions can be imposed again. The final return to the pre-pandemic condition has not occurred; rather, we deal with varying forms and degrees of the unfreedom.

Many restrictions on freedoms have been previously introduced for other reasons, for example, in connection with terrorism. Security in transport, in educational institutions, and in public places was a response to new threats, including epidemic ones, albeit on a smaller scale. All this has long ago begun to change the landscape and the rhythm of public life. What is happening these days only manifests, to the greatest extent possible, the old trend. The security checkpoints and the time spent on inspections have become as commonplace an appurtenance of the modern city (subways, shopping malls, theaters, train stations, and airports) as the fortress wall and the gate with guards used to be. It is possible that masks, tests, vaccines, QR codes, restrictions on the number of participants in events and various prohibitions on movement as well as quarantines, which, by the way, are inherited from much earlier times, will become an indispensable part of modern urban life. The city is a place of safe freedom, but the safest city is also the most unfree. It turns out that unfreedom is needed for safety, while freedom is needed by the opponents of safety. To put it more radically, the person who wants freedom is now the *enemy of security and health*.

This is the police point of view. It is the police approach that has prevailed in many areas of practical politics. As Hobbes said, the state offers protection in exchange for obedience.

What is wrong with this thought? The answer is its automatism and its obviousness. It emerges as if by itself and needs no justification. It ignores the specificity of the organization of human life, which in contemporary philosophy is called *biopower* and *biopolitics*. Biopolitics means the disposal of living beings as obedient objects — their health, the birth and upbringing of children, nutrition and recreation, hygiene, and vaccinations. Self-organization and conscious choice are replaced by political management. Biopolitics inherits the theory and practice of the police state. The modern state arises with the introduction of sanitary-police measures and the strengthening of the institutions charged with taking care of the common good. One of the problems facing the police state from the very beginning is precisely that of epidemics. In dealing with the problems of health and security, the sovereign state has, in the course of history, destroyed a variety of freedoms that seemed self-evident, such as, for example, the privileges of certain guilds and estates or the republican freedoms in cities in Europe in the Middle Ages. This is a distant past, but we cannot help but recall it when we find a dramatic increase in the sanitary-police regulation that has risen to a new level in the era of biopower.

Therein lies the specificity of the moment. In today's world, there are many states with very different forms of political life and different interpretations of freedom. What makes them similar is the technique of biopower, since they all dispose of living human beings, space, rhythm, and the way of preserving their lives, employing the same or similar ways of identifying threat, restricting freedom, and sanitary and police management in an emergency situation. This similarity between the states allows for another twist in the consideration of the topic. So far, we have been talking about states taking sanitary measures as if it were something obvious, and the desire to alienate at least some of the freedoms occurs in a quite benign environment. In fact, this is not the case. We remember well that, for several decades, one of the most common ideas was that of "globalization". Globalization meant broad, intensive, and ever-increasing connections between countries, the diminishing importance of national borders, the broadening role of international organizations and institutions, and the widespread use of electronic communications and networks that make the instant connection between people and events around the world possible.

This may have seemed a freedom that was increasingly guaranteed and protected by international law and related institutions. To a certain extent this was freedom, but its nature needs clarification. At the turn of the millennium, the famous sociologist Zygmunt Bauman coined the term "globalization elite". Indeed, at that time, there emerged people and groups who benefited most from freedom of movement, from the actual destruction of borders. These were the businessmen and managers of the global economy, the people of the arts and entertainment trade, the scientists who travel between universities, and the staff of international organizations including educational, environmental, and human rights organizations. Bauman wrote that, at the same time, in their home countries, ordi-

nary people were losing the war for space: public spaces were disappearing, being fenced off, privatized, etc. Obviously, the elite of globalization can set patterns of behavior and lifestyles for the broader strata. World tourism has also meant a new modus of freedom which is not necessarily linked to civil liberties: someone who lives in an expensive hotel, resort area, or spends most of their time in a business park in a foreign country does not need liberties for the locals in the first place, but security and order. Environmental movements and the protection of rights, however, have different constitutions.

The current situation also means the collapse of this freedom as spatial mobility. It directly affects the interests of the globalization elite and destroys the way of life it has fostered for the much broader strata involved not only in tourism and its services, but also in the entire functioning of islands of global society around the world. An objective contradiction arises between the freedom of state disposal of sanitary and police biopower in its territory (including police guarantees to the exclaves of globalization) and the freedom of the globalization elite that maintained the functioning of the world systems through its mobility. (The topic of migration suggests itself here, but should be considered in another place.)

One obvious solution to this problem is the existence of electronic communications and networks, which, in theory, need neither territory nor security guarantees to ensure uninterrupted instant (real-time) communication between all participants in the processes. However, "electronic freedom" has a number of features that make it increasingly undesirable for states that gain momentum again. We can put aside here a rather popular topic, namely, the direct interference of networks in the political process. The discussion of this topic all too quickly leads us to the question of good will and bad will, of whether it is possible to change the notion of law and the desire to comply with national legislation on the part of the so-called "Internet giants". It seems to us that the question is different, and much more complex. Instantaneous connections between territorially distant participants in communications lead to the emergence of numerous communities that cannot be fixed in the territory at all. Their formation and disintegration, topics of discussion, and ways of self-identification may not make any intelligible political sense, nor pose any immediate political threat. In the long run, however, they cannot help but undermine the bond between localization and representation that serves as the basis of the legitimacy of any modern state.

In restricting freedoms and reclaiming power, the modern state assumes that disruptions of the link between the localization of populations in territory, national solidarity, and security (including epidemic security) were temporary, whereas the modern restriction of freedoms and the closure of borders is a return to the norm. Although some systems of communication are almost impossible to "return inside the borders", it is hard to doubt that only temporary successes await states along the way. We cannot permanently count on the interconnection between protection and obedience to be a decisive argument, especially for those who regard neither life nor health as such an unconditional value.

## II

Of course, the processes described above are multidimensional. There are other aspects as well. For example, we can see new alliances between knowledge and power, which, on the one hand, reinforce already-existing practices of biopower and, on the other, introduce something completely new. However, it is precisely the relationship between the public and the private, as one of the central dimensions of any society, that becomes a point of convergence for many other processes in a pandemic situation, a subject of multiple stakes, and a node of many conflicts. The sanitary measures recommended and undertaken by various authorities and organizations around the world lead to an unprecedented intrusion into the daily lives and bodies of citizens, previously considered a strictly private domain. At the same time, public spaces are being filled by those who are willing and ready to express their opposition to such interventions.

For the social sciences, the emerging situation in which certain social trends are already on the rise but have not yet taken their final form is of particular importance, since the current changes affect the pillars on which the division between the public and the private is based in the contemporary world. First, the notions of the *legal* and the *legitimate* which always accompany the drawing of the boundary between the private and the public are being transformed. Emergency measures become a reality not only as a socio-technical component of everyday life, but also as a political reality claiming a higher status than legislation. The object of these measures, the population, faces a constant stimulation to legitimize decisions that appeal to the supreme value of individual life and, in this respect, inherently devalue all other considerations. A large part of the population rejects this regime of constant legitimation, and either resorts to tactics of evasion of the measures imposed on them or resists them outright, questioning the legitimacy of the emerging social order.

Second, there is a change in the content and ways of conducting *public life*. The boundary between public and private, which traditionally coincided with the work/leisure division among other things, begins to move away from the latter, so that previously public forms of activity migrate into private spaces. The most obvious trend of this kind is the move of work and learning into the homes. This inevitably transforms the way relevant public practices are carried out, not only by making the home part of the work environment (if only as a background behind the shoulders of the person looking into the camera), but also by changing the way these practices are carried out (for example, the way work meetings are conducted). Paradoxically, distance working and distance learning do not mean an increase, but a reduction or disappearance of distance to work and learning. The digitalization of work and learning, which has become one of the most visible features of the pandemic, has not, at the same time, led to the decline of the “old” publicity. On the contrary, we can observe a strengthening of those forms of public engagement that involve collective action, from volunteer initiatives to mass protests against the introduction of restrictive measures. The public came into motion throughout the social

space, including in those professional communities that seemed to be the most prepared for new forms of public, for example, among IT professionals.

Third, we see changes in the way people *interact with each other*, especially in public places. The pandemic has created new habits and forced us to invent new ways of doing things. We look at the people we encounter differently, and we construct our social actions differently. This is happening both in the physical world and in the digital world. In the physical world, we are beginning to use new forms of categorizing others and new strategies for orienting ourselves to the rules of public behavior. For example, we invent new forms of handshaking. In the digital world, we are changing strategies for expressing our point of view, depending on the opinions on the pandemic of those people with whom we have online contact. The pandemic puts considerable pressure on our interactions, forcing us to pay attention to the aspects of our interactions with others that were previously self-evident, such as physical distance. As a result, not only do we begin to behave differently, but we also become available to the condemnation or praise from the others in situations where our conduct was not of interest before.

Fourth, the practices and perceptions associated with *the private* inevitably change. The home, which often used to serve as a “shelter” from the public, can become a trap when the amount of time spent there increases. The severity of this situation is experienced differently by different categories of people. It has the most devastating effects on those who are considered “in charge” of the private sphere — women. The pandemic, by opening access inside the home to those who have often or always remained outside it (such as the police and employers), simultaneously encapsulates the home, making its borders less permeable to those who live in it. This poses a threat to members of vulnerable social groups, making them more helpless and defenseless. Another aspect of the transformation of the private is the increasing role of the medical gaze in the sphere of private interactions and bodily practices. Not only are we subjected to constant medical supervision, but we involve ourselves in this supervision by medicalizing our relationship with our bodies. This medicalization becomes a moral imperative: we are obliged to take care of our health not because we have to observe certain social proprieties, but because we have to try not to harm the health of others. Our private relationship with our bodies becomes subject to public scrutiny.

The four aspects of the transformation of the public and the private mentioned above are reflected in the articles collected in this issue. Andrei Korbut's article deals with the specifics of following the pandemic rules. The author notes that if we consider the adherence to these rules as a public activity, it reveals a grey area, that is, an incomplete adherence to the rules, which, however, is similar enough to full adherence to them to not cause conflicts or punishment. The phenomenon of the grey zone extends our understanding of how public space is transformed when it becomes subject of the regulation by multiple agencies that impose rules of behavior. The pandemic allows us to study these processes with much more clarity than the pre-pandemic situation, because it makes the rules “material”: they are communicated to the population in the form of inscriptions, images, and signs, and involve the use of certain objects like masks and gloves. In this re-

spect, social scientists who have long been concerned with the problem of rule-following have an opportunity not only to apply their concepts to the new social reality, but also to transform some basic categories of sociological thinking.

Mark Belov's article on the problem of legal order in a pandemic raises the question of what are the legal grounds for the imposition of anti-COVID measures. By analyzing Russian legislation, the author shows that lawmakers essentially establish a state of emergency without declaring it. This allows the existing legal order to be reinforced by extending emergency measures for as long as the authorities deem necessary. Legal space begins to build not around the real danger of COVID-19 to the population, but around forms of control over the population. Ironically, these transformations of legality are confirmed by the mass protests against the imposed measures observed around the world. The author points out that these protests are in fact aimed at preserving the legal order, i.e., they follow the same logic as the laws against which they are directed. According to the author, the negative reaction of the authorities to these protests is explained by the authorities' attempt to retain a monopoly on legal violence. Thus, the legal novelties incited by the pandemic create new grounds for the inclusion and exclusion of certain social groups from the public space.

Daria Litvina and Anna Temkina's article focuses on the boundary between the public and the private, which has been problematized by the pandemic. Analyzing the experience of one social category (academicians), the authors show that even this privileged group whose working conditions did not change as radically as many others' in the pandemic situation has great difficulty in reassembling its professional and personal identity. Tasks previously separated in space and time overlap, leading to a significant increase in the moral burden on members of the academic professions, making them feel anxiety, guilt, and shame. The authors show that this group copes with the intense moral distress generated by the pandemic by developing habits that allow them to find new grounds for stabilizing their selves and their private and public lives. In this sense, the experience of academicians can be extended to many other social groups forced to seek new foundations for self-identity in the face of a radical shift in the boundary between the private and the public.

The article by Arthur Atanesyan, Anahit Hakobyan, and Bradley Reynolds focuses on the changes in public communication practices in the digital space. Summarizing the results of previous studies and analyzing the data from their study of Armenian Facebook users, the authors conclude that online behavior in a pandemic situation can be described using the Spiral of Silence Theory: when expressing their opinions about COVID-19 and the measures taken to combat it, social media users refrain from expressing views that contradict, in their opinion, the generally accepted viewpoint. This leads to an even greater marginalization of their views in public space, despite the fact that these views may be dominant in private life. As a result, the discrepancy between people's actual behavior and their expressed opinions only increases. The authors show that social media, as a public venue for expressing one's opinions about COVID-19, can be perceived as a too-unpredictable environment, requiring the use of communication strategies of concealment and

silence. This is a major research challenge for social scientists, as it challenges them to find new ways to reconstruct how different social groups perceive the current situation.

The article by Svetlana Bankovskaya, Javad Maddahi, and Tahere Lotfi Khachaki describes the changes taking place in the paradigmatic private setting of the home in a pandemic situation. Based on interviews with Iranian women describing their experiences of lockdown and the pandemic in general, the authors reveal the transformations in perceptions and practices related to the home: there is an increase in domestic violence, including physical, psychological, and economic. As a result, the home begins to be perceived not as a shelter, but as a trap from which it is impossible to escape. The experience of Iranian families reflects one of the trends related to COVID-19 of the strengthening of the symbolic and material role of private spaces can lead to the increase in the number of barriers to communication between private spaces and the public sphere, effectively depriving certain social groups (primarily women with families) of control over their lives. This shows that, in a pandemic situation, the private sphere can collapse rather than expand, due to the expansion of certain social relationships and an increase in interpersonal violence.

Finally, Ksenia Shepetina's article outlines the changed moral landscape of public life in a pandemic situation. Analyzing the transformation of the ways of perceiving and categorizing others in public spaces (first of all, in public transport), the author identifies processes related to three categories of others (non-specific, specific, and stigmatized): stigmatized others become even more stigmatized, while the other two categories are homogenized. This suggests that COVID-19 not only introduces yet another basis for perceiving and evaluating others in public spaces, but also transforms habitual social interactions in public spaces. To what extent these changes will take hold is still too early to judge, but they should definitely be taken into account in future research.

These and other issues related to the perturbations of the private and the public during the COVID-19 pandemic are also discussed in book reviews by Nail Farkhatdinov, Irina Trotsuk, Elizaveta Zakharova, and Varvara Kobyshcha.

In publishing this issue, we certainly do not pretend to cover all aspects of the ongoing transformations of the public and the private. Nevertheless, we hope that the articles presented here will provide social scientists with important analytical tools with which they can monitor and describe social processes that have previously escaped the attention of researchers.

# COVID-19 and the Grey Zone of Rule-Following\*

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The paper deals with the phenomenon of the *grey zone* of rule-following — actions that may be perceived as both corresponding to some rule and as breaking this rule. The pandemic of COVID-19 brought the grey zone into relief because a significant part of the responses to imposed anti-COVID measures consists in following new rules less than completely, with the typical example being a lowered mask that covers only the mouth and not the nose. It is argued here that grey-zone actions, if viewed as public activities, have specific spatial and temporal social organization: they are designed to be flexible and oriented toward the possibility of completing them if necessary. At the same time, they are produced to be observably accountable as actions-according-to-the-rule, to prevent an attribution to the actor rule-breaking. The paper also describes some properties of situations where grey-zone actions produce tension, forcing the actor and other participants to initiate an argument or a conflict. The main point of the paper is that performing actions belonging to the grey zone of rule-following does not testify to the actor's non-observance of the rule. It is better to describe grey-zone actions as *rule-oriented* and not *rule-following* or *not-following*. This suggests that social scientists should abandon dichotomic approach when analyzing rule-following activities, and pay more attention to the participants' own practices of making sense and order of rules.

*Keywords:* COVID-19, pandemic, rule-following, everyday actions, public activities

## Introduction

The COVID-19 pandemic has provoked a rethinking of many sociological concepts and approaches. However, one of the central sociological categories — the “rule” — has so far remained outside the attention of social scientists who considered the social consequences of the pandemic.<sup>1</sup> Perhaps the reason lies in the deeply-rooted intellectual habit of viewing the practice of rule-following as dichotomous: it is assumed that everyday actors either follow the rule or do not follow it. Correspondingly, the reasons *why* actors do or do not follow the rule are of the greatest interest (see, e.g., Clark et al., 2020; Moaddel et al., 2021; Sedgwick et al., 2021; Siz et al., 2021). However, the pandemic also raises broader questions relating to the sociological understanding of “rules”. We are witnessing a unique situation when different but overlapping systems of new rules, designed to regulate not only rare events (like flying a plane or crossing state borders) but also the most

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\* The results of the project “Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic”, carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

1. Even the discussion of the crucial figure in the debates on the problem of rule-following, Ludwig Wittgenstein, in the context of COVID-19 goes without considering this problem (Malviya, 2021).

ordinary situations (like going to the store or even just going outside), are being introduced simultaneously around the world. This avalanche of rules — moreover, explicitly formulated rules, communicated via stickers in public transport and stores, stripes on the pavement, messages on TV, columns in newspapers, etc., — provides a good opportunity to reconsider some sociological notions of how rules are created, disseminated, enforced, and adopted. At the same time, the pandemic hampers the discussion of the problem of rule-following as it forces us to focus primarily on the sources of rules and the motivations of actors. As a result, researchers ignore how participants themselves make sense of the rules in everyday situations. In what follows, I will try to examine this very aspect, namely, the way in which everyday actors give meaning to the rules which they have not created. I will analyze a phenomenon that, on the one hand, has been the subject of heated public debate during the pandemic and, on the other hand, has been ignored by social scientists even though it is most directly related to the longstanding sociological problem of rule-following. I will call this phenomenon the *grey zone* of rule-following.

While the analysis in this paper will not be a detailed investigation of real-world practices, the purpose is to lay the grounds for further studies into everyday doings and sayings. I will try to outline some *organizational objects* (as Harold Garfinkel called them) that ordinary actors orient to, and which they produce when following pandemic rules. I will provide *reasoned conjectures* (to use another phrase of Garfinkel) about the local order of some practices that emerge in the COVID-19 situation.

What is the grey zone of following pandemic rules?

### The Grey Zone of Rule-Following

The pandemic has given rise to a widespread and recognizable social phenomenon, illustrated by such acts as:

- Not wearing the mask fully on.
- Social distancing, but not enough.
- Taking only the first component of a two-component vaccine.
- Using a mask designed to last just a couple of hours over several days or weeks.
- Washing hands without soap after coming in from the street.

The paradigm of these situations is, of course, the mask pulled down under the nose or resting on the chin. What all these situations have in common is that the actor performs an action explicitly oriented toward the rule and following it, but following it “less than fully”. This is a grey zone of rule-following.

The grey zone of rule-following are those actions that may be presented as conforming to a rule, but may also be perceived as rule-breaking. These actions differ both from “flawless” rule-following (if such “flawless” following is possible at all) and from explicit non-compliance, and can become, therefore, an occasion for conflicts and confrontations.

Actions that fall within the grey zone of rule-following can have several interactional meanings. Firstly, they can express a particular political or public position (e.g., “I don’t believe in the existence of the coronavirus” or “These rules are just a whim of the authorities”). While expressing attitudes toward the reason for the rule or toward the institution and the individuals introducing and/or enforcing it, these actions do not take the form of an outright rejection of the rule. The rule is waived only to the extent that its waiving may reflect the position of the actor without creating a reason for accusing her of not-following it. Thus, such actions allow to *express* a certain position without *stating* it, unlike the action of open and direct opposition to the rule. It might be said that this is a way of supporting a view different from one of the rule’s adherents, while being reluctant to refuse to follow the rule. Reasons for maintaining this general appearance of following the rule while simultaneously changing some aspects of “full-fledged” following can be the fear of legal punishment, the avoidance of condemnation by others, or the unwillingness to start an argument.

Secondly, actions belonging to the grey zone of rule-following may be the result of situational “contagion” when many people around the actor either follow the rule fully or act in grey zone themselves, prompting the actor to follow it, too. In this case, the actor is oriented towards the actions of others as actions that constitute the normal background of everyday life. Each ordinary actor navigates the situation and understands what is happening at each moment using the actions of others as a resource for understanding and making sense of it (Goodwin, 2018). This is most vivid in crowd behavior where many participants orient themselves to what is happening in a part of space that is invisible to them and to how they should behave through the actions taken by the people immediately present around them. In the pandemic situation, this orientation mechanism could lead to the repetition of some others’ actions, thereby producing the grey zone. The grey zone of rule-following shows, however, that such “contagion” is not an exact “imitation”. Rather, the actor, in replicating the way others act, relies on others’ understanding of what is going on as a potentially assumed sense of the situation. For example, seeing other passengers on the bus begin to pull the masks on, a passenger may also pull on a mask, but leave her nose free to support a shared understanding of the situation without resorting to a more serious form of solidarity expressed in the copying of others’ actions. Furthermore, the actor may thereby show “respect” for others, that is, observe the proprieties that are visibly important to those around her. Or, such situational “contagion” may indicate that the actor perceives the actions of others as indications of approaching danger that she does not see coming (e.g., the entering of rule-enforcing officials).

Others who “infect” the actor with rule-following may include people in close relationships with the actor (friends, relatives, colleagues, classmates, acquaintances, etc.). These relationships usually require both a much greater degree of orientation towards the others and a wider demonstration of solidarity, including through the doing of similar actions. In such situations, committing an action belonging to the grey zone allows the demonstration of a sufficiently large measure of solidarity, but not an excessively large

one (presupposed by the copying of the other) which may be appropriate only for specific occasions.

Thirdly, the grey zone can also be a space for expressing disdain for rules imposed by the other(s). In this case, the actor may be responding to the formal characteristics of the rule as something binding. The specific source of the rule, which is crucial when expressing a political or public position, does not matter here because the actor is only responding to a rule as coming “from the outside”. A concise formula for this way of rule-following might be “OK, I’ll do as you want”. Such situation is familiar, for example, to those charged with enforcing a rule. Coercion to comply with it may result in the “viola-tor” performing a grey-zone action (e.g., pulling on a mask, but only over the mouth) that should satisfy the enforcer, but is done in such a way as to show that the actor is only complying with the rule under pressure.

All this points to a key characteristic of the grey zone of rule-following: such actions must be *sufficiently similar* to the rule-following actions to not give observers the impression of rule-breaking, but also *visibly deviate* from the rule-following for observers to be able to refer to the actor’s non-compliance with the rule. The very similarity of grey-zone actions to “full” rule-following creates uncertainty in the observer about the extent to which these actions can be attributed to non-compliance to the rule. This uncertainty, in turn, reduces the self-confidence of the one who might want to point out the deviation of a given action from the rule. In this respect, the grey zone is not so much a space for managing the impression, but rather for managing the consequences the action is going to have.

The grey zone includes a rather vast range of actions because numerous variants are possible between the full compliance and the full non-compliance of a rule. Of course, both following the rule and not-following it are not absolute since these characterizations of action are situationally produced and determined. However, what lies “in-between” demonstrates a much greater uncertainty and the possibilities of organization. For example, between the complete absence of a mask and putting it on the nose and mouth, one finds actions differently oriented to the rule: some keep masks in their pockets or bags, some hold masks in their hands or put it on their arms, some have a mask on their chins, and some have masks covering their mouths but not their noses. Each of these actions is a suitable “launching pad” for various other activities, but they all demonstrate an obvious orientation to a rule, that is, they are produced to be able to demonstrate the adherence to a rule at any time or at a particular time.

I will consider the grey zone as a transitional area of conduct which has two components: the preparation for performing an action and the performance of action. The mask should not be held in hand, but if it is, this may indicate that the actor is either about to put it on or is holding it in case it needs to be put on. Social distancing can be prepared for (e.g., by pressing one’s bag to one’s side) and it can be accomplished (by stepping sideward). This distinction is important because for the actor preparing to perform the action may be a part of the action itself, whereas it may not be so for the observer. For example, the mask held in hand may be evidence of non-compliance with a rule for the

police officer, while for the one holding it, it may be an element of the preparation for the action as well as an excuse for doing the action and a tool for redefining it (“I was about to put it on”).

It is also important to note that when we speak of the grey zone of rule-following, we are referring to actions performed not only in the presence of other people. Since society does not disappear when the people around us disappear, solitary actions may or may not fall into the grey zone just as much as actions amidst other people. Just because it becomes easier to disobey a rule in the absence of others, this does not mean that this is going to be the case. Moreover, to the extent that we are able to orient ourselves toward others even when we cannot see or hear them, we are even more likely to maintain this orientation through actions belonging to the grey zone when left alone since they allow us to reduce the rulefulness of our behavior without compromising its sociality. This is why many people, when alone in an elevator, do not take off their mask completely, but lower it below the nose.

In discussing the problem of the grey zone of rule-following, the issue of the intentionality of everyday actions cannot be ignored. Although I will consider grey-zone actions as if they were indicative of the actor’s orientation to some rule, it is certainly possible that the actor performs actions belonging to the grey zone because she *does not know* the rule, or misunderstands it. These situations, however, do not refute my observations since here I am interested not in the actors’ intentions, but in the *publicly available* meanings of their actions. Even if the actor, for example, has not stepped sideward because she is unaware of the rule of social distancing, her actions are still available to evaluation in regard to the following or the not-following the rule.

Grey-zone actions are not the results of some decision that is made and then rigorously observed. They have a *dynamic* structure which is expressed, on the one hand, in the spatial localizations of such actions and, on the other hand, in the temporal dynamics of entering and leaving the grey zone. Let us consider these two aspects.

## The Spatial Structuring of the Grey Zone<sup>2</sup>

Grey-zone actions can be observed more often in certain places that have a number of common properties. First of all, these are public places with a small “population” or, on the contrary, with a mass “population”. In the first case, the action may be related to the perceived reduction or disappearance of the actor’s danger to others — in the case of the pandemic, the danger of infecting others with COVID-19. In the second case, the grey zone emerges because of the difficulty of identifying an individual action in a stream of

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2. I will discuss space as an *interactional* phenomenon, that is, as something produced *in* and *for* interaction. This approach is closer to the notion of “region behavior” by Erving Goffman (1959: 106–140) than to the more structure-oriented approaches of Anthony Giddens (1984), Henri Lefebvre (1991), or Martina Löw (2016). Such an interactional approach involves an analysis of space as members’ achievement, as something created by members for interaction (Mondada, 2009) and related to membership category-relevant practices (Smith, 2017).

similar actions. For example, a person in a subway crowd may quite realistically assess the probability that her partially unmasked face will attract someone's attention as low.

Of course, it is not only the number of people present in the place that matters, but also their institutional role, in particular, the role of the person in charge of enforcing the rules for others. Since the beginning of the pandemic, all public places have been structured according to how strong and constant the surveillance of them is. For instance, this surveillance is expected to be greater in the subway than in the stores, in part because the subway is habitually perceived as the target of more strict "security" measures. And there are subspaces within such spaces that are more or less permeated by surveillance. Thus, some subway passengers pull a mask over their mouths when exiting the car because police officers or subway staff are expected to be on the platform. Similarly, some shoppers pull a mask over their mouths when approaching the cash register in a store.

Due to the specificity of COVID-19, one of the key aspects of actions in the grey zone turns out to be the distance to other people which has been problematized by anti-COVID measures, although it used to be an object of permanent attention for people interacting in public places even before the pandemic. Actors performing actions in the grey zone can employ this distance as a resource — as a cue indicating the possibility or necessity of performing a particular action, or as a "justification" for their actions (for example, by pulling down a mask below the nose after social distancing from others). The requirement of social distancing, in this respect, has a downside: the actor may believe that once she has achieved the prescribed distance, she is in a visibly safer area than before, and thus an incomplete compliance with the rule will be perceived as permissible. Consequently, the grey zone of rule-following will expand as the distance to others increases.

Another aspect of the spatial organization of the grey zone is an institutional character of the places where corresponding actions are performed. Different places in our societies are "assigned" (not only legally, but also socially) to different categories of institutional actors. For example, a doctor's office is "assigned" to a doctor, while the subway is "assigned" to police officers. Some membership categories (like police officers) have the right to "own" a wide range of spaces; other spatial "possessions" are limited to a small number of places. In any case, for the actor who is considered the legitimate "owner" of a certain place, being in that place can become an excuse for committing acts belonging to the grey zone. For example, sometimes police officers, doctors, taxi drivers, or shop assistants wear a mask at work without fully putting it on. This may be due to the fact that being in "their" place gives them more freedom to command that place and choose the line of conduct within it. This freedom of choice may lead to grey-zone actions. However, it should be kept in mind that this tendency is counteracted by the opposite tendency of performers of institutional roles to perceive themselves (when being in "their" place) as a model for others and thus to consider themselves obliged to fully follow the rules, not so much of a fear of sanctions, but because of the perceived need to be an example for others.

## The Dynamic Organization of the Grey Zone

The grey zone is a dynamic area of action, i.e., an actor can enter or exit it. It should be fluid and adapt quickly to the circumstances as they arise. When we talk about entering the grey zone, we need to distinguish between two starting points, those of the non-compliance with the rule and the compliance with the rule. A non-compliant actor may enter the grey zone for fear of sanctions (e.g., a fine or dislike from others), or under pressure from others (e.g., police or relatives). It may be a short-term event after which the actor reverts to non-compliance. Thus, some people entering the subway put a mask over their mouths while coming through the turnstiles and then take it off afterwards.

Rule-abiding actors step into the grey zone by weakening the adherence to the rule. There may be several reasons for this weakening. Firstly, as noted above, the configuration of those present may change in such a way that, at some point, there will be few people around the actor, or they will appear to be at a great distance, or they will disappear altogether. This may lead to a lowering of the mask, a reduction in hand-washing time, etc. Secondly, people who are forced to comply with the rule for long periods of time may feel entitled to enter a grey zone. For example, doctors may take their mask down, justifying it on the grounds that they have to sit in a mask for several hours. In this case, the grey zone becomes a “well-deserved” reward for rule-abiding behavior. Getting into the grey zone can also be related to the actor’s orientation to the temporal characteristics of the grey-zone action. For instance, an actor may briefly lower her mask during a conversation and then put it back on, assuming that no danger to the interlocutor will arise in such a short time, and that the briefness of lowering the mask will be a sufficient apology to others.

The temporal organization of any action includes not only “absolute” characteristics like its duration (which, of course, does not correlate with astronomical time but with local social practices that determine whether an action can be considered “short” or “long”) but also the structural characteristics associated with the sequence of the acts within this action. For instance, any conversation has a beginning and an end which cannot be random, but involves particular sequences of cooperative actions (like greetings/response greetings and farewells/response farewells). In this regard, we may ask at what point in the course of the action the transition to the grey zone takes place. Although it is unlikely that one can give a generalized answer to this question, we can make a preliminary assumption applicable to various types of practices that the grey zone occurs more often not at the beginning and end of actions, but in the middle of them. For example, passengers entering a subway car pull their mask down only after some time, and may then wear their mask in this manner until they exit the subway. Similarly, passengers passing through the turnstiles with masks completely on pull it down only when they are at some distance from the turnstiles. These examples show, however, that on the organizational scale, grey-zone actions are placed closer to the beginning of the action than to its end. The end of the action is more often used for exiting the grey zone.

Actions that fall into the grey zone are ordered in such a way that they already contain some elements of ruleful behavior, or these elements can be quickly added. Therefore, the actors exit the grey zone more often into fully rule-following conduct than into non-compliance with the rule. In the first case, the strategy of completing an action is used when an action is brought to a finished form: a mask is lifted to the nose, a step is taken to the side, etc. This completion is sufficient in itself since it does not require any special justification, and, in the majority of cases, is initiated by the actor. In some cases, however, it may be initiated by the other, e.g., a salesperson may ask a customer to put a mask fully on or a train conductor may ask a passenger to do the same.

In contrast, exiting the grey zone into non-compliance often requires an overt justification and is fraught with serious dangers, unless it takes place in a safe environment. A safe environment may be a group of people who do not comply with the rule in the presence of whom a person may, for example, remove a mask that is not fully on without threat of being blamed (or even with expectation of being praised by others). Such an exit from the grey zone is likely to be accompanied by certain utterances and/or sounds (such as “phew”), demonstrating relief due to getting rid of the need to perform actions in the grey zone or justifying the necessity of performing them.

Exiting the grey zone into non-compliance with the rule is eased if the action is short and if the actor steps into grey zone from non-compliance. However, the difficulties associated with such an exit still discourage many actors, motivating them to stay in the grey zone as long as possible. Thus, for example, a taxi driver who puts the mask over her mouth immediately after a passenger gets into the cab finds it easier to keep it that way until the end of the trip (unless the passenger makes a request to put the mask on completely) than to remove it after some time. Similarly, the mask that has been pulled down while talking during a subway ride will often remain there for the rest of the trip.

## **Arguments and Conflicts over the Grey Zone**

The grey zone comprises actions that overtly demonstrate a rule-orientation, but are open to criticism as not conforming to the rule. The actor is aware that there is a rule that concerns a certain aspect of her behavior, but, from the observer’s point of view, either misinterprets the rule or does not comply with it. Therefore, the persons doing the action in the grey zone sometimes either needs to justify her action, or is forced to take part in the conflict initiated by someone who accuses her of not complying with the rule.

As for justifications, they can be initiated either by the actor or by others. The actor may find it necessary to accompany the action with arguments justifying it. In doing so, the actor may appeal to circumstances such as health (“I have trouble breathing”), fatigue (“I can’t take it anymore”), accident (“Oh, I forgot”), or preparation for the action (“I was just about to put it on”). In all of these cases, it is assumed that the actor understands that her action does not conform to the rule, but considers the proposed account strong enough for its addressee to take the account as satisfactory in the current circumstances. Such reasoning can accompany both the entrance to the grey zone from a situation of full

compliance with the rule and the opposite transition from the grey zone to a situation of full compliance with the rule. It is much less common in the transition from non-compliance with the rule to the grey zone, since, in this case, such an action is often performed to demonstrate rule-adherence, although it remains available to further accusations.

Provided accounts may also be designed to justify continuing to be in a grey zone in the future. For example, sometimes in response to the salesperson's request to put the mask on completely (when it covers only the mouth of the customer), the customer says indignantly, "I already have my mask put on!" In such cases, the actors purposefully use the always-present ambiguity of rule's formulation to justify the continuation of their line of conduct. Although such situations are much rarer than situations of changing the direction of action accompanied with justification, they show that the *similarity* of grey-zone action to an action that fully follows the rule is a systematic achievement and exploits the possibility of identifying the action through the details of its situational configuration. An action in the grey zone is an action that can pass as fully rule-following, although this does not necessarily imply that those who present will accept it as such. For example, in the above situation, the salesperson may remain silent in response to the customer's outraged remark, although this does not mean that the salesperson has now "seen" that the customer is wearing a mask, although previously thought the opposite.

One of the reasons why actors' counter-statements pointing to the inapplicability of the criterion of rule-following to their action (because it already conforms to the rule) do not meet with an objection is the reluctance of possible "objecter" to initiate a conflict. The unreasonableness of the accusation, presumed by such counter-statements, makes the person who requires following the rule a slanderer, and the requirement itself an offense. This is easily recognizable by any competent member of society as fertile ground for conflict, especially because such counter-statements have specific wording and intonation and are often accompanied by emblematic gestures. It is easy to avoid such potential conflicts, of course. However, it should be understood that conflict avoidance can occur even before there is occasion for the conflict. For instance, if the customer whose mask is hanging on her chin puts it on her mouth but not over her nose in response to the salesperson's request, the salesperson may be satisfied with such an action. This is because the insistence on a required action becomes the more difficult, the more cooperative was the previous action in response to the previous request. The very fact that the request, albeit not executed fully (from the requester's point of view), is executed in some way complicates the start of a conflict, for which, of course, there is a formal reason, because, as can be shown, the rule is still not fully followed.

Potential conflicts over grey-zone actions do not become actual primarily because the initiator of the conflict must either rely on the self-evident basis for the request — which, like every self-evident basis, can be met with a demand for the explication ("Why should I do this?"), — or provide arguments strong enough to compel full compliance with the rule. The person who points out the impropriety of some action will appeal, for example, to such things as institutional rules ("This is an order from the mayor's office"), negative consequences ("Otherwise our store will be closed"), morality ("You don't want to infect

anyone, do you?”), or health (“You don’t want to get sick, right?”), etc. All of these appeals will contain justifications for rule-following conduct and show that they are provoked by the actor’s “violation”. These appeals will also remove the personal responsibility from the initiator of the conflict for initiating it: they will show that the demand is advanced not because the one advancing it wants so, but because “these are the rules” or “this is how it is”.

Conflict, of course, requires communicative actions from both sides (if there are two parties to the conflict). If the person who calls attention to non-compliance of an action with the rule insists on her claim, the actor can assert her right to the action, not only by accusing the creators of the rule or its enforcers (in a pandemic situation, these are almost always different people) of making inappropriate demands, but also by questioning her own ability to follow it fully or in principle. For example, the actor may cite poor health or well-being, or claim that the rule is not doable at all (“I have nowhere to back off!”). In this case, the initiator of the conflict is put in the position of a person making an unjustified claim, which should outweigh any justification for this claim she can provide.

### **The Significance of the Grey Zone for the Problem of Rule-Following in Social Sciences**

Of course, the problem of rule-following is not new to social sciences. To the extent that all fundamental sociological categories can be reduced to the category of “rule”, one can argue that the problem of rule-following constitutes the main problem of sociology. It is possible to show that, for example, the notions of “role”, “value”, “group”, “solidarity”, “status”, “gender”, and “inequality” refer to the rules to be followed by everyday actors. However, this point requires an extensive justification that cannot be provided here. If we address the problem of rule-following as a special issue within sociological theory, we can suggest that the existing answers to this question are not quite satisfactory when dealing with the phenomenon of the grey zone of rule-following. It requires a certain refocusing of the social sciences’ approach to the problem. The reasons are following.

As such, the problem of rule-following was formulated in the most concise and essential manner by Ludwig Wittgenstein in his *Philosophical Investigations*, where he points out that any pattern of actions can be brought into correspondence with any rule (2009: 87). For the social sciences, this is a paradox that needs to be resolved because, unlike all other sciences, the social sciences deal with behavior that is rule-governed or evaluated based on rules.<sup>3</sup> Social scientists (e.g., Peter Winch [2007], and David Bloor [1997]) who

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3. Weber’s well-known definition, postulating as a basic characteristic of social action an orientation toward another person (“... behaviour is ‘social’ action where the meaning intended by the actor or actors is related to the behaviour of others, and the action is so oriented” [2019: 79]), also essentially relies on the idea of rule, since orientation toward others implies an orientation not only toward directly present others, but also toward a wide range of absent others (“These ‘others’ can be individual and familiar, or indefinitely numerous and quite unfamiliar...” [Ibid.: 99]) who can present only in the form of rules: “... collective constructs... are ideas in the heads of real people... ideas in part about what exists, in part about what should exist, and ideas to which they *orient* their action” (Ibid.: 90). This does not mean, of course, that, for Weber, there can be no

took Wittgenstein's paradox literally tried to find a mechanism that ensures a correspondence between rule and action. From their point of view, which was called "skeptical" (Kripke, 1982), such a mechanism is social convention: the members of particular communities agree collectively on what conduct should be considered as following rules and not-following rules, and institutionalize these agreements.

However, the skeptical solution to the problem of rule-following faces an irresolvable logical difficulty related to the application of conventions. If we connect a rule to an action through a convention, how do we know when a convention is or is not applicable? If we need rules for applying the rules, then this regress would be endless. Two ways of overcoming this difficulty have been proposed in social sciences. The first (its proponents are G. P. Baker and P. M. S. Hacker [1986], Michael Lynch [1992], and Wes Sharrock [Sharrock, Button, 1999; Greiffenhagen, Sharrock, 2009], among others) is to remove the grounds for said difficulty altogether by showing that there is no gap between rule and rule-following that requires being filled with "social glue".<sup>4</sup> Rule and rule-following are one and the same. It is from rule-following behavior that we infer which rule an actor follows, not the other way around. The second way involves a complete redefinition of the rule-following problem, as D. Lawrence Wieder [1974] did, for example. It is proposed to consider the matter not in terms of the relationship between a rule and an action, but in terms of the functions performed by rule formulations in social situations. Rules are always given to us in the form of some formulations, and these formulations not only have a particular verbal character, but are also employed to achieve certain interactional goals, e.g., teaching, praising, or story-telling. In this case, the question of rule-following is posed as a question of conditions, practices, and consequences of formulating a rule. The action of following a rule is seen as an action that is produced and can be talked about in the context of its rulefulness.

All three outlined solutions to the problem of rule-following have shortcomings when applied to the phenomenon of the grey zone. The skeptical solution misses the phenomenon by introducing social conventions as an answer where, for actors, this is a question: they should simultaneously *follow* the rule and build a line of conduct *in relation* to it. "Social convention" is not what they are acting *by*, but what they are acting *toward*. An anti-skeptical solution introduces a binary approach to the rule-following: you inevitably either follow the rule, or do not follow it. As we have seen, grey-zone actions fall somewhere in-between these extremes. The "formulaic" solution (compatible with the anti-skeptical one and, to a great extent, an extension of it) narrows the focus of attention to

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differences in meaning that individuals give to their own and others' actions. He defines social relationship as a ". . . *chance* that action will be social in a (meaningfully) manifest sense . . ." (Ibid.: 103) and suggests that the content of social relationship ". . . can be quite various: conflict; enmity; sexual love; friendship; piety; market exchange; 'fulfilment,' 'evasion,' or 'breach' of an agreement; economic, erotic, or other forms of 'competition'; or communal relations based on social rank, nation, or class . . ." (Ibid.: 104).

4. As Sharrock and Dennis suggest, ". . . *nothing* is involved in conjoining the steps in a rule-following series beyond having learned the rule, for 'having learned the rule' is the same as having understood how to go on, how to make the connections between steps in a sequence, having — in other words — grasped what it is the rule tells one to do" (2008: 44).

the situations when rules become a topic of interaction. However, this is just one type of situation where rule-following is relevant. The existence of the grey zone shows that an ordinary actor can envisage and avoid the situations where formulations of rules have to be employed.

I think that the phenomenon of the grey zone requires considering the problem of rule-following from the perspective of *rule-orientation* exhibited by everyday actors. The notion of rule-oriented behavior is better suited for the purposes of analyzing phenomena related to pandemic rules because it allows the examining of not only situations where a rule is formulated, but also situations where people demonstrate a consideration of a rule in their actions. Rule-orientation does not imply that the actor follows the rule or does not follow it. Rather, it implies that an actor has to identify and demonstrate the possibility to explain her action as related to particular rule. The rule here is not a formulation or a template for action, but a resource for making things intelligible.

## Conclusion

The observations presented in this paper are only a first approximation to the problem of the grey zone of rule-following. The COVID-19 pandemic has shown that the grey zone plays a significant role in the mass adoption of new rules, and understanding of how it is ordered will provide answers to some questions about human conduct in such situations. It will also shed light on some characteristics of rule-following in a variety of everyday situations, not only in pandemic settings. The study of actions in the grey zone shows that rule-following is a *public* activity much clearer than the studies of rule-acceptance or rule-rejection. Although today the clashes between those who oppose pandemic rules and those who support them attract the main attention of observers and analysts, the “social work” most important for the future is accomplished in the grey zone where ordinary actors do not *take a stand* on the rules, but *adapt* to them and *tailor* them to themselves. The way this social work is done will determine the effectiveness of sanitary measures taken by the authorities.

The obvious shortcoming of observations in this paper is that they are overgeneralized. Further research on the topic should be conducted on a broader empirical basis, and should include a detailed description of the ways in which the organizational objects outlined in the paper are produced in the observable details of actions. Since acting in the grey zone is a continuous process involving a constant orientation to the emerging configuration of the details of current situation, it is necessary to investigate how ordinary actors monitor their own and others' actions and what procedures they use to do so. The situation of the pandemic forces all of us to re-learn how to live our daily lives. In doing so, we are relying on a huge array of ordinary competences that we have already learned. Of course, the pandemic did not radically alter existing societies and make the everyday world completely unfamiliar to us. Nonetheless, insofar as many important aspects of our routine are transformed (some permanently), we find ourselves engaged in a process of rule-making that is not predetermined by any single authority but involves the alignment

(and misalignment) of the efforts of many social actors. The study of grey-zone actions can provide insights into how everyday life in general, and pandemic everyday life in particular, is reconstituted.

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## COVID-19 и серая зона следования правилам

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В статье рассматривается феномен серой зоны следования правилам — действий, которые могут одновременно восприниматься как соответствующие какому-то правилу и как нарушающие это правило. Пандемия COVID-19 заставила обратить внимание на серую зону, поскольку значительная часть ответов на вводимые антиковидные меры заключается в неполном следовании новым правилам, типичным примером чего является опущенная маска, закрывающая только рот, но не нос. В статье утверждается, что действия в серой зоне, если рассматривать их как публичную деятельность, имеют специфическую пространственную и временную социальную организацию: они должны быть гибкими и ориентированными на возможность их завершения в случае необходимости. В то же время они производятся для того, чтобы быть наблюдаемо объяснимыми в качестве действий, соответствующих правилу, чтобы предотвратить приписывание актору нарушение правила. В статье также описываются некоторые свойства ситуаций, в которых действия в серой зоне вызывают напряжение, заставляя актора и других участников инициировать спор или конфликт. Основная идея статьи заключается в том, что совершение действий, относящихся к серой зоне следования правилам, не свидетельствует о несоблюдении актором правила. Лучше описывать действия в серой зоне как *ориентированные* на правила, а не как *следующие* или *не следующие* правилам. Это значит, что социологам следует отказаться от дихотомической логики при анализе следования правилам и уделять больше внимания практикам осмысления и упорядочивания правил, осуществляемым самими участниками.

*Ключевые слова:* COVID-19, пандемия, следование правилам, повседневные действия, публичная деятельность

# Extending of the Legal Order During Pandemic: The Russian Perspective\*

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The unprecedented measures of quarantine regulation have led philosophers and lawyers around the world to speak of the fragility of democratic freedoms and the return of the state of emergency as a political reality described in the writings of 20th century theorists. However, the imposed restrictions are considered in the works either in relation to the legal mechanism of their imposition, or through the prism of political philosophy. In addition, the Russian experience has not been sufficiently highlighted in the publications. This article attempts to synthesize legal analysis with political-legal philosophy in order to show that the extension of the legal order is always embedded in its logic. The first part of the article shows how what has been mentioned at the level of philosophical reflection and in relation to foreign legal orders that have been implemented in Russia, using the example of substantive legal practice. The second half of the text draws attention to the logic of protest which coincides with the logic of both the police and the state. Since the rights to which the protesters draw attention to have their source precisely in the existing legal order, both the actions of the law-enforcement authorities and the actions of the protesters are aimed at protecting it. The conclusion is that the danger of this situation is that the normative system could potentially replace social reality in the future.

*Keywords:* state of emergency, violence, law, legal-order, Walter Benjamin, pandemic

## Foreword

As many have already noticed, the world after COVID-19 will not be the same. Not only have we found ourselves in a fundamentally new ontological reality in which we are beginning to account for an increasing number of non-human actors, but our socio-legal and political reality has also undergone significant changes. The unprecedented measures of quarantine regulation have generated intense debate both among jurists on the mechanism of the implementation of these measures and their relationship to constitutional rights, as well as political theorists and philosophers.

Nevertheless, it is difficult to talk about the state's response to COVID without going to extremes, as some public intellectuals have done. Critics risk being branded as pandemic-denialists, and advocates of explicit measures become targets of accusations of etatism. Neither of these two positions seem right, and if we allow the use of psycho-

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analytic terms, they are both merely symptomatic manifestations of a structural problem that needs to be symbolized. I hope that the presentation of my view of the situation can avoid these two extremes.

To do this, we must first consider the triggers that caused this reaction, namely, the state's anti-COVID measures themselves. At this stage, there is no lack of conceptual grounding. There have been publications in which entire sections have been devoted to the socio-legal and legal dimension (Gephart, 2020). Meanwhile, the Russian experience has not yet been sufficiently highlighted precisely in terms of the interaction between political theory and law. There are either legal articles on the legal analysis of the imposed restrictions (Khramova, 2020; Varlamova, 2020), or sociological and philosophical works that look at the legal aspect from the perspective of the philosophy of law (Filippov, 2020). Clearly, this is due to disciplinary boundaries which are unavoidable. However, the conceptualization of a substantive legal practice, that is, the text of legislation and law enforcement, could squeeze the hegemony of lawyers inherent in the legal field.

The text of the law is an important element on the way to achieving this goal. The open texture of legal language that allows law to be interpreted when there is uncertainty at the borderline (Hart, 1994: 128) is also able to predetermine social reality. In a situation of uncertainty, the abstract wording and lack of understanding of the timing of the end of a disaster gives the law the power to decide when the necessary grounds for canceling the restrictions are in place, regardless of more-or-less objective facts. The legislator becomes a katechon to prevent the disruption of order, which is ensured by both the introduction of temporal measures and the tightening of the underlying legislation.

On the grounds of an analysis of the text of the constitutional court decision which legitimized and legalized the unconstitutional provision of the Governor of the Moscow region decree and the legislative innovations in the field of criminal law, I hope to show that violent police actions in clearing public spaces of mass crowds is a direct extension of the internal logic of the law.<sup>1</sup> Here, however, a distinction must be made between Russian and European practices. Until recently, Russia has not faced demonstrations against the introduction of QR, but after the decision to tighten measures in the field of COVID-19 and the introduction of bans on visiting public places without QR, we can observe protests with European-like slogans and even the disruption of administrative buildings' work (Nasulina, 2021; Novaya gazeta, 2021). These protests, both in Europe and Russia, are directly linked to the structure of the established legal order, as they aim to protect what the protesters consider to be fundamental rights. There seems to be a legal conflict in this case. However, there is no "conflict" as both sides are starting from a shared legal order, and are directing their actions towards preserving it. Of course, Russian protests have not reached the same level as in Europe, but a particular analysis of Russian legal practices that have led to events similar to those in Europe will reveal what these phenomena have in common in different parts of the world.

In the first part of the article I show, using the example of substantive legal practice, how what has already been mentioned at the level of philosophical reflection (Agamben,

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1. It is the *lex*, not the *ius*, the essence of which I will not venture to identify in this text.

2020) and in relation to foreign legal orders (Cormacain, Bar-Siman-Tov, 2020; Platon, 2020) has been implemented in Russia, namely, the implementation of a *de facto* state of emergency without its formal introduction and its consequences for both the political and legal spheres. In the second half of the text, I draw attention to the logic of protest which coincides with the logic of the police and the state. Since the rights to which the protesters draw attention have their source precisely in the existing legal order, I conclude that both the actions of the law enforcement authorities and the actions of the protesters are aimed at protecting it. The only difference is that the state is engaged in law-extending as well as law-preserving, which prevents it from recognizing the protesters as an ally.

### Russian Case-Law

Before examining the normative component at the national level, it is worth looking at publications and statements from the international community. At the outset of the coronavirus outbreak, UN experts, recognizing the gravity of the crisis, pointed out that states should not abuse the restrictions imposed by using them to target certain groups of citizens, including human rights defenders (UN Experts, 2020). In further examining state reactions to the spread of COVID-19, it has been noted that the European Court will be called upon to recognize states' discretion in combating the coronavirus (Tzevelekos, 2020). Concerns can be seen that the measures introduced have led to various human-rights violations. In Russia, the right to a fair trial has been restricted, which, for example, is expressed in violation of the principle of publicity when conducting court sessions via videoconference. Courts have stopped allowing spectators and journalists, and recordings of video broadcasts are not made available to the public (Startceva, 2020). It should be mentioned that the European Convention on Human Rights allows for derogation in the event of war or other public emergency threatening the life of the nation. Each member state must inform the Secretary General of the Council of Europe when such measures are introduced.

The Russian Federation has not been known to introduce a state of emergency, but has used a regime of heightened readiness when an emergency situation threatens it. Although one of the conditions for the introduction of an emergency regime is the number of deaths over 50 people, the emergency regime was not introduced. As some observers have noted, there is no substantive difference between the emergency preparedness and emergency regimes:

Thus, Article 4.1(10) of the Federal Law on Protection against Emergencies sets out the measures which the authorities may apply in conditions of an emergency without distinguishing between the two regimes. Paragraph 28 of the Provisions on the Unified State System for the Prevention and Elimination of Emergency Situations specifies the measures to be applied under the high alert regime and the emergency regime in different subparagraphs "b" and "c", but is abstract and does not allow for a meaningful distinction between the two regimes. (Merkulenko, 2021: 92)

It also emphasizes the vagueness of the formulation of the objectives pursued by the restrictions (Khramova, 2020: 44). This leads to the inconsistency of the measures introduced with the principle of proportionality, according to which emergency measures should be dictated by the needs of the situation (Sajó, Uitz, 2017: 429).

It should be noted that the emergency regime and the state of emergency are two different regimes which, however, have no substantive difference other than the mechanism by which they are introduced. It is pointed out “that a regime of emergency (and hence a regime of high alert) may substitute for a state of emergency where it may be advantageous to the executive power in order to avoid the complicated procedure of an appeal to the Federation Council by the President of the Russian Federation” (Merkulenko, 2021: 95). The establishment of a formal state of emergency regime is supported by the limitation of such a provision to a certain period, which is a guarantee that exceptional powers will not be retained once the emergency has passed. Furthermore, the formal declaration of a state of emergency contributes to an awareness of the gravity of the situation and mobilizes society to overcome it (Varlamova, 2020: 21). If a state of high alert is considered in the logic of the law, it is one that responds to an extraordinary situation requiring special measures, but which is not serious enough to constitute a state of emergency (Khramova, 2020: 40).

Like the terrorist threat, COVID-19 threatens the good of the entire population and, therefore, the counter-terrorist state is quite comparable to the counter-COVID state, which also operates as a preventive state, where the state acts ‘as preventer of crime and disorder generally’ (Sajó, Uitz, 2017: 440). As Sajó and Uitz write: “After all, government is about public safety and security and in many welfare states, especially in Europe, public opinion expects government to guarantee social security on a preventive basis” (Ibid.). Laws enacted preventively or after the fact give the illusion of collective control, which is mostly absent (Roach, 2004: 185). Nonetheless, these preventive, life-preserving actions are triggered by extraordinary situations that end up turning the “social reality — law” pair upside-down, where the latter acquires the capacity to determine the former.

Schmitt, in his work “Legality and Legitimacy”, distinguished three types of states: the parliamentary legislative state, the jurisdiction state, and the administrative state. Despite the proposed classification, the German thinker writes that each type of state has elements of the others, but it is always possible to identify the centre of gravity (Schmitt, 2004a: 3–6). While it would seem that the parliamentary legislative state has prevailed in the modern world, the events of September 11 (following which the doctrine of the preventive state was developed) rather brought all three types together in a common fiction. In the normal course of life, the parliamentary legislative state functions on the people’s belief in the coincidence of right and law, but in times of nationwide threat, the legislative state transforms itself into an administrative state and starts to act on the basis of reality and the concrete situation (6,21).

A clear example of this was the single judgment by The Constitutional Court of the Russian Federation of 25 December 2020, titled N 49-P, concerning measures to counter the spread of a new coronavirus infection. The Constitutional Court pointed out the legal-

ity of restrictions on the movement of citizens imposed by the Governor of the Moscow region.<sup>2</sup> The problem was that these measures were introduced on March 29, 2020, but it was not until April 1, 2020, that the authorities of the federal subjects were empowered to establish rules of conduct mandatory for citizens and organizations when introducing a regime of high alert or an emergency situation. That is, the rule was unconstitutional for three days (Merkulenko, 2021: 100). Thus, the imposition of restrictions was dictated not by a higher order by which the norm could be conditioned (Kelsen, 2008: 84), but by an objective necessity (Schmitt, 2004a: 8–9).

The Constitutional Court of the Russian Federation stated that “In the current extraordinary situation, the Governor of the Moscow Region, as the highest official of state power of the subject of the Russian Federation (this applies to most regions), in fact, implemented an operative (anticipatory) legal regulation, subsequently (after a short period) legitimised by legal acts of the federal level, which in itself cannot be regarded as contradicting the provisions of the Constitution of the Russian Federation”. Since the modern state is not a pure administrative state, it has had to turn to the jurisdiction state in order to legitimize and legalize these measures in the eyes of the public. The boundaries of the legal order are extended in a situation where there is a lack of understanding of what is going on, and by introducing norms in response to dangerous events in order to further prevent them. However, the concepts of “public safety” and “necessary measures” can only be applied in a specific situation where the application of these concepts is crucial (Schmitt, 2004a: 32).

Such events illustrate a situation of concrete application of the law where a lower public authority in the hierarchy imposes a higher rule in defiance of a higher authority (55). In its ruling, the Constitutional Court explicitly states that the action of restricting movement is not unconstitutional because it is a reaction to an extraordinary situation. Having manifested itself for the first time, this situation requires a legal response, triggering the temporary legal regulation measures outlined above. However, the unpredictability of life forces the legal system to use a language that is open to evolutionary interpretation, to use the language of the European Court of Human Rights (*Tyrer v. United Kingdom*, no. 5856/72, ECHR 1978), that is to say, as interpreted in the light of present-day conditions. This inner dialectic of the law, where formality and clarity collide with openness and abstractness, is relieved by the release of the ability to define future reality normatively in a situation of emergency.

The very possibility of an unclear situation is constructed by the legislator through the abstract wording of restrictions and executive action in an extraordinary situation. Benjamin wrote that the ability to express abstractions is a result of the sinfulness of man. The Tree of Knowledge in the Garden of Eden did not provide information about good and evil, but symbolized judgment on the questioner (Benjamin, 1996a: 72). Legal language, insofar as *Justicia* speaks in it, is meant to express such abstractions as good, evil, and justice as the highest abstraction. Since we do not know what it will take to preserve

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2. The same restrictions were invented by the Mayor of Moscow Decree No. 12-UM of 5 March 2020.

safety, we will not create a concrete and exhaustive list of extraordinary limitations. This, it seems, is the dialectic of the concrete situation and the abstract law which resolves the crisis point of expanding legal order. A situation of ambiguity in this way is always potential and threatening; to overcome it, the substantive law is changed in a way that it could not have been changed in the normal course of life.

The absence of a formalized state of emergency can encourage the continuation of some measures through their incorporation into main legislation and tacit acceptance (Varlamova, 2020: 25). This, along with the impossibility of defining when the pandemic will end, is what is most dangerous. Provisions in the Russian Federation's criminal legislation were introduced to impose liability for violations of health and epidemiological regulations or for disseminating false information about the virus and its control. Such measures have been the subject of concern from international law scholars who point to their repressive potential (Seyhan, 2020). It has been noted that they are only indirectly related to the protection of public health and open to abuse (Khramova, 2020: 48). These rules are no longer extraordinary, but are aimed at empowering the legal order. Such a condition outweighs the risks associated with an officially declared state of emergency (Greene, 2020: 5). Although extraordinary circumstances were a condition for the adoption of these rules, in the future, it will be possible to determine whether the situation is favorable or not through these provisions, rather than objective facts.

The consideration of how the legal order is extended at the level of the legislative text allows us to move to the level of the analysis of practices which, on the one hand, put the prescriptions of the law, namely police and administrative practices, into social reality. On the other hand, there are practices that prevent this, i.e., the actions of protesters against the imposed restrictions. This will allow to distinguish between the law-preserving and law-extending violence of the state and the purely law-preserving violence of protesters.

### **Law-Making of the Pandemic Period**

Walter Benjamin saw a peace agreement which established a new law as a result of military violence (1996b: 240). Today, when many scholars talk about the blurring of boundaries between a state of war and peace due to the emergence of new military technologies (Gusterson, 2016: 147), it is impossible to trace at what point a different law order is established. This logic may be extended to internal state borders. The global character of the threat allows us to speak of a "COVID war" both on the level of mass media (Kostyuchenko, Kozyrev, 2020; Interlandi, 2021) and in the context of legislative measures (Umnova-Konyukhova, Kostyleva, 2021: 110) for population protection. Of course, this war aims to destroy the enemy and does not imply any peace agreement. Although such a metaphor is justly criticized (Gauchet, 2020; Panzeri, Di Paola, Domaneschi, 2021), we accept it insofar as it reflects the impossibility of defining the boundaries of normal and extraordinary life in today's situation. However, in this state of volatility, unpredictability, and uncertainty, the law-making reveals itself in a different way.

The German philosopher distinguished between divine and mythical violence. The latter, in turn, was divided into law-making and law-preserving violence. While the former defines the objectives of a legal character for itself, the latter is limited in this possibility (Benjamin, 1996b: 242–243). The state authority in the activity of which this distinction rubbed off was, for Benjamin, the police. It extends the boundaries of the legal order for security reasons when there is a lack of clarity (Ibid.). It is because the police extend the boundaries of the order but do not create a new one; in the gap between creating and maintaining order, I distinguish the law-extending violence. This is most vividly illustrated in law enforcement activities. From police batons to electroshocks and with each new mass gathering of citizens, the police asserted a new practice of maintaining order by their actions in a situation where they were fighting the spread of a new coronavirus infection. The remedy becomes the norm after it has been tried for the first time. Such actions are justified not only by the internal logic of the police force, but also by the state of emergency situation. Of course, the emergency situation does not permit the use of violence, but the actions of the protesters are seen as an encroachment on the welfare of the rest of the population. Protesters are thus excluded from political unity and designated as enemies in this war.

Agamben asserted that the camp as a space of the inability to decide where is reality and where is law, where is the norm and where is its application, and where is the exception and where is the rule, is the matrix of current politics today (1998: 173–174). In the camp, people do not understand the space they are in because they do not know the limits of their actions or those of the authorities and their limitations. A state of emergency in turn places the individual in front of the official fact of the restriction of freedom, allowing the subject to become aware of the reality of concentration. The state of emergency removes the subject from the sphere of legal certainty, but in doing so, it indicates that this certainty has never existed. With such an exclusion, the subject loses certainty in the outside world, but becomes certain only of an existing or potential limitation of their rights. This opens a window for political action. Protests against the restriction of fundamental rights in connection with the imposition of measures and states of emergency in a number of European states are an example of this.

### **Anti-COVID Protests as Law-Preserving Violence**

Until recently, the vaccination policy implemented by the Russian authorities did not meet with active resistance from some groups of the population, but the issue of introducing mandatory QR codes in public places remained only a matter of time. It was this event that created a rift on a legal basis. The official fact of restricting rights informed people that they were subjects of law, which before, for various reasons, they might not have realized. Awareness of oneself as a subject of law made it possible to defend the law. There are protests emerging in Russia against the introduction of QR codes (Malysheva, 2021) that have not yet reached the level of European demonstrations. However, they have similarities at their base that provide an opportunity for their reflection through a

common theoretical framework. Of course, the protests vary from country to country. Most researchers tend to think that anti-quarantine protests have a lot of support from right-wing and authoritarian groups (Seiler, 2021; Opratko et al., 2021). I will not examine the demonstrations from the perspective of the political-ideological views of their participants, but I will try to show that, in their essence, these anti-quarantine protests aim to protect the legal order as an ideological structure as they prevent attacks on the rights that underpin it. This does not give us a basis for analyzing their mass or regularity, but allows us to identify the cause of their occurrence.

What rights do the demonstrators stand for? They could be called general liberty rights. The kind of rights that, as Schmitt notes, stand above every organizational and substantive law regulations (2004a: 57). These rights are the freedom of movement, and the freedom of speech of someone who speaks of freedom of body control in relation to a vaccination. However, having originated in the socio-legal order and having been given legislative expression as a result of divine law-making revolutionary violence, these rights are firmly embedded in the legal order. It is true that the socio-legal order moves the rules like pieces on a game-board (Schmitt, 2004b: 57), but it does so on a juridical board. If real law is constituted as a unity between the socio-legal order and the legal order (Antonov, 2013: 171), these rights can be enforced in the modern state as long as the belief that the decision of the parliamentary majority coincides with the will of the people is maintained (Schmitt, 2004a: 24).

The paradox here is that in asserting their fundamental rights, the demonstrators are acting with the same logic as the state. While the preventive counter-COVID-state exercises rather law-extending violence in order to expand opportunities of legal order and maintain order and security through the police and restrictive measures, the protesters are advocating the maintenance of the order of their fundamental rights. However, they cannot conceive of these rights without their guarantee by the state, and therefore also exercise law-preserving violence.

Why, then, are demonstrations forbidden and protesters met with such fierce resistance from the police, if we are not proceeding only from the logic of preserving life?<sup>3</sup> The answer, in my view, is that the state is simply unable to define legitimate forms of violence accurately because it is *de facto* forced to recognize the subversive violence it opposes (Honneth, 2009: 114). The state simply cannot distinguish the divine violence that is capable of destroying the existing order, and therefore has to resist any violence that does not come from those who are authorized to do so. Even in the face of the law-preserving violence of demonstrators who, as we have seen, are not at all for the destruction of the existing order but precisely for the preservation of what is already there, the state continues to assert its monopoly. This, however, leads to a weakening of the original law-making violence, and hence of the foundations of the legal order that has forgotten that it itself is the result of such violence (McLaverly-Robinson, 2013).

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3. The exceptions are those countries where demonstrations are more or less peaceful. In these countries, the distinction can be discerned.

The boundary between the original divine law-making violence and the mythical violence is precarious, and the transition from one to the other, as Žižek shows, quoting Danton, is imperceptible (2008: 201). For this reason, the weakening of the existing legal order hastens its collapse, bringing the coming of the new order closer. The action of suppressing protesters is comparable to that of a masochist. The masochist's torment is the expression of a demand for excessive and unfulfilling love. The masochist does not just demand, but forces love upon themselves. The greater their anxiety, the more they force their partners to love them (Reich, 1980: 244–245). The brutal violent methods of the police are exactly this compulsion to love the established order, asking “We have given you security, why do you refuse to love us?” With each law-extending practice, the demands for love grow stronger, for acts of defiance are in direct correlation with the masochist's anxiety and displeasure.

However, the order itself is an object of desire because social and political interaction takes place within it. However, it is impossible to get out of this perverse relationship with the masochistic order until the fact of the necessity of faith is realized. It was clear to Robespierre that without faith, there can be no true revolution (Žižek, 2008: 202–203), and thus there can be no divine violence that breaks the perverse relationship. If the transition from divine violence to mythological violence is elusive, then Pascal's arbitrariness in the basis of law must be understood as an arbitrariness which began with ‘faith in an idea.’ This ‘faith in something,’ though, after a successful act of pure violence, is replaced by the pragmatics of a mythical (police) violence of a law-making and law-preserving nature. The “faith in something” gives way to a goal, but it does not disappear completely, only shifting into the realm of the unconscious, or an ideological structuring of the symbolic order. Thus, “faith in something” other than the operative order lies outside the law and, at the same time, is at its foundation. Forgetting this, therefore, law-preserving and law-extending violence brings the destruction of the order closer because its original illegality is revealed. As Pascal wrote, “We must not see the fact of usurpation; law was once introduced without reason, and has become reasonable. We must make it regarded as authoritative, eternal, and conceal its origin, if we do not wish that it should soon come to an end” (1910: 105).

The problem with the forceful suppression of anti-quarantine rallies is that by making opponents of COVID-restrictions the enemy, the legal order labels the inoculated and rule-compliant as its allies. Herein lies the thin thread that links the legal practice of restrictions and legislative innovations to law-extending violence. By recognizing the need for vaccination, one group of people thereby legitimizes the actions of the state to increase restrictions and penalties for COVID-dissidents. One can disagree with the methods used to achieve the goal, but as long as the threat is legally enshrined, these critical voices will be drowned out by volleys of the struggle for public safety.

## Conclusion: Some Reflections on the Politics of the Pandemic

Peter Wagner expressed the idea that lockdown was a surprise that returned the social imagination and created a temporary world with utopias and dystopias (2020). Utopias are defined as those states that provided broad social support, and dystopias are those countries where authoritarian governments used the situation to consolidate their power. So far, it is difficult to say where Russia stands. Certainly, the tightening of criminal and temporary anti-COVID legislation suggests that we are closer to the second scenario. However, this may, for the moment, be justified by objective necessity or by a specific situation. The fear is that the lack of clearly-defined legal criteria for defining such a situation can lead to the artificial creation of such conditions by a normative system where legal qualification would precede the event. This is not a false consciousness on the law-enforcer, but an essential feature of the law.

The limits of this process can only be seen in the future; in a pandemic, the expansion to which the legal order aspires at the same time as its preservation will be increasingly confronted by conservative forces (not in the sense of political ideology) that seek to preserve the legal order in its *status quo*. Regardless of the political-ideological views of the protesters, any protest against the violation of rights has its origins in the existing legal order, and has, as its effect, the fundamentals of that legal order. By moving away from the 'faith' that underpins it, the legal order is bringing its disintegration closer.

Despite the seeming impossibility of implementing politics in such circumstances, COVID-19 brought back the possibility of the political, but in its most negative form. Politics in the sense of distinguishing between friend and enemy (Schmitt, 2007: 26) returns through restrictive measures and the introduction of new criminal offenses. The inherent contradiction of a law that enhances the security of some and threatens to incriminate others (McLaverly-Robinson, 2013) is seen in measures to counteract coronavirus infection in the most intense form. Sustainable concepts such as 'quarantine' and 'quarantine measures' are introduced in relation to sick persons and persons who have violated public health legislation (Umnova-Konyukhova, Kostyleva: 115). The community of protected includes those who are vaccinated, and excludes those who may infringe on their well-being.

A process of exclusion and inclusion takes place in society in relation to the vaccinated/unvaccinated, those who believe in the COVID threat and those who do not, and those who agree with measures to eliminate it and those who do not. However, from a temporal perspective, these oppositions of Friend and Enemy, depending on your camp, are false. It is not a civil war that gives the very possibility of politics (Agamben, 2015: 22). Such a war requires a *πόλις*, but that has been lost due to extensive depoliticization. It is a war to destroy the Other as a phenomenon. The Other, however, does not necessarily have to be human. In fact, COVID could become this non-human Other. A shared sentiment in the face of a non-human threat could generate community (Weibel, 2005: 47), and the exclusion of the virus could sharpen the tensions between the state and society that have been building up over the years.

Although the pandemic situation is extraordinary, it has not led to extraordinary politics in the sense that Kalyvas understands it (2008: 6). In fact, all of its attempts were stopped. The high level of collective mobilization (demonstrations) as well as the widespread popular support for fundamental change (elections) have been dispersed and stolen. In this context, the UN Secretary General's call for a renewal of both the social and global contract (Guterres, 2020) sounds problematic. There is no telling when we will be able to leave the permanent state of high emergency preparedness which now seems to have become a new normal, not only nationally but also internationally. In order to leave this state, we must learn to distinguish between the boundaries of reality, law, and exception. Then, perhaps, the world can move closer to a new contract. Only one question remains: will it mark the establishment of a new legal order or a prolongation of the old one?

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## Расширение правопорядка в период пандемии: российская перспектива

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Беспрецедентные меры карантинного регулирования заставили философов и юристов всего мира говорить о хрупкости демократических свобод и возвращении чрезвычайного положения как политической реальности, описанной в трудах теоретиков XX века. Однако введенные ограничения рассматриваются в этих работах либо в связи с правовым механизмом их введения, либо через призму политической философии. Кроме того, российский опыт не получил достаточного освещения в публикациях. В данной статье предпринята попытка синтеза правового анализа с политико-правовой философией с целью показать, что расширение правового порядка всегда заложено в его логике. В первой части статьи на примере материально-правовой практики показывается, как то, о чем говорилось на уровне философской рефлексии и применительно к зарубежным правовым порядкам, было реализовано в России. Во второй половине текста обращается внимание на логику протеста, которая совпадает с логикой как полиции, так и государства. Поскольку права, на которые обращают внимание протестующие, имеют своим источником именно существующий правовой порядок, то и действия правоохранительных органов, и действия протестующих направлены на его защиту. Опасность такой ситуации заключается в том, что нормативная система в будущем может потенциально заменить социальную реальность.

*Ключевые слова:* чрезвычайное положение, насилие, право, правопорядок, Вальтер Беньямин, пандемия

# The Academicians on Quarantine: Reflexivity and Fragility of the Privileged Group at the Start of Pandemic\*

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The goal of this article is to analyze the challenges faced by social researchers during the first months of the pandemic of 2020 when work-life issues were problematized and academic routine changed. The article is based on a dataset of diaries in which researchers with an academic background in social sciences and humanities were fixing their everyday life and reflecting on its changes. We explore why academicians, a relatively privileged group due to their possibilities of safe remote-working and maintaining professional obligations during the period of lockdown, experienced strong moral emotions related to work. We argue that basic references of space and time lost their routine structure, hindered work productivity, and threatened the "proper", disciplined, and productive academic self. In their written narratives, participants of the project describe different emotional responses to this situation, with a focus on negative feelings including anxiety and guilt. The new reality was characterized by the layering of previously separated tasks at the same time and space boundaries, and therefore, in overload. At the same time, academicians were deprived of routine forms of face-to-face professional communications and networking. Academicians are oriented towards self-discipline and productivity, and self is produced via normative (self) evaluation and the juxtaposition with reference group(s). When the rules are changed, unstable, or constantly violated, it threatens the self. Moral emotions indicate this process until the new social order becomes inhabited and routinized.

*Keywords:* COVID-19, pandemic, emotions, academia, self, diaries, scholars

## Introduction

At the end of 2019 and the beginning of 2020, the world faced an unprecedented global challenge of the pandemic caused by the SARS-CoV-2 virus. At that time, different pre-

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ventive measures such as lockdowns and restrictions were introduced around the world. The pandemic has led to various social consequences, and has provoked many challenges for different countries, institutions, social and professional groups, and individuals. The COVID-driven economic and vital risks, although having increased everywhere, have been unevenly distributed between and within societies. While some professional groups appeared to be at the frontlines working at indispensable positions in the medical, service, industrial and transport sectors, many others found themselves in new, precarious positions (e.g., remaining unemployed), while a few found themselves in relatively safe spaces with newly opened opportunities for business (for example, Risi et al., 2020; Baltic Rim Economies. 2021. № 3: A special issue on COVID-19<sup>1</sup>).

Extensive research has already been done focusing on the groups that are associated with the most apparent forms of vulnerabilities during the pandemic; especially physical (the ones unable to stay in safe conditions or from groups at risk) and financial (the ones who lost their sources of income). These are medical providers, women (e.g., the ones experiencing domestic violence or working mothers whose care duties incrementally increased), self-employed people, the elderly, etc. (see Crook, 2020; Minello et al., 2021; Kınıkoğlu, Can, 2021). The roles of class, age, and gender in the ways people were experiencing them during the times of isolation became vivid in many aspects.

Here, we are interested in a group of Russian-speaking academicians, and would like to explain how and why this privileged group that could stay in safe spaces at home and maintain their professional obligations during the COVID-19 outbreak experienced strong moral emotions related to their profession and felt vulnerable during the first months of the pandemic year 2020.

In Russia, the massive discourse about the local manifestations of COVID-19 started in early March, 2020, soon after centralized measures of regulation were introduced. Vladimir Putin's presidential appeal to the citizens of Russia on the 25th of March, 2020, (President of Russia, 2020) became the official start of the self-isolation regime, which was unofficially called and appreciated by the citizens as "long holidays" (28 March — 5 April). It presupposed that many institutions had to provide paid days off for their workers. The universities, kindergartens and schools, many shops, and cultural and entertainment institutions were closed or (if possible) had to switch to an online format. After that, the non-working days were prolonged to 30 April. The first month of the pandemic was characterized by disappointment, that is, the quick release from the coronavirus appeared to be indistinguishable (Osłon, 2021: 67). Since then, the measures and rules of protection and prophylactics have been constantly changing by becoming stricter or looser, which made them look inconsistent and controversial.

In this article, we are interested in what happened to academic workers (professors, teachers, researchers, and PhD students): *what was their subjective experiences of work-life balance and academic routine under COVID-19?* We considered academic social science and humanities as a variation of creative, mobile, relatively autonomous professions

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1. <https://sites.utu.fi/bre/baltic-rim-economies-3-2021/>

with relatively high prestige, with a flexible organization of space and time, and with some certain criteria of activities and results (publications, teaching, research, conferences' participation, and media activities). When their work was brought online, academicians faced various challenges, including the ones many other middle class remote workers also faced.

Studies of remote work during the pandemic show strongly-negative emotional responses to isolation, to the challenges related to a work-life balance, to the increase in domestic violence, to a work overload or, the opposite, to a lack of work, numerous technical challenges, and negative effects on mental and physical health (review of research in Tahir, 2021). Distance-workers lost the ability to maintain their professional sociability on a daily basis in face-to-face interactions (the summary can be found in Reuschke, 2021). However, the process is ambivalent. Distance work also produce benefits such as the possibilities for obtaining new skills, a flexibility in work, an increase in using technology, saving time, and better control (Tahir, 2021). According to research of distant work in the UK in 2020 when the number of remote workers increased radically, especially among the youngest and more educated professionals, "many workers have got used to and may even have experienced the benefits of working at home. In addition, productivity has not been adversely affected by the shift towards homeworking" (Reuschke, 2021).

However, each professional group of remote workers has its own peculiarities. In particular, the positioning of academic workers during the pandemic is confusing since they could (and managed to) work remotely, fulfilling their professional obligations along with keeping (to more or less extent) their income, but, according to our data, they (we)<sup>2</sup> felt predominantly insecure, vulnerable, and frustrated. The same results are shown by other studies: in the USA, the faculty expresses feelings of being "overwhelmed", "frustrated" and "stressed" while taking responsibility for on-line classes (Bidwell et al, 2021: 39–40). According to a Russian survey, 61% of all remote workers (19% of which are the ones working in education) disliked this format, 47% claimed that the content and organization of their work changed, 37% noted that their work had worsened, and 22% reported working more than 9 hours per day (i.e., overworking) (Oslon, 2021: 104–105).

In order to explain this, we will demonstrate how a "proper" academic life-work balance and a "proper" academic professional are framed by routine spatial, temporal, and communicative referents which were challenged during the corona crisis. We will not go deeper into discussion on the precarization of researchers under the neo-liberalization of academia as our focus is on the special context of the COVID-19 lockdown and distance work.

For our explanation, the following categories are important: "reflexive self" (which we use interrelatedly with the terms "self", "subjectivity", or "subjective experiences"), "narrativization", and "emotions". We use the category "self" while exploring how the "academic self" was challenged by rapid social changes and required to be reevaluated in interactions (Goffman, 1990). We argue that self is *reflexive*, intersubjective, and dynam-

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2. As we were among the authors of diaries, we intentionally use both "they" and "we" when we speak about participants of the project in this text.

cally shaped by social, economic, and political processes (see more on reflexive self at Adams, 2003). COVID-19 appears to be the exterior factor that launches the process of re-considering the self of social scholars. This becomes evident through the process of the narrativization of self-reflections and concurrent emotions of social scholars during the first wave of coronavirus in Russia. In this article, we do not discuss the long-term consequences of the coronavirus pandemic for the self of social scholars (which is a subject for further investigation), but rather argue that the professional self is a matter of ongoing reflections which can be triggered by changing patterns of everyday life (time and space in particular). As Anthony Giddens puts it,

The reflexivity of modern social life consists in the fact that social practices are constantly examined and reformed in the light of incoming information about those very practices, thus constitutively altering their character. We should be clear about the nature of this phenomenon. All forms of social life are partly constituted by actors' knowledge of them. Knowing "how to go on" in Wittgenstein's sense is intrinsic to the conventions which are drawn upon and reproduced by human activity. (1990: 38)

Difficulties with routine practices, as we will show further, provoke the narrativization of self (Giddens, 1991) of some scholars. The rupture of human narratives during the coronavirus pandemic led to the losing of grace, appeal, and interest (Fernandez, 2021). Metaphorically speaking, narratives in first months of corona times are, to some extent, similar to the production of "therapeutic" narratives by chronically ill persons who try to get back one's subjectivity (Frank, 1995), or in terms of therapeutic culture (Illouz, 2007; Lerner, 2015); academic workers produce self, especially under the rupture of frame of references, through emotional language, even if it is supposed that the "ideal academic" is an "unembodied worker" (Utoft, 2020), that is, one without emotions.

In this article, our logic is as follows; we will describe the diary project and the collected data; after this, we will turn to the results of our empirical research and explore the temporal and spatial changes of basic social references of the everyday and the professional life of academic workers. We will show how and why strong moral emotions, such as *anxiety*, *guilt*, and *shame*, accompany this process. After this, we will turn to exploring the ongoing reflexive processes with our professional selves during this time, and related coping strategies.

## Data and Method: The Diaries of the Researchers

This project "Virus Diaries: Chronicles of Everyday Life" (moderated by Anna Temkina and Daria Litvina) started in March, 2020, and continued up to June, 2020; an additional 5th wave was conducted in September, 2020, to get the update on the reflections and situations. Therefore, we gathered data in five "waves".<sup>3</sup>

3. Start: (10)25 March; the 1st wave — up to 5 April; the 2nd wave — up to 21 April; the 3rd wave — up to 12 May; the 4th wave — up to 10 June; and the 5th wave — up to 30 September.

There was a total of 34 scholars (the authors included) from ten countries who participated in the project. Most of the participants live in Russia (Saint-Petersburg or Moscow), others wrote from Australia, Azerbaijan, Armenia, Georgia, Germany, France, Finland, Sweden, and the USA. All participants are Russian-speaking (a few are bilingual) researchers from such academic fields as sociology (the majority), philosophy, philology, anthropology, political studies, history, and oriental studies. There are 8 men and 26 women of different age groups (aged 23–67) and professional statuses, from PhD students to professors. Most of the participants are living in nuclear families without children ( $n = 16$ ), the rest live with children ( $n = 5$ ), in extended families ( $n = 6$ ), in individual households ( $n = 6$ ), or with friends ( $n = 1$ ). During the project, all of the participants were in self-isolation (to a different extent) and worked remotely from home. They tried to follow the safety rules as proposed by experts or designed by themselves, and rarely violated them.

Participants were recruited among those researchers whom the authors of this article know personally, and therefore belong to a networking academic community. We also refer to this community as middle-class remote workers; therefore, results of this study could be expanded to some extent and compared to other professional groups of such status.

Participants were suggested to write a diary in free form (which they did), although the following topics were recommended to cover: coping with risks and safety; behavior and interactions of people in a city/public places and institutions; the reorganization of professional and everyday lives; the transformations of personal/family/intimate relationships; communications with friends; emotions; and, finally, discourses and politics. The genre of the texts *de facto* represents both personal reflections and research observations.

This project resulted in a database of records on pandemic daily routines which was available for all of the participants who shared their diaries with the rest of the group.<sup>4</sup> Participants were informed about the academic purposes of the project and the ethical rules of using the data (a written confirmation via e-mail was required). The data was available to all participants who intend to use it for academic purposes.

The idea of the project emerged in the early spring of 2020 when we noticed an increasing narrativization of current changes and subjective experiences. People around us (including ourselves) started to write diaries, make online publications, and created numerous chats in social media in order to fix the new social reality and, at the same time, to cope with its' instability and challenges. The quick overview and consultation with colleagues abroad showed that there was an international rise in number of projects related to pandemic experiences, such as oral history projects, various collections of diaries, and other narrated evidences.

Therefore, we decided to make a closed call and invite a circle of our trustworthy academic acquaintances to write diaries. Most of our colleagues enthusiastically agreed to participate in this project, as some of them had already been writing diaries or making

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4. The project already has two publications: on (mis)trust (Tartakovskaya, 2021), and on social inaction (Holavin, 2020).

notes, while some others told us that they were just about to write down their experiences. For many of them, writing diaries constitutes a kind of research and/or coping strategy. They evaluated our proposal positively and continued their writing with a purpose, as researchers:

[This diary] is “on the occasion”, due to the circumstances. There is a virus, there is isolation, and being in isolation is very difficult. I began to write something down just to remember the days . . . I am constantly reading and writing this diary as a researcher as well . . . I am thinking about the things in my current life a researcher may be interested in . . . This is an interesting reflective work. I am glad it happens. (Svetlana<sup>5</sup>, April 2020)

This diary is very useful. I will continue to take notes. It is very disciplining, especially if the task is thematized.

(Nina, June 2020)

We realize that our project has potential biases that we need to list. First, we recruited those who belonged to a certain social circle (although not necessarily acquainted with each other), and therefore had a good chance of having similar “academic selves”. Second, the process of writing diaries is a time-consuming practice that could be accomplished only by those who were reflexive and sensitive to the ongoing changes, to the extent that they were ready to share their experience with community members.

Despite the limitations mentioned, we fixed a social phenomenon that was evident worldwide, that is, a rise of narrativization of subjective experiences (the self) triggered by rapidly-changing everyday life patterns and accompanied by strong moral emotions. The process obviously touched a huge section of our professional community, though we have no instrument to count the numbers. Therefore, we seek to address the *mechanics* of the process rather than its *prevalence*.

## The Changing Temporal and Spatial Dimensions of Pandemic Work and Life

For academic professionals (including those participants from countries with different principles and timing of lockdowns), the short and long-lasting effects of the pandemic were associated with remote teaching, restrictions of academic mobility (international conferences, fellowships, etc.), the unavailability of full-scale ethnographic work, the lack or absence of offline intellectual events (seminars, book presentations, debates, etc.), and changes in their daily relations with colleagues, students, and administration.

The majority of the participants narrated how difficult it was to start working or studying in new remote conditions; their productivity declined, causing emotional responses, feelings of anxiety, shame, and guilt. In rare cases, participants said that not much changed in their lives: they kept on working, reading, writing, teaching, and conducting research as before. Moreover, a few participants welcomed the new possibilities,

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5. In this text names of all participants were changed into pseudonyms.

e.g., the increase in online communication which allowed them to easily contact international colleagues, or saving time which they had to spend on going to meetings. One participant wrote that

For me, however, quarantine is a kind of relief: as least I do not feel guilt of not attending this or that exhibition, seminar, or party.

(Kristina, April 2020)

Nevertheless, even those who were fine with remote working reported physical and emotional discomfort related to the changing patterns of their everyday routine as predetermined by spatial and temporal coordinates; their routines had to be reconsidered. In this section, we will explore how temporal and spatial coordinates of everyday and professional life were presented in diaries. We will show how they lost their structural capacities, problematized academic practices and the “academic self”, and caused intensive emotional response in many participants (which we address in more detail in the next section).

### *Work-Life Balance Problematized*

Spatial and temporal references appear to be the carcass of everyday life. These referents routinely, invisibly, and non-reflexively organize our professional life and other activities. It is important that “a shared everyday life has to be synchronized by way of temporal orderings and choreographies, and by juggling *competing activities* throughout the day (e.g., work-life balance)” (Damsholt, 2020: 140).

During corona, crisis planning of time and the “synchronization” of time and space between actors became highly problematic. Competing activities emerged in the spheres in which they did not simultaneously exist previously. In the situation of multi-dimensionality, tasks (both working and caring) could be appointed to the same time, with no obvious priority of one over another. The working rhythm was intensified, but housework was intensified as well. Participants describe their struggle when the kindergartens and schools were closed, children and other family members remained home, online teaching combined with online meetings and ethnographies. Everything was happening in the same space and at the same time.

The volume of housework and care increased, and the delegation of these duties to outsourcing became unsafe and uneasy. Care is described by researchers as a problematic issue during the worldwide corona crisis (see, for example, Fodor et al., 2020; Hjalmsdóttir, Bjarnadóttir, 2020). Caring for children (including the organization of their teaching and entertaining), cooking, and cleaning constituted new competing activities for the participants in the assemblage of multiple concurrent tasks, both professional and caring. Special efforts were made to cope with them, but nevertheless, the process did not become more controlled. As one participant describes her attempt to rule her and her family’s time:

I made a schedule, taking into account all the things that were necessary and useful from my point of view: classes with [daughter] (20 minutes of reading in Russian and 15 minutes of reading in [another language], as the school orders), cooking, time for dressing the children and their management, walking, cleaning . . . It turned out that there were literally 2 hours left for my own tasks, and then they were split into one-hour intervals. Immediately, everything did not go according to plan: the children do not want to do anything and do not listen to me.

(Inga, March 2020)

Suddenly, we were blocked in our homes and had to systematically re-negotiate with family members and colleagues about work-life issues, which led to the intensification of communications and competition not only between activities, but also between partners or family members for personal and working time and space.

Participants faced the problems of role-balancing and multitasking, and the diaries are full of descriptions of caring and working without any boundary or break between them. Everything became scheduled at the same time and the same place, all day, around the clock:

During the second half of the day I was sitting with a child. She really needs my attention. I feel that I help her little, can't entertain her, can't fully participate in her games. I keep on thinking how to snatch time for work.

(Marina, May 2020)

I sat on the ottoman (my back, shoulders and legs are already very tired) to write a couple of working letters to better plan the work for the week. Between work issues I manage to change diapers for my son.

(Valeria, September 2020)

Household work intensified in families with kids, as it became necessary to constantly cook for the whole family, clean, and coordinate activities: "It seems that work has intensified in the remote mode as well, because there is an illusion that it is always convenient for everyone to do any work" (Valeria, March 2020). Competing activities desynchronize the routine of previously structured time and space, and influence time perception and work productivity.

### *Accelerated Time*

Researchers are supposed to have intensive but relatively flexible rhythms of professional life and reflexive independent selves and individual practices. The pandemic, paradoxically, sheds light on their dependence on the synchronization of time and space with other scholars. During lockdown, time doesn't follow a predefined schedule. We can observe a "temporalization of time" (Rosa, 2013), or "timeless time" (Castells, 1996). The time is subjectively experienced as a scarce resource which is difficult to control and allocate, and this was the main leitmotif of the diaries. The participants reported difficulties with

short- and long-term time management, lack of temporal organizational structure, and a different “speed” of time. They (we) spoke about

Timelessness, time dilation . . . Days merged into one big stream.

(Sofia, April 2020)

Time either erases or disappears, or there is just nothing to remember.

(Svetlana, May 2020)

I am catastrophically late with everything.

(Valeria, March 2020)

As a result, “extra time” that was “saved” on transportation to work and cancellations of offline events vanished along with optimistic plans on “long holidays”:

At the beginning of the quarantine, it seemed that now I’ll move mountains — I’ll finish my articles, I’ll progress with the book — but everything is going much slower. Some days have gone to waste.

(Victor, May 2020)

If previously we could orient ourselves on planning and performing one task at a time (not only within life-work balance, but also within professional tasks), now time had accelerated to the extent that we constantly have multiple competing tasks in several agendas.

The acceleration of time required different tools, among which were online chats and social media which helped to synchronize time in the “timeless” situation. Even before coronavirus, scholars have argued that the life rhythms of modern people have been accelerating, and “it becomes rational to organize daily life in a flexible way whereby particularly new mobile technologies can be used for the coordination and synchronization of action chains” (Rosa, 2013: 235). Instead of feeling that the schedule has become flexible and controllable with the help of technologies compensating for the lack of face-to-face communications in self-isolation, our interlocutors reported just the opposite; they were overburdened by constant online events, messaging and working 24/7, presenting papers at conferences at night (when these are working hours in another time zone), etc. Our participants write:

The coronavirus emergency and all social changes that it introduces actually increases the workload of people like us. The social activity online becomes extremely high. All real conferences were cancelled, but academics rush to organize even more online things. As a result, you cannot leave your work table; you do not even take breaks for travel to your workplace and back; you are just locked inside and chained to your laptop. “I am working 14 hours per day,” a colleague tells me in a private conversation.

(Kristina, April 2020)

The whole social life has moved online, which has increased my attachment to the phone, and it makes me feel like I'm being cornered.

(Valeria, March 2020)

Soon, immediate responses to incoming work tasks via online chats (Telegram, WhatsApp, Messenger, etc.) became the new professional demand, the idea of "working hours" became vague, and the privacy of communication (one can write only to those one personally knows well) faded away. Getting messages at any time of the day became a kind of norm, though associated with frustration and the need for additional negotiations. The new norms were generated in constant remote interactions:

I was able to return to the unfinished work questions only after my daughter fell asleep (23:10), and completed the slides < . . . > Then, I sent them to the common chat and received a message from one of my colleagues "Is it possible, if not difficult, to send non-urgent messages at an early/late time using the Send without sound < . . . > function?". On the one hand, it's embarrassing that he was (possibly) woken up or disturbed, although the message was not addressed to him, while on the other hand, I caught myself thinking that I expect everyone to be responsible for ensuring own digital comfort somehow by default, because they can change settings for notifications on their devices. This reaction turned out to be interesting and unexpected, because I myself am used to receiving messages at night, and it seems that in a pandemic, the probability and intensity of night correspondence has only increased.

(Valeria, June 2020)

The acceleration of time becomes evident even for the ones reporting that there was nothing new for them in the corona lifestyle (they were used to working remotely, had no little kids, and had rare social contacts outside their households). Now, they have to synchronize themselves with the common growing tempo and elaborate special strategy of coping with overburdening:

Solitude is my remedy. But now I feel attacked online. Everybody wants to organize something, to discuss, to reflect together on the current crisis; people compete in making statements and producing content. I have to find a way to reduce the noise. Hiding in a countryside is a good solution: you have to interrupt this work flood for some other practical activities; otherwise you won't survive.

(Kristina, April 2020)

During the corona times, the coordination of different activities becomes intensive and essential, but also becomes a source of additional burden and exhaustion. Additional challenges emerge for our participants: how to define the boundaries of personal and collective working time as well as individual and collective goals and priorities, while working on projects without a certain time and space schedule.

When time changes its tempo, it loses its direct connections with the horizons of the past and present, and cannot be synchronized with the reference group; our reflections

about the self intensify, as “our sense of *who we are* is virtually a function of our relationship to space, time, fellow human beings, and the objects of our environment (or to our action and experience)” (Rosa, 2013: 224). Metaphorically, we could say that we lost stable base for routine self production in an unstructured time with unstructured activities and multiple tasks, which arrive simultaneously from the private (home) and the public (work) domain. It becomes difficult to schedule our own tasks, and even harder to synchronize them with the academic community we correspond with. Therefore, we greet these changes with an emotional response.

Our narratives become full with reflections on different “objective” and “personal” temporalities, which do not match with each other; and this creates an existential sense of an *interrupted life*, a time for reconsidering our personality:

The greenery has blossomed. Feeling strange. As if this spring is not ours, as if it passes by, not for us, as if we have no right to notice it, because we are in quarantine . . . As if my life, human one, is almost completely at home, and everything that happens on the street, in nature, began to occur in different time dimensions.

(Irina, May 2020)

Time not only became accelerated, but also became condensed with the tasks that usually have to be performed in other places (which guaranteed that they do not overlap).

### *Merging Professional and Private Spaces*

The organization of time appears to be closely connected with space. The tasks that used to be associated with certain locations now become unanchored. They can accumulate into the same space and therefore, time. Writing, teaching, answering emails, carrying out interviews, cooking dinner, cleaning, washing, doing the laundry, Skyping, and caring for kids becomes a “here and now” issue, and one has to multi-task as never before:

While listening to the P. seminar, I brought some food, and on the way took the clothes out from the washing machine.

(Elena, April 2020)

We hardly work on the creation of spatial boundaries between our professional and private life, which are important for comfort and boundary of the academic self:

Today my partner moved his desk from the bathroom (yes, his desk was in a bathroom) to a small empty room . . . It turned out to be almost a real office. I tried to work at this table a little bit in the evening — it is much more comfortable . . . [In this room] it turns out to be like separating oneself from the “home”, to feel this border between “home” and “work”, the maintenance of which has become very important for me.

(Margarita, April 2020)

However, not all of our efforts led to results (even when the majority could finally organize extra space for maneuverings), as private space became inhabited with new “virtual” persons, which caused an impractical inconvenience and emotional disturbances. We also started to experience our family members’ presence at our “working places”, as we ourselves were interfering in the private spaces of our colleagues and interlocutors:

Together with another lecturer I conduct a lesson (online), at the same time I sit with my daughter, who climbs into the computer < . . . > At the end of the lesson, the daughter still draws attention to herself — when I tell the students something like “when we want to go and study power relations . . .”, the daughter sits nearby and loudly (and responsibly) says that you can’t go anywhere, because its quarantine.

(Marina, March 2020)

In the example above, Marina is located in different social spaces at the same time (the virtual private ones of her students and the other lecturer; and her own room with her daughter), simultaneously performing as a lecturer and as a mother. The home space (“first place”) appears to be the place that has to serve all of the functions that have previously been performed in “second” (workplace) and “third” (cafes, main streets, playgrounds, etc.) places (Oldenburg, 2000). Now, all these places merge with each other.

Habitual and recreational practices, such as “eating out”, walking with the children, or meeting with friends became reduced or unavailable, but happened with new coordinates:

On the balcony to our left, a woman (sometimes a man joins her, apparently her husband) continues to regularly walk her granddaughter. She still scrapes the concrete floor of the balcony with a small spatula designed for a sandbox, kicks a small ball, collects some plastic molds, also, apparently, intended for a sandbox. On other balconies, people read books, check their smartphones, hang up their laundry, just sit in the sun, walk from side to side, smoke, of course.

(Vadim, April 2020)

The confusing and conflicting overlays of activities, their accumulation in the same time and space requires new practices of time navigation, time balance, and special control. This navigation becomes an uneasy task as it requires constant re-negotiations with colleagues, students, family members, and friends. Additionally, all this communication-structure became loose: colleagues and students are in the same situation of being overburdened; among family members, some became more spatially close (if all are working from home) and the rest are much more distant (the elderly); friendship changes under the intensification of on-line transnational connections, and the reduction of face-to-face interactions.

In general, the participants report changes in their perception of time and space, which derived into the process of constant reflections about the self, boundaries, negotia-

tions about everyday life practices, coping with emotions, and balancing different roles.<sup>6</sup> We argue that the self experienced a massive reflection triggered by the problematized structures of time and space which were previously determined by life-work and private-professional boundaries and balances. The participants experienced this as requiring constant negotiations and a struggle with their own and others' cognitive and affective positions, practices and identities; they elaborate special strategies to navigate themselves into time and space; they try to schedule the fluid workload, share duties, reorganize space into sub-spaces; create a quasi-office at home, etc. They try to retain a tactical control over life while losing control over strategic planning.

### **Self under Threat: An Emotional Response**

In this section, we turn to the emotional responses of our interlocutors to the changes in their everyday life and their coping with dilemmas significant for their self. Looking at the affective dimension in the narratives of the researchers, we ask how our academic self is expressed emotionally under outbreak. A wide spectrum of emotions was expressed by the participants such as panic, anxiety, nervousness, tension, hypochondria, helplessness, sadness, depressive state, boredom, fatigue, exhaustion, anxiety, spleen, paralysis of will, anger, irritation, annoyance, outrage, sympathy, empathy, pity, pride, joy, rise, happiness, and optimism.

Unknown and dangerous threats (up to *catastrophes* or *apocalypses* as participants defined these threats) interfere with our lives. Subjectivity became fragile in the “catastrophic” social changes under the conditions of “disaster”: “Experience of loss of a moral world is a kind of social bereavement connected to both man-made and natural disasters and registered in the individual and collective body as a sadness, disorientation, anomie, and unfulfillable longing” (Wilkinson, Kleinman, 2016: 9).

This fragility is connected not only to virus and biological risks;<sup>7</sup> a work-life balance and professional obligations are perceived as under the threat that we cannot be “good academicians” anymore (and even don't quite understand what it means now). We explore emotions which are expressed in connection to everyday fulfillment of working obligations while our system of reference (a kind of moral world) is lost.

Our participants notice that they learn new formats of work quickly (e.g., teaching and field research online) and they work more; however, they evaluate their productivity as low and academic performance as poor. There are also gendered peculiarities in productivity – females who have both teaching and childcare obligations were less productive during their COVID-19 related self-isolation, compared to males (Viglione, 2020). Additionally, “the pandemic changed the priorities of academic mothers in a direction that is unfavorable to their careers: mothers devoted most of their time to teaching duties and stopped research” (Minello et al., 2021).

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6. We do not discuss here the vital fears of getting ill or infecting close ones, and the efforts made by the participants to stay safe and keep their children and elderly relatives safe as well.

7. The existential and vital fears and the anxiety of being infected, which are intensively articulated by the project participants and expressed in emotional language, are beyond the scope of this article.

Both women and men in our project report their non-productivity (though women tell more about their conflicting work-care demands) causing *anxiety*, *shame*, and *guilt*.<sup>8</sup>

*Anxiety* (in relation to uncertainty in COVID-19, see also Rebughini, 2021), an exhaustion of cognitive overload, and tiredness appear as reactions to changing lifestyle patterns and societal situations. The descriptions of situations having catastrophic overtones in diaries as self is connected to vital risks and instability of various institutions such as healthcare, economics, and education. The personal working plans are tightly interwoven with other crisis conditions, vital risks are marked by professional belonging; special efforts are done in order to manage emotions and maintain a workable state, but this does not help much. Anxiety, panics, tiredness constantly accompany us:

I sleep very badly, I have disturbing dreams, I wake up on alarm clock (to have time to work before the daughter gets up). In my dreams everything usually happens amid coronavirus, for some reason my colleague anthropologist turns out there (I guess that is how my brain is trying to remind me about hygiene, washing hands). I wake up tired. Started to drink coffee at evenings to work. A vicious cycle . . . I think that there is no reason not to panic and greenlight the anxiety. Changes to constitution, fall of a ruble, closed borders, cancellations of working plans, the threat of economic crisis due to the pandemic, threat of virus, everyday challenges (working by the monitor, limitation of contacts, children).

(Marina, March 2020)

Anxiety becomes the central category in emotionally saturated narratives because it appears situationally and becomes a background for everyday routines. Constantly focusing on problems makes participants feel even more anxious and frustrated, as discourse (in networks and the media) is increasing anxiety. The virus is social and we are all forced to be involved in the virus discourse, but sometimes we want to limit its presence and free cognitive resources for something else:

In the last days I am trying not to read the news about the epidemic at all. I am tired of them, just as I am tired of discussions in social media about it. Obviously, most rapidly the virus is spreading and infects the informational space, infects discourse. We are all not just supposed to discuss the pandemic, but as if we cannot undiscuss it. We cannot break away from it, cannot shift the focus.

(Vadim, March 2020)

The inability to act in a “proper way” causes *guilt* and *shame* for being academically unproductive and unable to manage routine tasks, both in the professional and the personal spheres. These moral emotions demonstrate reactions to these violations of cultural codes (standards), when oneself “(not) do the right thing” (Haidt, 2003; Turner,

8. We should notice that here we explain the subjective experiences of studied academicians but their real productivity was not explored. We know from the literature that there was an increase in publications in 2020 (compared to the same period in 2019), with less output from women (Else, 2020). This does not confront the evaluations of our informants as they choose the coping strategy of overworking to get rid of anxiety, as we will see further.

Stets, 2006; Creed et al., 2014). In this case, moral emotions express a distortion of basic references, and create dilemmas significant for the academic self. We are expected to be productive, disciplined, and control the circumstances (including time and space), but we do not manage to. Loss of self-control and the (subjectively experienced) decline in academic productivity challenged our subjectivity — we do not know who we are without our productivity and evaluation by others. We are confused and try to discipline ourselves, but we are not successful enough in these efforts.

*Guilt* and *shame* are usually associated with breaking promises and the inability to fulfill obligations: academics blame themselves for being unproductive, not able to concentrate, losing the academic race (they also feel guilty for breaking the rules of social distancing, or spending little engaged time with family):

Two days couldn't make myself work. I woke up, walked with the dog, hung out in Facebook, — hardly wrote down a couple of paragraphs for the article, Facebook again, the evening walk with the dog — more news — lights out.

(Victor, March 2020)

Participants endlessly repeat that their non-productivity causes guilt and shame:

Creative paralysis. The article is postponed, books are postponed.

(Leonid, April 2020)

I feel guilty because I cannot react [on incoming work tasks] quickly. I want to work and work all the time I can . . . but anyways I have feeling of anxiety and guilt because of the tasks that are postponed.

(Marina, May 2020)

Its 2–2.30 pm . . . I feel that I've done so little. As a result, during following hours I have written two short applications on [foreign language] . . . Received reviews for the article . . . Trying to find a native speaker for proofreading another article . . . In the evening, attended Datacamp, studied one chapter on sql . . . Trained [foreign language] a little bit. But the rest of the time I hang out in social media, watch stupid videos. I feel myself time killer and idler.

(Ivan, April 2020)

An “obsession” with productivity and control becomes the reaction to the vanishing system of referents; however, the shared feeling expresses that we “lost the race”, though the work load has expanded to overtime, weekends, and night time:

Since the morning I am getting messages in working chats and working emails — I am slightly disappointed, because I have a feeling as if I was skipping the work, although its Sunday and I already have working plans. But I still cannot get rid of the feeling that it's a race I already lost, while still can't get off the distance.

(Valeria, May 2020)

The participants discovered that the collective rhythms of their social and professional lives have been disturbed by self-isolation, distant teaching, and the absence of field research and face-to-face communication. We struggle with the new condition, but express our feelings and emotions of not being successful, not managing to organize ourselves well enough, feeling guilty, and endlessly reflecting on our self.

### **The Academic Self at the Start of Pandemic: Reflexive and Fragile**

Here we are interested in what happened to self when we lost the criteria of our relevance (which to a large extent had been created in interactions with colleagues) and communications itself lost its previous structuring by time and space. We do not meet each other in university corridors or conferences anymore to learn recent news and gossip, or show enthusiasm for a new project, or get spontaneous feedback. We will demonstrate that the self of academicians has been reconsidered, and narrativization became a tool to do this.

#### *The Academic Self Withdraws from Face-to-Face Communications*

In the time of COVID-19, the breakdown of the content of work did not change radically, but had to be brought online and adapted to these new challenging and limiting conditions. As a whole, privileged academicians perceived themselves as fragile and vulnerable, as distant work caused many troubles from the beginning of self-isolation. The self of academicians is to a large extent produced via the juxtaposition within reference group(s) in everyday routine face-to-face performances in the working time and space. Scholars claim that absence of “real human interactions”, the demise of narrative dimension of human lives during COVID-19 leads to emptying our human experience (Fernandez, 2021), and a feeling of isolation emerges as the result of distancing from one’s colleagues on a daily basis (Utoft, 2020).

The pandemic changed not only the practices, but the embodied positioning of self within the social (professional) group, thus limiting opportunities for self-presentation. In order to maintain self, we have to work a lot, demonstrate results and receive approval, not only for our strategic achievements (top-rank publications), but also on our engagement, which is the personal embodied inclusion in the informal life of the scientific community. In the light of losing these informal practices, we understand how academic life is embodied in networking and human communications in a numerous occasions in certain space and time:

I wondered why we are canceling all conferences (today one more), because some can be held via Skype (especially small ones), and it’s not so difficult. The essence and fabric of the conference is probably not in the scientific component (well, well, not only) — to come, move, treat it as an event, hang out, break out of one academic routine (and end up in another). This is how you learn new things about conferences through the pandemic, and about scientific life in general.

(Elena, March 2020)

Online communication with colleagues still causes feelings of joy and unity (although it does not happen spontaneously), should be organized and have an agenda, but causes physical discomfort and requires more concentration:

We conducted Zoom with the St. Petersburg office. It was great to see everyone again. We discussed who \_ survived\_, different plans and just joy. I feel support, some kind of unity, solidarity. In general, there are many pleasant feelings.

(Svetlana, June 2020)

Systematic face-to-face verbal and non-verbal interactions used to be a part of our routinized evaluation and recognition. An academic reputation includes validation by the professional community; therefore, we are constantly sending each other signals that allow us to judge of our own or someone else's competences (Sokolov, 2020, 2021). Beside formal results, numerous informal signals allow scholars to express themselves in relevant displays, and to decode the current dispositions in professional fields. In other words, via informal communication in "second" and "third" places (Oldenburg, 2000), academic relevance and "proper" performance is verified.

The self is built via practices and interactions which are routinized, inscribed into a certain temporality, and are fixed into a certain space and time with a certain rule. This self was constantly produced in mutual personal exchanges of the norm and rule of a "suitable" working load, distributed in space and time, though still relatively flexible. Beside this networking appears to be the means of belonging and support in the formal structure of academy. Finding a team or a protective leader is no less important for academic sustainability than the approval of fitting meritocratic ideals of intellectual excellence (Gaiaschi, 2021).

This approval in everyday routine face-to-face performances was lost in corona time, and threatened the academic self. Various forms of academic networking and engagement were radically and rapidly changed. This rupture of tradition has led us to self-reflection in the attempt to recognize our place in seemingly changing social structure:

In the dining room I meet with [three colleagues]. We talk for about 30 minutes. Everyone is very complaining about the remote format. [Soon] my course starts. So I am listening, collecting information. I have no idea how to teach remotely. It seems to me that this is death for the teacher.

(Irina, March 2020)

Routine face-to-face juxtaposition, crucial for maintaining the academic self, became blurred and uncertain, and academic researchers lost their inspiration (Utoft, 2020). We suffer from the lack of a "humane presence" and try to compensate it with new rituals, examine new actions and shape new norms, tastes, and politics; in other words, frames of reference for our academic self:

In the evening, a meeting of our institute laboratory was held in zoom. Interesting, albeit a little sleepy. It seems that the speaker and all the participants in the meeting more often than necessary say “thank you all for the fact that despite . . .” and “sorry for the technical overlaps”, although there is a feeling that this is just compensatory factual rhetoric, there is not enough live presence.

(Leonid, April 2020)

### *The Narrativization of Experience: The Reflexive Self*

As we lost the system of relevance and feel that our academic self is under threat, we try to cope. Among the copying strategies are reflexivity and the extensive narrativization of ones' experiences (certainly, not all scholars tend to narrate their experiences, here we refer only to the group we studied). As we mentioned at the beginning of the article, participants felt a need for writing diaries, which is the narrativization of their subjective experiences:

I began to write something down just to remember the days.

(Svetlana, April 2020)

This diary is very useful to me . . . Very disciplining.

(Nina, June 2020)

Under crisis (or even conditions perceived as a *catastrophe*), we reconstruct our academic routine, but not to become winners in the academic race (subjectively *we already lost it*, as participants note) in the old system of references, but to reconsider the new one, which is adaptive for the new conditions. This is why we need a constant narrativization of our reflections, and a synchronization via extensive online communication. Expressed emotions point at the frames of reference of our academic selves, that is, at its most vulnerable parts. We managed to reconsider the new frames of reference and our personal disposition within it relatively quickly.

The rise in online communication, “obsessive productivity”, the many public reflections in social media, new skills, and new forms of interactions create new dispositions in the professional field. We learned the skills of online interviewing and ethnographical work; we coordinate activities via chats; we use to work with those whom we never met in person. Many institutional rules are changing since we observe less rigidity in bureaucratic demands, development of new requirements (technical skills, formats of teaching and research), absence of international academic traveling, and offline fieldwork. The “Zoomification”, the reduction of academic mobility, and the increase of their work load became the new academic routine. Researchers were ambivalent and uncertain about the changes that would remain with us *after* everything is over. As one of participant summarized in May, 2020,

When the quarantine is over . . . people will have to live like in 2019. And many will be scared. Coronavirus is a state of mind. The new existential order. Virus will be gone, but its' phantom will remain.

(Leonid, May 2020)

In a few months, emotions and practices were routinized, the self did not need that extensive reflection, and restrictive measures also became less rigid and more uncertain. The motivation to narrate new experiences declined, and with every new “wave” of the research and diaries’ collection, we found that the writing was running low, and by the mid-autumn of 2020, the enthusiasm was mostly over, although with some exceptions. Intensive emotions were expressed less and less, while narratives became shorter: “Virus kind of encapsulated. It is somewhere” (Elena, May 2020), and “Just ordinary life” (Yana, May 2020). Or, perhaps, it became difficult for participants to keep the same level of emotionalization as before:

The very thought of daily registering my emotions about the closed borders, zoomification of communication, death of industries, and most importantly — the standing behind all this amazing incompetence and lies and hypocrisy of the epidemic services, which authority turned out to be higher than presidential one, almost caused panic attack in me . . . I cannot think about it anymore, write and talk.

(Leonid, September 2020)

Participants started to look for new references within unstable social coordinates in order to reconsider their professional everyday life patterns, to make them habitual, and it was the reflexive self that made them do this. In the autumn of 2020 (or sometimes earlier), when the majority had lost interest in writing diaries, new practices were integrated into their self-perception, making us less reflexive about emotions and crucial changes brought on by the pandemic. Self-evaluations and evaluations relocated to endless Zoom meetings, social networks, including transnational ones, and to a very closed circle — the self becomes stabilized into the new system of references and, we guess, became more individualistic and flexible. When the new social order becomes inhabited, the need for narrativization has gone:

I caught myself on thinking that every day I think before going out, that I am about to write something down in a diary. But when I get home, I understand that I haven't recorded anything. I didn't think about anything. It became impossible to fix anything, everything became commonplace and everyday life routine. Nothing becomes an eyesore, does not stand out, does not bother.

(Ella, May 2020)

## Conclusion

During the first months of COVID-19, in relating self-isolation, we observe a rise in the narrativization of people's experiences, including the groups that are not at the highest

risk of getting infected. With the example of academic workers, we explore why there was such an intense emotional response towards the ruptures in their everyday/professional practices. We argue that the professional self is reflexive, and actively reacts to changes in temporal and spatial structures. They derived into overload with duties (all happening “here and now”), the social clues of self-evaluation in the academic world about new virtual performance and professional position were lacking, and the feelings of being dissatisfied, anxiety, shame, and guilty emerged.

In this article, we demonstrate how the “academic self” in a privileged social group was unexpectedly challenged by the pandemic, as researchers express their insecurities, vulnerabilities and frustrations. We show that such an intensive emotional response as related to the professional self was caused by the acceleration of time and the collapse of boundaries between the private and public spaces. Time was perceived as a limited resource; researchers became overburdened with professional duties and online communications; activities, previously performed at a different time and space, competed with each other.

Unstructured time and space, and overlapping tasks and duties resulted in subjective experiences of low productivity, that is, the inability to act in a “proper” academic way. This was causing anxiety, shame, and guilt. We feel that we are losing the academic race and also not managing well in other spheres of life. The academic self is, to a large extent, constructed in everyday academic interactions, which gives us the tools for self-evaluation and self-construction, while results of work and activities are approved (or not) by colleagues formally and informally. Unfortunately, this was lost in on-line work as well. Then, we turn to reflexivity — an act of self-reference — that help us to reconsider the frames of reference of our professional self, its norms, values, rules, symbols and signs of success, and our place in it.

Academicians — despite their quite safe positions — felt vulnerable. Their sense of belonging to academia was threatened by the unavailability of the habitual ways of practicing work and group communications. We demonstrated an intensification of labor along with the rise of narrative reflexivity and strong emotional responses as the reactions to the pandemic changes. These lasted for some time (several months) until new patterns of work were habitualized (we got used to online teaching, interviewing, developing projects, etc.) and elements of offline communication came back into the lives of scholars. However, the long-term effects of the pandemic on various specific groups of academic workers (e.g. women or young scholars) will need to be studied further.

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## Академические работники на карантине: рефлексивность и уязвимость привилегированной группы в начале пандемии

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Цель данной статьи — проанализировать изменения, которые произошли в жизни социальных исследователей в первые месяцы пандемии 2020 года, когда и работа, и повседневность, и академическая рутина стали проблематизироваться и преобразоваться. Статья опирается на данные дневников, в которых исследователи с академическим опытом в социальных и гуманитарных науках фиксировали свою повседневную жизнь и рефлексировали по поводу ее изменений. Нас интересует, почему «академики» — относительно привилегированная группа, которая имела возможность безопасной удаленной работы и выполнения своих профессиональных обязательств во время периода самоизоляции, — испытывали фрустрацию и сильные моральные эмоции, связанные с работой. Мы показываем, что основные координаты — пространство и время, — утратили привычную структуру, препятствуя продуктивности и угрожая «правильному», дисциплинированному и продуктивному академическому «селфу». В дневниковых нарративах участники проекта описывают эмоциональные реакции на эту ситуацию, в том числе негативные чувства тревоги и вины за снижение продуктивности. «Новая» академическая реальность характеризовалась соединением (прежде разделенных) задач в одних и тех же временных и пространственных координатах и, как следствие, ощущением постоянной перегруженности. Одновременно с этим, академические сотрудники лишились рутинных форм профессиональной коммуникации и нетворкинга на повседневной основе. Данные показывают, что академические сотрудники ориентированы на самодисциплинирование и продуктивность, и их профессиональный «селф» производится через нормативное оценивание, самооценивание и сопоставление с референтными группами. Когда правила изменчивы, нестабильны или постоянно нарушаются, то это становится угрозой для «селфа». Моральные эмоции служат маркером данного процесса до тех пор, пока «новый» социальный порядок не становится обжитым и рутинизированным.

*Ключевые слова:* COVID-19, пандемия, эмоции, академия, селф, идентичность, дневники

# Communicating COVID-19 on Social Media: The Effects of the Spiral of Silence

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In this paper, the Spiral of Silence theory (SOS) in the study of mass communications is applied to examine the trends and mechanisms of public opinion in Social Media (SM), using the popular topic of the COVID-19 pandemic. The study includes a secondary analysis of the data on pandemic information consumption obtained through four mass surveys conducted in Armenia. In the period from July 1 to August 30, 2020, we also surveyed Armenian Facebook users by means of Google forms during the highest outbreak of the pandemic in Armenia. In particular, the study demonstrates that although the majority of people are well informed about both public conduct requirements and the sanctions for misconduct during the pandemic, they do not follow the rules but hide their real opinion, preferring to openly agree with the official position while silently breaking the rules (that is, they keep their silence). We have found a correlation between the opinion environment of “friends” and other Facebook users, and a willingness to express their own opinion. Due to the predominance of the self-presentation mode as a communication strategy on Facebook, there is a trend among Armenian users not to risk their reputation, and avoid possible critics by keeping silence, if the discussion goes against their opinion. The findings of the study might be helpful both for the further development of communication theories and its application to the conditions of new pandemic reality, and for a better understanding of communicative behavior mechanisms in SM.

*Keywords:* Spiral of Silence (SOS) theory, Social Media (SM), mass communications, behavior, COVID-19 pandemic, collectivist societies, Armenia, Facebook

## The Spiral of Silence Logic in Social Media

Social media (SM) is defined as “Internet-based, disentrained, and persistent channels of mass personal communication facilitating perceptions of interactions among users, deriving value primarily from user-generated content” (Carr, Hayes, 2015). SM is developed on the platform of Internet social network sites (SNS), and tends to gradually replace traditional mass media (de Zúñiga et al., 2012). As a mass communication medium, SM has

a number of characteristics, including: (1) a programmability as the capacity of a central agency to manipulate content in order to define the audience's watching experience as a continuous flow; (2) popularity (agenda-setting) as an ability to push certain topics to the fore, making it measurable and quantified; (3) connectivity as a function connecting the content, users activities, and advertisers, and (4) datafication as a function rendering many aspects of the world that have never before been quantified into data (van Dijck, Poell, 2013).

Due to its advantages over traditional media and constant technological innovation, SM not only reflects but also shapes and directs (redirects) public discourse, actively affecting social and political processes (Comminos, 2011). The information exchange through SM is quick, allowing to overcome any physical distance, bridging geographical, political, and economic periphery with the center, "flattening" public perceptions by increasing similarities and decreasing varieties (Friedman, 2006), and synchronizing the actions of communication participants (Metzger, Tucker, 2017; Zayani, 2016). Through the virtualization of communication between different population strata, economic differences of SM users get eliminated in favor of popular discourse (Breuer, 2012). The illusion of equality caused by virtual communication on SM makes it symbolically and functionally attractive to the audience. Thanks to virtual technologies, information from a mobile phone (for example, a video filmed by a witness of an accident) uploaded directly to SNS might serve as an alternative news channel, and then appear on TV. Thus, SM has the effect of multiplying information (Brouwer, Bartels, 2014). One of the key factors that affect the shaping of public opinion representation on SNS is the news consumption culture (Ohlsson et al., 2017).

In order to understand whether public opinion representation on SNS is affected by the same (similar) mechanisms as those used by traditional mass media, we apply the Spiral of Silence theory (SOS) as developed by Elizabeth Noelle-Neumann (Simpson, 1996). According to the SOS theory, the guiding mechanism preventing expressing one's opinion publicly is the fear of being isolated; if people consider their opinion to be dominant or likely to become such, they tend to express it publicly. If they decide that opinion is on the minority side or is likely to become such, they tend to show conformity and choose to remain silent (Liu, Fahmy, 2011). Led by the "fear of isolation", individuals are less likely to express their own viewpoint when they believe their opinions and ideas are in the minority. As a consequence, they tend to be misled about the real situation with public opinion. According to the SOS, a desire to avoid negative social sanctions tends to leave the person socially ostracized (Neuwirth et al., 2007).

The everyday monitoring of the so-called "public opinion climate" (Lee, Yan, 2020) is shaped through both direct and indirect channels. Direct channels include face-to-face discussions like communication during public events such as protests and other mass actions. The main indirect channel is the media which presents opinion poll results, polls conducted on the streets, general sentiment of news, etc. (Kim, 2017). The media sets and structures issues, thus shaping the agenda. They also assure an individual's selective perception and protect them from cognitive dissonance. Thus, stereotypes play a signifi-

cant role in this process, triggering conformity, and making the discussed topic clearer (Shanahan et al., 2004).

The rise of SM platforms brought new challenges for SOS researchers. The research methodology for applying the theory to social media is varied, and the results are mixed. One of the first studies to address the topic revealed that the SOS continues spinning on Facebook, as the users' network on this platform is based mainly on their offline connections. Self-censorship also has a negative influence on the user's decision to leave a public comment on a specific topic (Gearhart, Zhang, 2014).

A positive correlation between the perceived opinion climate and the willingness to express a viewpoint has been revealed through meta-analyses; moreover, compared to traditional media, the spiraling process on digital platforms does not decrease (Matthes et al., 2018). There are some variations of the SOS effects on SM that are determined by common stereotypes about expressing a personal opinion in public (including cultural, religious, and gender determinants), as well as by the different level of freedom of speech and the Internet in the societies in comparison (Druzin, Gordon, 2018; Steen-Johnsen, Enjolras, 2016).

Chaudhry and Gruzd conclude that on Facebook, a predominantly non-anonymous and moderated platform, the vocal minorities are comfortable with expressing unpopular views, e.g., racist viewpoints, the fact that throws the SOS theory into question (2020). We would oppose this argument because the open expression of racist viewpoints in SM is unfortunately not a minority's behavioral model, but rather a trend if viewed in the context of wide-spread hate speech on the Internet (Alkiviadou, 2019; Guiora, Park, 2017). Some scholars have demonstrated that political discourse in SM is mainly irrational, emotional, and aggressive (Malaspina, 2014). In particular, Twitter publications expressing the majority's opinion have a higher level of emotionality than those of the minority (Luo et al., 2016).

Nuebaum and Krämer assume that various contextual factors such as audience familiarity, the communication channel, or the effect of negative sanctions on an individual's expectations if they represent the minority's view also determine an individual's fear of isolation (2016). Other studies point at opinion congruency as another factor affecting the willingness to express opinions via social media (Hampton et al., 2014).

People avoid speaking out when they notice that their opinion differs from the one prevalent among their online network or from the general public, and tend to search for information confirming their beliefs (Schulz, Roessler, 2012). Based on the users' online behavior, the SM algorithmic logic also plays a similar role in news consumption (Roy et al., 2017). When a user starts seeing homogenous content which usually interprets issues from one point of view, the algorithmic logic causes the risk of public opinion polarization. As a result, a diversity of opinions creates an isolated homogenous environment instead of stimulating discussions between opposite poles (Wilhelm, 2000).

Such homogenous environments (echo chambers) produce a fake diversity of opinion and surround a user with similar views, resulting in "pluralistic ignorance": a representative from each pole surrounded mainly by one point of view ascribes it to the majority

(Liu, Famm, 2011). The homogenous SM environment contributes to the formation of a close circle of like-minded opinions. The risk of negative feedback also decreases the users' willingness to express an opinion (Gearhart, Zhang, 2015). The homogeneity of SM refers not only to the content but also to the sentiment of opinions.

Another important factor affecting the willingness to express an opinion via social media is the concern over self-presentation. SM has become one of the main platforms for an individual's self-expression and public image presentation. Any published information becomes a part of the users' digital identity, and functions as a symbol for their self-presentation. Although some researchers have revealed a positive correlation between self-presentation on Facebook and a willingness to express political views, everything depends on the purpose and character of self-presentation. If a user tends to create a self-presentation which aims to form a long-term positive public image, they will express opinions more actively. If self-presentation is protective and aims to avoid criticism, the user will avoid speaking in the conditions of high opinion diversity (Liu et al., 2017).

Finally, some authors point at the individual factors which might slightly shift the SOS logic of SM users toward some exceptions. These exceptions might be caused by a variety of factors, such as the user's personal attitude toward another's view if it is validated higher than the majority's opposite opinion climate (Fox, Holt, 2018); these factors need additional examination.

In order to test the SOS theory further as well as to identify the patterns and mechanisms that structure public opinion on current issues as popular topics discussed via SM, we will consider the features of public opinion on SM regarding the COVID-19 pandemic in the following section.

## **COVID-19 on Social Media**

The global pandemic of COVID-19 reportedly started in December, 2019. It became globally known in January, 2020 (Shangguan et al., 2020), thus causing changes and bringing new challenges for all spheres of society world-wide. Almost all spheres of public life rapidly slowed down since a lockdown was announced in many countries, with forced distance work, on-line education, and travel bans. Such radical changes in people's lives brought an inevitable economic (Hotez, 2020), and social and psychological transformations (Prosser et al., 2020; Ali, Alharbi, 2020).

A growing number of COVID-19 consequences for national and global economies, public health, and everyday life (Gautam, Hens, 2020; Gautam et al., 2020) made the pandemic an actual and complex multidisciplinary research topic. Constantly-changing COVID-19 statistics (Pearce et al., 2020; Hoseinpour et al., 2020) as well as the limited effectiveness of national policies for tackling the disease (Law et al., 2020), made COVID-19 "invisible" and unpredictable. Accordingly, a systemic approach to its study might help better understand not only its biological roots, but also its multilevel dynamics including socio-psychological causes of its spread and its consequences. In this section, we are go-

ing to address some structural peculiarities of public opinion on COVID-19 as reflected in SM.

The COVID-19 news spread in the media much faster than the pandemic itself, capturing information spaces in societies where the pandemic had not yet been detected. In particular, in January, 2020 (the beginning of the pandemic), information on COVID-19 was found 27 times more often in the headlines and 23 times more often in articles of the print media than the name of the Ebola virus in the first month of its appearance in August, 2018 (Ducharme, 2020).

Similarly, the spread of SM-posts about COVID-19 was immediate. As the Gallup/Knight Foundation reported in a survey conducted in April, 2020, 46% of SM users in the US said that “almost all” or “most” of what they see on SM sites is about the pandemic, and an additional 37% said that “about half” is on COVID-19. Over two-thirds of SM users said that coronavirus-related posts from public officials (70%) and news organizations (68%) were “very” or “moderately” helpful; 57% said the same about posts from family members and friends, while fewer said so about posts from neighbors (43%) (Ritter, 2020). Simultaneously, a growing number of studies on the SM-coverage of the pandemic appeared immediately after the massive spread of COVID-19.

According to studies conducted in China, the SM-coverage of COVID-19 has had a rather positive impact on the population in the case of (1) facilitation and distribution of new information to providers of medical and other assistance on the front lines; (2) the utilization of SM-platforms by healthcare leaders to directly communicate with the public, sharing information that was traditionally relegated to medical journals and hospital video sessions; and (3) helping healthcare providers identify trends and to prepare for surges in acuity (Gottlieb, Dyer, 2020). In particular, a group of active clinical mental health providers based in Wuhan, China, and familiar with Chinese culture utilized an existing SM platform (WeChat) immediately after the pandemic broke out, and voluntarily provided peer-to-peer psychological support to frontline healthcare providers in Wuhan, which was considered an effective crisis intervention experience (Cheng et al., 2020). WeChat, as the largest social media in China, was monitored for public discussions on the pandemic in order to reveal the main topics and emphases of public consideration (Lu, Zhang, 2020).

However, some studies show that the unregulated massive SM content on COVID-19 has spread rumors about the “real nature” and “real causes” of the pandemic, becoming a source for panic and a reason not to follow healthcare instructions. In particular, there is a positive correlation between the use of SM as a source of information about the pandemic and COVID-19 conspiracy beliefs. The negative association is identified between COVID-19 conspiracy beliefs (“the coronavirus may not exist”, “its lethality has been exaggerated”, “its symptoms may have a non-viral cause”, and so on) and specific health-protective behaviors (Allington et al., 2021).

Although SM has been putting in efforts to combat COVID-19 misinformation across its platforms by fact checking and removing false claims or banning ads with pandemic-related content and prioritizing it in search results and newsfeeds (Hutchinson, 2020;

Ferry, 2020), such attempts still go hand-in-hand with the spread of rumors and unverified information. This is especially relevant when considering that fake information in SM spreads faster than in traditional media (Vosoughi et al., 2018).

The U.N. Secretary-General, António Guterres, called the COVID-19 media coverage a “pandemic of misinformation” (Worrall, 2020). Similarly, a massive spread of disinformation, panic, or an underestimation of the pandemic threat through SM has been called an “infodemic”, which was defined as “the rapid spread of misinformation or fake news through social media platforms and other outlets” (Chong et al., 2020).

Among the negative consequences of the infodemic on SM are the social stigma around COVID-19 (Tasnim et al., 2020), loneliness (Banerjee, Rai, 2020), the personification of the public discourse on the pandemic based on individual cases, the irresponsibility of information broadcasted and the disruption of social trust (Tulchinskii, 2020), as well as the dissemination of drugs not prescribed or officially approved (Carius, Schauer, 2020).

Despite a growing actualization of the issues regarding SM use during the pandemic, we did not find any study which would explore SOS effects in the public discourse in SM regarding COVID-19. The research question we are going to examine in the next section is whether the fear of isolation, the domination of majority thinking, and other elements of the SOS logic have influenced COVID-19 public discourses on SNS.

The main interest of the study is to explain the dynamics and mechanisms of virtual communication regarding COVID-19. We do not have the objective to explain the real (offline) behavior of the society in the pandemic, including such determinants as the level of trust in public policies and institutions, or models of conduct in public places (transport, cafes), etc. Knowing the statistics of official rules violations during the pandemic helps to reveal the structure of virtual communication regarding the public attitudes towards COVID-19 and, in particular, to understand why the majority prefers to agree with official statements but behave differently.

The spiral effect is considered when we talk about the influence of a friendly/unfriendly climate of opinion on the personal mindset and communicative activity of a user. Combining the secondary analysis of the field data collected in the period of the research with our survey, we look at the influence of the Facebook climate of opinion on the Armenian users involved in online-communication on COVID-19. In relying on the SOS theory described above and applied to social media platforms, we look at the correlation between the perceived climate of opinion and the willingness to express one’s own judgments. In particular, we examine the theoretical statement that people avoid speaking out when they notice that their opinion differs from the one adopted by their online network or by the general public. The spiral effect appears when the homogenous social media environment contributes to the formation of a close circle of like-minded opinions. We examine this process through Facebook users’ preferences to communicate or react to “friends” and avoid open communication with non-friends. The larger the group of respondents preferring to communicate inside the circle of like-minded “friends”, the stronger the climate of opinion influences their own mindsets. Consequently, the spiral

effect here is not merely a common fact but a characteristic of communication, and, following the SOS theory, we also try to reveal a correlation between self-presentation on Facebook and the willingness to express one's own views on popular discursive topics (COVIDd-19).

### COVID-19 Perceived by Armenian Facebook Users: Research Methodology

Armenia is a post-Soviet Christian country with a population of approximately 3 million people<sup>1</sup> bordering Georgia, Azerbaijan, Turkey, and Iran.<sup>2</sup> According to the typology of the societies in terms of collectivism vs. individualism as developed by Geert Hofstede (2011), Armenia is a collectivist society with prevalence of "We" over "I", and of group thinking over individual choice.<sup>3</sup> There are few existing comparative studies on the SOS logic among SM users in individualist and collectivist societies which confirm the hypothesis that the significance of the majority's opinion regarding one's own actions (comments, posts, or likes) is higher in collectivist than in individualist cultures (Huang, 2005). The prevailing collectivist values might serve as another mechanism of public opinion consolidation around popular frames of thinking and behavior in COVID-19 conditions, which makes the Armenian case-study useful for understanding the logic of thinking in other collectivist societies.

Thus, this is the first study of public perceptions regarding the pandemic among SM users in Armenia in terms of SOS, and the first test of the SOS theory applied to Armenian society. It might also contribute to the studies of public perceptions and SM-communications within the context of the SOS theory and collectivist values. Revealing the mechanisms of SM-based public perceptions regarding COVID-19 in Armenia might also help to better understand the dynamics of public opinion in other countries with similar attitudes.

In our study, we have made an attempt to assess the level of trust toward various sources and channels of information on the pandemic among the Armenian users, including SM; to identify the attitudes of Facebook users in Armenia regarding the origins and the level of the COVID-19 threat, as well as toward policies adopted by the Armenian Government against the pandemic; to examine the reasons for such attitudes, including the significance of the majority's opinion in determining individual choice; to analyze the intensity of various models of communicating the pandemic as practiced by Armenian Facebook users, and to assess the role of the opinion climate perceived as either supportive or negative for an individual communicative action.

The field part of the research consisted of two stages. During the first stage, a secondary analysis of the four mass surveys conducted in Armenia regarding public perceptions

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2. Armenia Country Profile. BBC, 18 November 2020. Available at: <https://www.bbc.com/news/world-europe-17398605> (accessed 20 November 2020).

3. Hofstede Insights. Country Profile: Armenia. Available at: <https://www.hofstede-insights.com/country-comparison/armenia/> (accessed 17 June 2020).

on COVID-19 has been implemented.<sup>4</sup> During the second stage of data collection, an online survey was conducted via Facebook (as the most popular SM in Armenia) in using Google forms (from July 1 to August 30, 2020). The survey was conducted when the number of COVID-19 cases in Armenia was on the rise.<sup>5</sup> In the period of the survey (July-August 2020), about 1,761,000 users have been on Facebook,<sup>6</sup> which makes about 60% of the Armenian population and 75% of social media users in Armenia.<sup>7</sup> The questionnaire was designed in Armenian and placed in a free access so that respondents have been chosen according to their interest in participation, and were not limited by friends or friends of friends of the interviewers as Facebook users. The survey was stopped when responses were no longer received. There were 610 Armenian Facebook users who participated in the survey. The data collected was processed by means of SPSS software, Version 21.0 for Windows (IBM SPSS Statistics).

Among the respondents of the survey conducted in terms of the study, 49% are male and 51% are female, most of them are young people (80%), 19% were from the middle-aged population, and 1% are those were over 56 years old; 66% are inhabitants of the capital Yerevan, 18% are urban, and 11% were rural residents of Armenia. The 4% of Armenian respondents who addressed the survey but lived outside their home country at the moment are excluded from the analysis. These figures reflect the gender proportions of Facebook users exactly in Armenia (51% are women and 49% are men). The respondents' proportions by age are the same as those of Armenian Facebook users; the younger population is a majority (57%), while people over 55 years old comprise a minority (4%) of users.<sup>8</sup>

There are some limitations for this survey which should be considered when interpreting the results. The sample size, as well as the fact that only Facebook users were included in it, does not allow the results to be applied to the whole of the Armenian population. However, this study sheds light on the mechanisms of public opinion and communicative behavior on social media during the global pandemic.

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8. Facebook users in Armenia, July 2020. Available at: <https://napoleoncat.com/stats/facebook-users-in-armenia/2020/07> (accessed 01.07.2021).

## Research Findings and Discussion

Like many other countries, Armenia suffered heavily from the COVID-19 pandemic, registering the highest level of deaths proportional to the regional share of its population (Mejlumyan, 2020). Communications on COVID-19 were held in parallel by several state organizations: the Government, the Commandant's office,<sup>9</sup> the Ministries of Health, Labor, and Social Affairs, Economics, and Foreign Affairs. The first imported COVID-19 case in the country was registered on March 1, 2020. The Government declared a one-month state of emergency on 16 March; it has been extended five times since (Hovhannisyan, 2020). During the state of emergency, different channels including live and status updates on SM platforms, SMS messages, and press conferences for media representatives have been used.

The Government of Armenia aimed to control the information flow at the early stages of the lockdown, trying to ban any non-official information on COVID-19 cases by declaring a state of emergency.<sup>10</sup> This attempt at the regulation of the information sphere failed, raising debates on media censorship.

At the same time, the absence of a central information source caused many difficulties for proper media functioning as well. Among the main reasons contributing to the rise of COVID-19 misinformation in Armenian media is an insufficient level of media-literacy and public fears regarding the pandemic, the media's and some other actors aim to sensationalize the topic of the pandemic, intentional manipulations, as well as local entrepreneurs trying to save their business by urging people not to take the pandemic seriously and to continue using their services (Grigoryan, 2020). Besides, there has been a problem concerning the systematic delivery of messages, their accessibility, and perception by different groups in society. As a consequence, misinformation and fake news quickly spread through the society, selling fictions and conspiracy theories regarding the "fake nature" of the pandemic or rumors about the "microchipping of society" in the form of the vaccination.<sup>11</sup>

Analyses of the studies conducted by partner organizations mentioned above show the Web as the most popular source of COVID-19 information in Armenia ("Public attitudes towards situation," 2020), while its most trusted sources are the officials responsible for the pandemic ("Assessing the level," 2020). Our own survey supports these conclusions demonstrating that Facebook posts by officials are the most trusted news sources regarding COVID-19 in Armenia; 45% rather trust and 12% totally trust the public officials. The experts' opinion is another trusted news source on the pandemic, at 47%. Meanwhile, the

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11. Ghazanchyan S. Armenian Health Minister worried about COVID-19 conspiracy theories running rampant. Public Radio of Armenia, 15 May 2020. Available at: <https://en.armradio.am/2020/05/18/armenian-health-minister-worried-about-COVID-19-conspiracy-theories-running-rampant/> (accessed 25 July 2020).

least trusted news sources regarding COVID-19 are Armenian newspapers (33% totally do not trust) and TV (29% totally do not trust). Influencers also have a low level of trust; only 2% totally trust them. In case of radio, Armenian and foreign channels are trusted almost equally (5% totally trust, 40% rather trust and 6% totally trust, and 36% rather trust accordingly).

It is remarkable that there is almost no difference between real and virtual friends (on Facebook) as source of information regarding the pandemic for Armenian respondents. Friends/relatives as well as “friends” on Facebook are the least trusted (15%) pandemic-related news sources for respondents in Armenia. The respondents trust Armenian online sources slightly less (6% totally trust and 35% rather trust) than foreign websites (6% totally trust and 56% rather trust), and only 8% of the respondents indicated that they do not trust any information source. These results contradict the idea of the Armenian society being collectivist. Although, considering that the majority of our respondents are young people, we can assume that the younger generation acts in a more individualistic and rational way while choosing trusted sources of information.

One of the reasons why the majority in Armenia trust official sources of pandemic information and expect that state policies should be effective might be the specifics of public attitudes toward the role of the state in Armenia. After the collapse of the Soviet Union of which Armenia was a part, the majority of its population continued to consider the state as a paternalistic entity in society (“Public Perceptions,” 2017). According to public expectations, the state is obliged to take care of it and, accordingly, must take necessary pandemic measures, while society does not consider itself to be an equally responsible and active participant in the measures taken. Accordingly, official statements about the pandemic, including those in SM channels, are in the spotlight of a significant part of the population. In this regard, the role of an uncertain and fast-changing information environment (accessible sources and content of information on the problem) should also be taken into consideration.

During the first months of the pandemic, people were constantly receiving diverse and often contradictory information about the virus, its origin, modes of transmission, means of protection, etc. The lack of knowledge and uncertainty of information decreases the value of each piece of information, thus making officials the most reliable sources. Such uncertainty also renders it difficult to define the majority’s opinion, which makes the spiral of silence spin in a specific way; people keep silent not because they are afraid to contradict the majority’s opinion, but because they are uncertain about what the majority really thinks.

It is interesting to see that trust toward official sources of information regarding COVID-19 as expressed by the majority of respondents is also reflected in the support for the measures taken by the Government. The same group of respondents also highly validated the steps taken by the Government in tackling the pandemic. According to data collected, 43% of respondents assessed the Government’s response to the pandemic to be the most effective and proper, while 25% of respondents thought it was effective only in the beginning and 32% criticized the state policies toward the pandemic as ineffective.

Similarly, we see the majority's support of all lockdown measures, including travel and public places bans; 38% of respondents think that these measures should be kept until the virus is neutralized, and 53% say lockdown measures should be canceled simultaneously with the decrease of confirmed cases. Only 9% think that all measures should be canceled as soon as possible. There are more supporters of all lockdown measures maintenance among women (43%) than among men (31%).

The considerable correlation between trust in the official information regarding COVID-19 (as broadcast through traditional and social media channels) and support for state policies toward the pandemic demonstrates that those consuming official information also tend to agree and demonstrate loyalty to state policies. Trust toward non-official sources of information is correlated with rather critical views of the Government, if compared to a conformist view.

The SOS effect regarding the conformity of public perception and communicative behavior as demonstratively synchronized with the official position is supported here by the findings on what the respondents say they have been doing in the pandemic. The vast majority of the respondents of our survey (67%) say they have been following official norms and rules set by the state while only a minority (20%) oppose them openly, confessing that they behaved according to their own opinion even if it contradicted the public one. Women seem to be less likely to behave according to their own opinion (14%) than men (26%) regarding the pandemic requirements, which is also an indication of the collectivist and traditionalist traits in Armenian society.

Most of the respondents assure that they have been staying home (7% say they never left home, and 60% left home only in some urgent cases); 21% say they have been leaving for a job, and only 12% say they have been leaving home whenever they wanted. Again, the majority of the surveyed Facebook users in Armenia confirm their loyalty to state COVID-19 policies and restriction rules, stating that they have been behaving accordingly.

Similar responses are received by other surveys with larger (national) sampling conducted during the pandemic, and listed here. Most of the respondents state they have been following the official requirements; 11% self-isolated and never left their homes, 46% left their homes only in case of emergency, 29% was working/studying from home, etc.<sup>12</sup>

Meanwhile, according to the numerous statements made by the prime-minister of Armenia and the Government officials responsible for tackling the virus, public behavior during the pandemic has been the main cause of the unprecedented spread of the disease. According to these statements, people avoid wearing masks and gloves and maintaining social distance; they go outside and crowd in public places in masses, etc.<sup>13</sup> As we can see from the mass survey conducted by the CRRC and listed here, a majority of respondents

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12. Public Attitudes towards the Situation around COVID-19 in Armenia; the Initiative group of the YSU Faculty of Sociology alumni network, Yerevan, 2020.

13. Remarks Delivered by Prime Minister Nikol Pashinyan at the National Assembly Debate on Declaring a State of Emergency in the Republic of Armenia. The Prime Minister of the Republic of Armenia, 16 March 2020. Available at: <https://www.primeminister.am/en/statements-and-messages/item/2020/03/16/Nikol-Pashinyan-National-Assamby/> (accessed 13 June 2020).

have been well aware about possible sanctions for the misconduct; 41% indicate administrative punishment, 10% specify criminal punishment, and 40% mention both.<sup>14</sup>

As a matter of fact, Armenia has demonstrated the highest regional infection rate, being among the countries most heavily affected by the pandemic,<sup>15</sup> which means that there has been a massive and regular violation of state rules by the Armenian population. Our everyday observations also confirm the Government's official blames everyday customs and behavioral patterns of society. Despite the high rate of transmission, Armenians mostly behaved as if there was no threat at all. They were hugging and kissing each other hello and goodbye on the streets and in offices, spending their leisure time in crowded public places such as restaurants and cafes, or visiting big family events like weddings or baptisms. Similarly, the Government representatives dealing with the threat have been spotted at public events without keeping a social distance or wearing masks.

What we are witnessing here is the majority's confirmation of their behavior as corresponding to official requirements announced through official sources of information, while in reality, the majority's behavior has actually been different and even contradictory to state policies. The majority states that it obeys the rules, but on the individual level, people do the opposite. Being under the pressure of official restrictions, those who actually violate the rules prefer not to declare it openly, either keeping silent or proclaiming their loyalty to these rules, including their answers in public polls and surveys.

Although trusting official sources of pandemic information, the majority of the population breaks the rules and restrictions; the fact of massive violations of COVID-19 official rules and restrictions, including violations by those officials who decide on these restrictions, demonstrates public misconduct during the pandemic that is similarly typical for elites and the majority of the population. The question of why people violated the rules, even while being well aware of the possible negative outcomes, and continuing their everyday customs such as hugging and kissing on the streets, visiting public places without being protected. etc., relates to other research fields like cultural anthropology, and is outside the scope of this study. On the other hand, most respondents prefer to confirm their loyalty to and agree with state rules and limitations when discussing the topic online and, in particular, addressing surveys, which directly refers to the fear of communicative isolation described by the SOS theory.

As with the fear of isolation component, the fear of virtual and/or real negative sanctions determines public behavior (including communicative behavior on virtual social network sites). According to Neubaum and Krämer, people tend to express a deviant opinion in an offline environment for unfamiliar audiences more often than they do on Facebook. The authors explain this by negative sanctions and the easiness of their application on online-based platforms (2016). In the case of Armenia, the fear of a negative

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14. Assessing the Level of Awareness About and the Impact of the Novel Coronavirus in Armenia (2020). Final Report of the Online Survey. CRRC Armenia. Available at: [http://www.crrc.am/wp-content/uploads/2019/03/COVID\\_CRRC\\_Survey\\_Final\\_Report\\_Eng.pdf](http://www.crrc.am/wp-content/uploads/2019/03/COVID_CRRC_Survey_Final_Report_Eng.pdf) (accessed 5 July 2020).

15. Corona Tracker, Armenia Overview. Available at: <https://www.coronatracker.com/country/armenia/> (accessed 12 July 2020).

communicative reaction and administrative sanctions has its role and limitations, but communicative sanctions (online) tend to prevail over administrative sanctions (offline).

Addressing the question about what the pandemic is about, the majority (58%) of respondents say that COVID-19 is a new and dangerous disease of a natural origin. Actually, this is the group of respondents who trust official sources and follow official statements. The results show that 35% of respondents say that the virus was created in labs; most of them (33%) state that the aim is to decrease the population on Earth. The statement that COVID-19 is artificially created to kill people intentionally is popular among 38% of female and 27% of male respondents in Armenia; this shows that men prefer interpretations in terms of an infodemic less than women. Next, 3% of all respondents say that Coronavirus is real, but not as dangerous as presented by the media, while 2% do not believe in the existence of the pandemic at all.

In another part of the study, we tried to describe Facebook users in Armenia as COVID-19 information sources, as well as revealing their communicative strategies and behavior. We intended to examine two factors mentioned in the theoretical part of the paper. According to the first factor, the homogenous social media environment contributes to the formation of a close circle of like-minded viewpoints, encouraging a user to express their own opinion only if it is similar to the mindset of this circle. The second hypothesis connects the communicative strategies of SM users with their striving toward self-presentation. If some users try to create a long-term positive public image relying on their SM self-presentation, they express an opinion more actively, while preferring to keep silent in the conditions of high opinion diversity in order to avoid criticism leading to isolation.

We found that the option to like/react on others' posts is the most preferable mode of constantly-practiced communicative behavior (33%) among Armenian users on Facebook in the case of COVID-19. Commenting and sharing are among the less practiced forms of online activity. Only 10% have reported that they leave comments often, while 8% said that they often share others' posts. However, 50% of those who report the prevalence of an opposite opinion among their Facebook friends avoid posting comments. Besides, 37% of those who identify the climate of opinion among their Facebook friends as rather different from the opposite one prefer not to post comments on their own, while 26% of respondents say that they are neither interested in others' opinions, nor in posting their own.

What we see here is that the majority of Armenian Facebook users prefer self-presentation to an absolutely indifferent behavior. Moreover, they prefer protective self-presentation with the aim to avoid criticism. On the other hand, the majority prefers the most passive and rather neutral way of activity such as liking and following to posting and commenting. The latter strategy is rather challenging and risky: there is an obvious portion of fear of criticism and isolation among the users who would prefer not to comment in an opinion environment, which is not only opposite but diverse.

We realized that women in Armenia are a bit less worried about their communicative reputation than men. Women are more active commenters than men (55% to 49%); they

share (54% to 52%) as well as posting and updating their status on Facebook more often than men (58% to 53%, accordingly).

However, women are less active commenters to strangers' posts (54%) than men are (67%). We tend to explain this specific by the fact that women comment more actively in their well-known and predictable environments, but refrain from experiments and risks with strangers. This type of behavior might be explained in terms of a set of unwritten rules regarding public expectations toward men and women in any traditional society. In such societies, women are more affected by some informal social control than men, including communication with strangers in general which is more controlled offline than online. What we witness online is a combination of informal public customs and SOS logic. Women are more active communicators in general, but being more affected by informal public control than men, they prefer to limit their contacts by frames of a familiar audience. The SOS logic is present here in a wider socio-cultural context.

The most preferable situation wherein the respondents are willing to discuss COVID-19-related topics is a real (offline) gathering or party (45% very likely, 32% most likely), while the least preferable situation is the SM-discussion on the pandemic with strangers (10% very likely and 12% most likely). This means that most of the users prefer not to risk their public image and online/offline reputation, while some "friends" on Facebook are friends offline. Accordingly, a group of real people (friends) at a party sounds more predictable in a sense of affinity in opinions than the unpredictable environment of virtual strangers and even virtual "friends".

## Conclusions

The paper presents the first attempt to study the communicative behavior of Facebook users in Armenia in terms of the Spiral of Silence Theory, using the actual case of COVID-19 as the popular social media topic. As a collectivist society according to Hofstede typology, Armenia demonstrates an example of communicative behavior in SM which might be applicable to other societies of this type.

The study confirms three elements of the SOS theory as applied to the communicative behavior of Facebook users in Armenia. First, we identified a gap between the majority's opinion about state policies and official requirements of public conduct during the pandemic and actual mass behavior. The majority prefers not to contradict state policies and requirements in public discussions on Facebook; they report their loyalty to the officially stated rules as well as appropriate behavior while being surveyed. On the other hand, according to the state bodies responsible for tackling the pandemic, inappropriate public behavior and massive violations of lockdown rules are considered to be the main cause for the spread of the virus in Armenia.

According to the SOS logic, people in the majority are well informed about public conduct requirements during the pandemic but do not follow them, and, being aware of sanctions, they hide their real opinion, either preferring to openly agree with the official position, or silently breaking the rules (keep silence).

Second, there is a correlation between users' perceptions regarding the opinion environment of their Facebook friends and their preference for posting on their opinion, as well as commenting on others' posts. If the communicative environment is perceived as rather contradictory to the user's opinion and as diverse in a lesser sense, the essential part of the users surveyed prefer not to post and not to comment on others' opinion (keep silence). Female Facebook users in Armenia are more active commenters than men, but their activity is mostly limited to the circle of familiar users whose opinion, compared to that of the strangers, is more predictable in advance as well as being non-threatening to their personal reputation.

Third, self-presentation is a preferable strategy of Facebook communicative activities among Armenian users who would prefer not to risk their reputation and not to put their opinion under an open and massive critique. Accordingly, in order to express their own opinions freely and comment on that of others, most of the users surveyed would prefer an offline and familiar (predictable) environment of real friends, while online communication with strangers is the least comfortable situation which would prevent Armenian users from free expression.

Being the first attempt to use the SOS theory to explore the mechanisms affecting COVID-19 public opinion in social media, the results of this survey can be useful for future studies of the public response and collective behavior in such challenging situations like a global pandemic.

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## COVID-19 в виртуальных сетевых коммуникациях: эффекты «спирали молчания»

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Основной вопрос исследования: характерна ли логика теории «спирали молчания» (Э. Ноэль-Нойман), описывающая механизмы воздействия традиционных СМИ на общественное мнение, для динамики обсуждений вопросов в виртуальных социальных сетях. В качестве актуальной темы взята пандемия COVID-19. На первом этапе полевого исследования был осуществлен вторичный анализ результатов четырех массовых социологических опросов, проведенных в Армении в период активной стадии пандемии. На втором этапе, в период

с 1 июля — по 30 августа 2020 года (самые высокие показатели пандемии в Армении) был проведен анкетный опрос на базе Google Forms среди армянских пользователей социальной сети Facebook как наиболее распространенной в стране. Было выявлено, что, будучи осведомлено об официальных ограничениях общественного поведения в условиях пандемии и зная о соответствующих санкциях за их нарушение, большинство опрошенных предпочитает публично с ними соглашаться, однако фактически им не следует, что создает диссонанс между массовой коммуникацией о COVID-19 и социальным (фактически — антисоциальным) поведением, затрудняя борьбу с пандемией. Установлена зависимость между отношением пользователей к публикуемому в социальной сети мнению «друзей» и посторонних, и предпочтением открытого выражения своего отношения, в частности, комментированием чужих постов. Самопрезентация как стратегия коммуникативного поведения пользователей в Facebook, выражается в нежелании рисковать своей репутацией и подвергать свое мнение открытой и массовой критике: воспринимая сложившуюся коммуникативную ситуацию как опасную, пользователи социальных сетей предпочитают либо соглашаться с мнением других, либо вообще не выражать свое мнение. Результаты данного исследования могут быть полезными как для дальнейшего развития теории социальных коммуникаций и ее применения в новых условиях, так и для изучения и понимания коммуникативного поведения в виртуальных социальных сетях.

*Ключевые слова:* теория «спирали молчания», социальные сети, массовые коммуникации, поведение, пандемия COVID-19, коллективистские общества, Армения, Facebook

# From Isolation to Violence: Changes of the Domestic Environment in the Iranian Family under COVID-19\*

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Domestic violence became a worldwide social problem during the outbreak of the COVID-19 pandemic, especially during the period of lockdown. It has been also experienced in some Iranian families examined in our research. The article presents the data obtained by semi-structured interviews and draws some (so-far tentative) conclusions about the nature of the changes in the regime of relations of the traditional Iranian family, including the intensification of domestic violence, and the prevailing mental/emotional violence. Among the variety of nuances in the types of violence, some of them are already well classified, such as symbolic, physical, and economic. Other manifestations of domestic violence are humiliation and verbal violence, the intensification of restrictions on (or even the interrupting of) a woman's relationship with her friends and acquaintances by her husband; the husband's violence against their children; disputes over the observance of health tips during the quarantine period, and the intensification of religious conflicts during the period of home quarantine need further study and interpretation. As theory-oriented research, it involves the study of the relationship of various types of violence, starting with the newest ones of self-violence and self-isolation, and getting through the modifications of already-known types of violence which are caused by the first type.

*Keywords:* domestic violence against woman, COVID-19 lockdown, perception of «home», emotional violence

## Introduction

Domestic violence as a pervasive and enduring problem was the subject-matter of various studies long before the pandemic of COVID-19. According to a World Health Orga-

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\* The results of the project "Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic", carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

nization estimate, approximately 1 in 3 women globally are subjected to physical and/or sexual violence by an intimate partner in their lifetime (UN Women, 2021a). Different policies enacted by governments world-wide, such as stay-at-home requirements or lockdowns, were meant to reduce the spread of the COVID-19 virus; yet, they may also have exacerbated the problem. This effect becomes particularly evident when the coronavirus pandemic intersects with the pandemic of domestic violence against women.

Dr. Tedros Adhanom Ghebreyesus, WHO Director-General, stated that “Violence against women is endemic in every country and culture, causing harm to millions of women and their families, and has been exacerbated by the COVID-19 pandemic,” adding “But unlike COVID-19, violence against women cannot be stopped with a vaccine. We can only fight it with deep-rooted and sustained efforts — by governments, communities and individuals — to change harmful attitudes, improve access to opportunities and services for women and girls, and foster healthy and mutually respectful relationships” (Ibid.).

Various women’s organizations have reported a significant increase in cases of violence against women during the COVID lockdowns. Still, the collection of detailed data of these cases was impeded by the sensitivity of the issue, the stigma and shame around the subject, as well as by definite constraints imposed by the changes in habitual life during the pandemic. The numbers vary across countries and demographics, but overall, the pandemic has increased women’s exposure to violence and diminished their feelings of safety.

We owe COVID, beyond other things, the spread of the term “self-isolation”, or even “self-imprisonment”. The place of self-isolation is often the home, which, along with the function of a safe, personal, cozy refuge, acquires the function of a prison. This transformation of the “home” into the category of what Derrida coined as “undécidables” (Derrida, 1994) (home and prison simultaneously, and neither completely home nor prison at the same time) is due not only to a change in the spatial regime crossing the boundaries of the home. The marginalization of the routine place is caused also by the change in relations between the inhabitants of the household and their changed attitudes towards the traditional domestic rights, which could be only partly explained by the compaction of space and tightness of these relations. These changes are likely to be most noticeable and sensitive where any changes are least welcomed, that is, in the traditional family where they generate mostly negative reactions.

As UN Women Executive Director Phumzile Mlambo-Ngcuka noticed, “We know that the multiple impacts of COVID-19 have triggered a “shadow pandemic” of increased reported violence of all kinds against women and girls” (UN Women, 2021a).

Still, the data on COVID cases collected by numerous organizations are not very often informative as to violence against women, since they are not sex and age disaggregated. Thus, while WHO collects COVID-19 cases and deaths data from member states, only 41 out of 236 countries, areas or territories (17%) reported sex-disaggregated data for at least 95% of cases between January, 2020, and April, 2021. Additionally, 72 countries (30%) reported sex-disaggregation for at least 70% of cases. Globally, sex-disaggregated data were

reported for over a half of all cases (51%) (WHO, 2021). Moreover, the situation is exacerbated by the fact that official national statistics on different forms of violence against women and their particularly aggravated condition under COVID is not available (this is also the case of Iran) (UN Women, 2021b).

Besides, however valuable even disaggregated data may be, they can only give a very general picture of the phenomenon of “domestic violence” without specifying the emergence of new varieties at a particular point in time and place. The research problem is therefore to adjust or supplement the statistical background with the specific qualitative data indispensable for further research of the domestic violence issue.

Thus, our research aims at providing timely evidence about the impact of the COVID-19 lockdowns on female experiences of physical and mental domestic violence in the Iranian family. Particular attention is paid to the detailed detection and description of the types of physical and mental violence, as well as on their impact on inter-marital relationships.

### Local/Country Context

Iran is an upper-middle income country with a population of 82.91 million, with 1,566.83 COVID-19 deaths per million as of December 2021 (Statista, 2021).

The specific situation created by the lockdown of some Iranian families requires special attention from social scientists and makes research into the changes in traditional family patterns as well as domestic violence particularly relevant. Domestic violence in Iran has been constantly studied in different ways and with different interpretations: these works include studies of domestic violence in cities, the abuse of local women, the risk factors of domestic violence featured for Iran, and others (see Ghazizadeh, 2005; Mousavi, Eshagian, 2005; Rasoulia et al., 2017; Rahmatian, Hosseini, 2015; Ghahari et al., 2008; Amanoolahifard et al., 2008; Malek Afzali, 2004).

The recent Iranian research on domestic violence against women (Zamani-Moghadam, Hasanvandi, 2019; Maghsoudi et al., 2015; Zare Shahabadi, Nadarpour, 2016) and other similar studies show domestic violence against women to be present in some Iranian families. The prevalence of the COVID-19 pandemic and the lockdown experience account for the increase of domestic violence, at least in some families. The results of national opinion polls in Iran support this view; inter-marital tensions show a 15.8% increase during the COVID-19 pandemic period from April 12, 2020, to April 15, 2020. People were asked, “Disagreements and quarrels have increased in some families during the lockdown. Was it a problem in your family?”. The majority of Iranians, 84%, stated that there were not many fights and lawsuits in their family due to staying at home; 15.8% said there were disputes, fights, and lawsuits in their family, while 0.2% did not answer this question.<sup>1</sup>

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1. <http://ispa.ir/Default/Details/fa/2177/>

If we take the statistical data mentioned above into account, it could be inferred that we actually deal with those (at least) 15.8–16% who reported having “disputes, fights and lawsuits in their family” in our research. Statistics, however, do not reveal the features of the phenomena; for example, do the respondents perceive and identify those “disagreements and quarrels” as “violence” at all? However, taking the challenge to specify, detail, and elaborate what exactly is meant by “violence”, whether we can refer to these 16% as to participants in violence, what kinds and nuances of it could be discerned, and what kinds of strategies are used to produce this phenomenon, we need to get immersed into the very data on domestic violence and to develop our account from these data. Thus, we arrive at the research methodology of the grounded theory.

### Data and Methodology

If the goal is to understand an environment that is less well-known or has not been clearly explored in the past, as J. Morse and L. Richard (2002) argue, it is reasonable to use the grounded theory approach. Our study also needs to understand a new environment of domestic violence under COVID-19 which is not sufficiently understood, and has not been studied in the past since the circumstances of COVID epidemic are novel; their effects on different areas of social life have not been studied in detail yet and are unpredictable. The grounded theory methodological focus on “discovering of theory from data — systematically obtained and analyzed in social research” (Glaser, Strauss, 1967: 1) makes it quite suitable for the study of (allegedly) novel forms of domestic violence, for tracing out its trends under COVID-lockdown conditions and depicting its consequences for the marital/domestic relationship in the specific context of the Iranian family.

In our study, we adhere mainly to the Straussian version of the grounded theory with just one deviation to the Charmazian version: while in the Straussian version, local issues are explored so as to then generalize in a broader context, the Charmazian version is aimed to explore local issues for the local context explication (Charmaz, 2006).

The primary data analysis technique according to this method (the Straussian version) is coding (a three-step process with three different forms, those of open coding, axial coding, and selective coding (Ostvar Namaghi, 2006; Strauss, Corbin, 1994: 22–23; Glaser, 2014). In open coding, concept-units were identified and inferred from the transcripts of interviews, then grouped into categories according to their similarities. During axial coding, categories were related to each other to obtain a more detailed picture of the phenomenon via Constant Comparative Data Analysis. In our study, we used the five-component paradigmatic model of the Straussian grounded theory: the *context* — in what circumstances (of time and place) the phenomenon appears (domestic violence by the definition has as its place home); the *causal condition* — the various events or occurrences provoking the development of a phenomenon; the *intervening condition* — effecting the causal conditions of the phenomenon so as they may facilitate, hinder, or even restrict the strategies adopted; the *strategies* — the actions performed to achieve the phenomenon, and the *consequences* — the actions/interactions sustaining the phenomenon

under study. In the selective coding stage, various inter-weavings and interconnections between these five components are organized around the central category of “domestic violence under lockdown” (Flick, von Kardoff, Streinke, 2004).

The main result of the grounded theory method implementation is a theory/idea/hypothesis on the studied phenomenon account, derived from the data analysis drawn from three-step coding and the Constant Comparative Data Analysis. In our case, this is the issue of domestic violence under specific circumstances; the first is the COVID lockdown and the second is the Iranian domestic background.

The data for our phenomenon under study was collected in the city of Chalus in the Mazandaran province located in the north of Iran and is based on 22 semi-structured interviews among women subjected to violence during COVID-19 isolation.

Informal interviews were initially used in the study to develop the concept-units. After a few initial interviews, adjustments were made to the interview questions to better assess the research phenomenon, and the categories derived from the initial interviews were followed up in subsequent interviews.

## The Sample<sup>2</sup>

The criteria for the sampling included being female, being married, having been married for at least three months, and sharing a house with a spouse/an intimate male partner.

The interviews were conducted with women who had appropriate and relatively sufficient knowledge of the subject under the study or an aspect of it.<sup>3</sup> As we sought to explore the phenomenon of violence in these interviews, we generally approached women who were either already aware of the occurrence of violence in their family environment (such as friends and acquaintances) or have had a personal experience of violence (in their mind). After the initial interviews, the “snowball” sampling provided us with access to the respondents that were their friends or acquaintances who had similar conditions in terms of domestic violence. Since we have purposefully identified families which have experienced domestic violence in the COVID lockdown period via a snowball sampling, we do not seek to extrapolate the results to all Iranian families.

## The Procedure of Interviewing

The duration of the interviews was 2 to 3 hours, and the interviews were conducted online, via social networks such as WhatsApp and Skype, or by telephone (depending on the respondent's choice), due to the prevalence of the COVID-19 virus. In a few cases, the interview was conducted in person.

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2. For the complete list of respondents, see Appendix 1.

3. While many surveys on violence against women focus specifically on women of the reproductive age (15–49), our findings reveal that we can get valuable insights also from older women (Robabeh, 52 years old, and Sedighe, 66). The evidence which can be inferred from the research results is that age does not protect from violence.

The time of the interview was chosen by the respondent and, in some cases, the interview was conducted more than once and at intervals determined by the respondent.

Respondents usually chose the time for the interview themselves, like when their spouse/partner was not at home so to have complete freedom to talk. Respondents were reassured that the information on their identity was protected, and that pseudonyms were used in the research. Interviews were recorded in handwriting during the communication, or immediately after the interview, and, in the rare cases when the respondent allowed us to record her voice, the audio was recorded.<sup>4</sup>

We continued interviewing until we reached theoretical saturation,<sup>5</sup> which means that the analysis of data reached such a point that sampling more data will not lead to more information related to the phenomenon under research. In a definition by J. Morse (2004: 1124), “theoretical saturation” refers to “the phase of qualitative data analysis in which the researcher has continued sampling and analyzing data until no new data appear and all concepts of the theory are well-developed . . . and their linkages to other concepts are clearly described”.

Although the researchers have still not agreed on a rigorously verified method of identifying “how much is enough”, we sought to adhere to Morse’s recommendation that qualitative researchers (grounded theory theorists included) use certain strategies to achieve data saturation and rigor such as “prolonged engagement, persistent observation, and thick, rich description; inter-rater reliability, negative case analysis; peer review or debriefing; clarifying researcher bias; member checking; external audits, and triangulation” (Morse, 2015). One of the significant factors that influence the researchers’ decision to stop data collection at data saturation is the factor of the sample. This factor also guided our understanding of theoretical saturation: homogeneous and experienced participants in the research topic need fewer interviews and may reach saturation faster than a heterogeneous sample with less-experienced participants.

Although we managed to achieve theoretical saturation during the 14 interviews,<sup>6</sup> we increased the number of interviews up to 22 for a more reliable data analysis. Although the questions were related to the domestic situation during the outbreak of the COVID-19 pandemic, the challenges that women face in their marital relationships, the manner/type of violence, the very perception of violence and so on were perdurable to some extent.

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4. It became usual for the survey practices to stress that telephone interviews invoke multiple challenges and limitations (see, for example, Tourangeau, Yan, 2007) people are known to underreport when directly asked about sensitive topics, respondents might not have enough privacy to answer questions sincerely, especially in overcrowded homes, inability over the telephone to see visual signs of distress and body-glosses, finally, asking questions about domestic violence may pose for already stressed individuals more strain that requires a response from the interviewer. Still, under the COVID-19 regulations distant forms of interviewing seem to be more welcomed than none at all.

5. For the critical discussion on the concept, see, for example, Aldiabat, Le Navenec, 2018; Bowen, 2008; Guest, Bunce, Johnson, 2006; O’Reilly, Parker, 2012.

6. “Meaning saturation” in terms of Hennink, Kaiser, and Marconi (2016) can be reached in 16–24 interviews. Guest, Bunce, and Johnson in “How Many Interviews are Enough? An Experiment with Data Saturation and Variability” (2006) indicate that data saturation can be reached with the first twelve interviews.

After the interviews were transcribed, they were analyzed through three stages of open, axial, and selective coding to get an idea on the central category and supporting categories. In this study, while making the necessary efforts to ensure the number of interviews to achieve theoretical saturation, we tried to increase the validity of the research by the method of “validation through members”, asking the respondents’ opinions about the findings and interpretations made by the researcher. For this purpose, the findings of the interview were delivered to the respondents and corrected taking into consideration their opinions after the end of each interview.

## The Framework of Analysis and Results

On the whole, the obtained results of the three-stage coding revealed that the consequences of the stay-at-home policies under COVID-19 were particularly severe for psychological/emotional/mental well-being. It is a paradox of sorts that ensuring physical health security entails emotional problems and feelings of insecurity. The very isolation and encapsulation of women in their houses upended their lives and put them under stress not only for their physical well-being. Their exposure to physical violence was compounded by violent emotional impacts that made their stay at home much worse.

According to the recent UN Women survey which covered 13 countries across the world, the most widespread form of violence is verbal abuse (50%), followed by sexual harassment (40%), physical abuse (36%), denial of basic needs (35%), and the denial of the means of communication (30%). Seven in 10 women surveyed believe violence against women is common in their community (UN Women, 2021c).

Women who reported direct or indirect experiences of violence and feeling unsafe at home in pre-COVID times are more likely to say that COVID has worsened their feelings of stress and anxiety (as to the UN Women survey, 2021); moreover, they also experience the inability to stop worrying, being afraid, and a lack of interest in doing things. The main type of violence under lockdown reported by women was emotional abuse (80.8%); the rate of this type was always higher than other types of abuse (Rasoulilian et al., 2017: e4280).

The findings of our study (in the Iranian family context) support the general statistics tracing the predominance of emotional/mental violence in domestic violence in general. However, just as with statistics on domestic violence in general, statistics on emotional/mental violence do not reveal a specific picture of this type of domestic violence, such as its local nature, its dynamics in the particular setting of the COVID lockdown, or its long- or short-term consequences on the relationships of those involved.

The overall frame of reference resulted from the coding and grounding the main idea of the research is presented in the Figure 1.

The account of the data analysis can start with the external (in relation to family/household) prerequisites of domestic violence such as the COVID lockdown, and proceeds to the inner altered-relationship that finally arrives at violence (physical or mental)<sup>7</sup>

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7. For the source of theoretically calibrated violence typology see: Galtung, 1969, 1990.

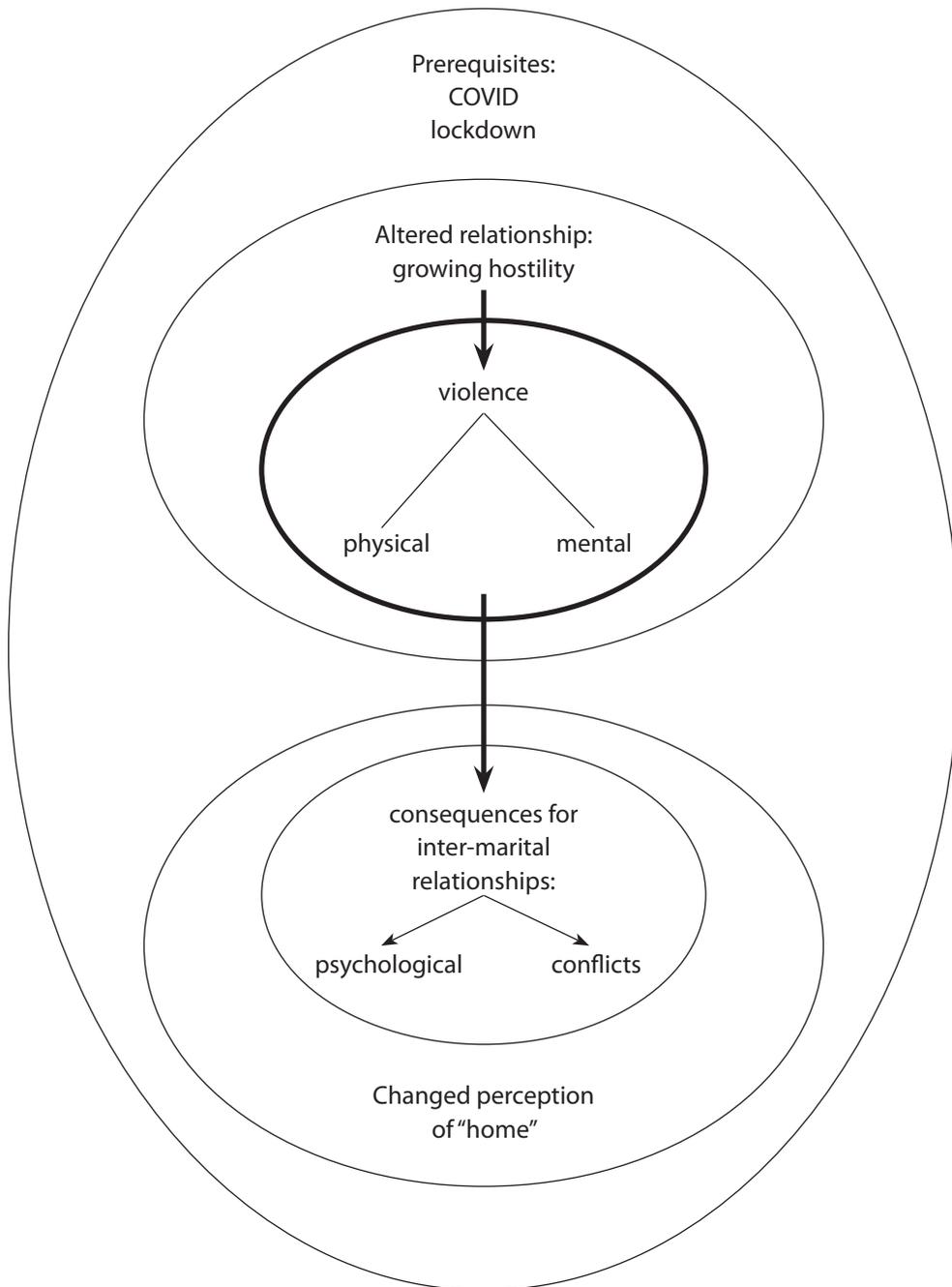


Fig. 1. Domestic violence under the COVID19 lockdown in Iranian families (and its consequences for inter-marital interactions)

that also has long- or short-term consequences for the inter-marital relationship (which can be deep psychological or enacted conflicts) known as “home”.

The main types of violence in the emotionally stressful situation at home are the growing hostility, the frustration in trying to set up a sanitary, safe habitat, the emotional abuse, and humiliation, all having serious consequences for the inter-marital relationship. Thus, the emotional/mental violence (as to Figure 1) resides in a “growing hostility” as the altered relationship, in “mental/emotional violence” per se (as a momentary act), and in the “psychological consequences for inter-marital relationships”. They revealed concept-units that grounded the developed idea of the framework of analysis for domestic violence (under COVID lockdown in Iranian families) as shown in Figure 1, as well as the prevalence of mental/emotional violence. The concept-units are as follows:

#### **Altered inter-marital relationship — growing hostility:**

For the man, it is leaving home, with an indifference to the responsibilities and a deliberate disregard for social distance; a lack of personal hygiene and not paying attention to the coronavirus; the preference of male friends over the spouse and children; the man’s lordly encounter with his wife at home; the lack of hygiene by the man as a weapon to harass the woman; the observance of hygienic conditions provided that the woman is completely obedient at home; cutting ties with the family and leaving the woman alone to take care of the children; the man’s lack of cooperation in domestic affairs, despite not going to work; the man’s lack of cooperation in handling the care for children; increasing female household chores due to food disinfection and healthier food preparation; challenges due to spousal irresponsibility and selfishness; and by reducing women’s economic authority during the quarantine period.

#### **Violence:**

*Physical:* beating, sexual harassment, forcing and pressuring a woman to have sex, slapping, or throwing a cell phone at a spouse, bruising the wife’s hand; putting a woman under house arrest and the shopping is done by a man; does not allow the woman to leave the house even for a few minutes; the husband’s violence against their children.

*Mental:* restrictions on a woman’s relationship with her friends by her husband, interrupting a woman’s relationship with her friends and acquaintances, controlling women’s activities in cyberspace with the presence of more men at home during the quarantine period; female ridicule for a fear of coronavirus, the husband’s obscenities and verbal abuses, abuse with corona virus content, constant outbursts of anger at a woman’s usual behavior at home, the husband’s objections and unreasonable abuses, the threat of violence, threatening a woman with divorce, or the demand of obedience and servitude.

#### **Consequences for the inter-marital relationship:**

*Psychological:* emotional distancing; the decision to divorce after Coronavirus, a distrust of the spouse; fear and anxiety caused by the coronavirus; increased anger and resentment of the man due to financial pressure and its transfer to the spouse.

*Conflicts:* Reminder of previous family disputes caused by the man; religious conflicts and their escalation; the previous disputes over the families of the parties are highlighted; transferring male and female conflicts to the children in the family; increased economic disputes between the husband and wife due to male unemployment during the lockdown period, and the assignment of home expenses management from the woman to the man and then arguing for this reason.

See the detailed distribution of the coding results of violence concept-units by the pivotal and comprehensive codes/categories accompanied by the interview cases' citations in Appendix 2.

The idea/theory which could be inferred from the data analysis in our research is that domestic violence under lockdown turns a home from a "shelter" into a dangerous place to stay (or at least adds this quality to "home").

How does it happen, or, rather, proceed to this outcome?

*Lockdown as a prerequisite* means, above all, the prolonged (offbeat) co-presence on a delimited space of home, and, consequently, the change in the temporal/spatial experiencing of interactions between family members, or those experiencing intimacy.

This kind of co-presence entails a *change in intimacy* (as it is understood as a feature of a primary group) regime of more-than-usual dense everyday interaction, and fewer-than-usual opportunities for distancing in the case of emergency.

The surplus of forced intimacy makes for more-than-usual frequency of emotional strain, abuse, frustration, quarrels, slurs, accusations, etc., that is, *growing hostility*, to summarize.

Growing hostility *cumulates into emotional/mental violence*, which in contrast to physical violence (instantaneous event/act) is prolonged in its nature; it is a process of pressure, bullying, ridicule, etc., which creates an *atmosphere of violence* (which in turn can provoke physical violence as well).

The atmosphere of emotional violence at *home* (or at least, the addition of this kind of mood to the home milieu) turns it into the kind of a *heterotopia*; it is now not a refuge, or "sweet home", or a shelter, etc., but an undesirable and dangerous place to stay.

Some consequences of staying in such a domestic environment are not hard to anticipate, such as the change in the marital relationship that threatens its sustainability and can even end in divorce (the possibility of this outcome is backed up by the data obtained from the interviews).

Why is this theory derived as a grounded theory, and dependent on the nature and content of the empirical data? If the central category/phenomenon is "domestic violence during lockdown", the unknowns are specific cases of this violence in the particular setting of the Iranian family under lockdown. As data is collected and openly coded, we get a range of categories that further on (by axial coding) give us comprehensive categories of "emotional/mental violence", that is dominant in relation to "physical violence" (this

could have been only inferred from the data). The iteration of the interviewing (going back to the respondents' accounts of the acquired idea for the "emotional violence" category) gives evidence that "emotional violence" has been experienced as a prolonged process, a sort of "liquid violence", and is associated strongly with the space of home.

Categories (comprehensive codes as the result of selective coding, see Appendix 2) of "emotional violence" are: humiliation and verbal abuse; psychological violence; performing male domination and restrictions on women; the challenge focusing on the spouse's family; irresponsibility and carelessness at home; disputes over the observance of health tips during the lockdown period, and the intensification of religious conflicts during the period of lockdown.

These categories were used to refine and specify "emotional/mental violence" in the second iteration of interviewing. As an outcome of the open coding, the specified emotional/mental violence' concept-units list of emotional/mental violence' categories was created (see Appendix 3).

## Conclusion

Findings inferred from our study show an increase in domestic violence (psychological/mental and emotional particularly) since the beginning of the COVID-19 stay-at-home requirements. The main outcomes of the study could be summed up in two findings. First, a detailed account of emotional/mental violence in Iranian families/homes during (and due to) COVID-19 lockdown was presented. The list of these categories can become the background for the further emotional domestic violence study since the very list could be refined and developed according to the local environment. Second, the idea of the reference between emotional/mental violence and the transformation of the "home" notion and perception was proposed for further development.

It must be said, however, that these interviews do not reflect the situation of the Iranian family in general. In many Iranian families, especially of the middle and upper class where women have access to educational and supportive resources and facilities, there is dialogue, interaction, and a relatively equal relationship. These interviews are about families with a history of domestic violence against women by men, and we do not seek to generalize the results to all Iranian families.

However, we consider that the results of this research provide a viable solution to the problem of missing information on domestic-violence sensitive topics during the COVID-19 pandemic.

**Appendix 1. The List of Respondents<sup>8</sup>**

Nº	Name	Age	Employment status	Duration of marriage in years	Number of children
1	Mina	28	Unemployed	2	1
2	Golnaz	30	Unemployed	5	1
3	Nazanin	31	Unemployed	2	1
4	Robabeh	52	Unemployed	30	3
5	Parisa	32	Unemployed	8	1
6	Fereshteh	46	Unemployed	20	2
7	Susan	29	Unemployed	4	1
8	Nahid	27	Unemployed	3	1
9	Nazi	38	Unemployed	15	1
10	Sara	36	Unemployed	10	1
11	Fatemeh	38	Unemployed	17	1
12	Negar	47	Unemployed	20	2
13	Neda	28	Unemployed	3	0
14	Sanaz	39	Unemployed	9	2
15	Robabeh	24	Unemployed	2	1
16	Samaneh	39	Unemployed	12	1
17	Nastaran	25	Unemployed	1	2
18	Negar	39	Unemployed	4	2
19	Sogand	33	Unemployed	4	1
20	Sedighe	66	Unemployed	41	5
21	Mobina	45	Employed (tailor)	30	3
22	Soodabeh	31	Unemployed	3	0

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8. For ethical reasons and to preserve anonymity, pseudonyms are used to list respondents.

## Appendix 2. The Distribution of DV Concept-Units by the Categories — Pivotal and Comprehensive Codes — with Excerpts from the Interviews<sup>9</sup>

Concepts (supporting codes)	Categories (pivotal codes)	Categories (comprehensive codes)
Female ridicule for fear of coronavirus, the husband's obscenities and verbal insults; Forcing and pressuring a woman to have sex and not being accepted by a woman for fear of coronavirus; Insults with corona virus content, constant and unreasonable anger at a woman's normal behavior at home; Husband's objection and unreasonable insults; Threat of violence and beatings by men, Threatening a woman with divorce; Reminder of previous family disputes by the man.	Cursing, humiliating, and threatening woman; insulting the spouse's family.	Humiliation and verbal abuse.

**Negar**, 47: *We have been using the pocket (savings) for two months now, sometimes I tell her (husband) why don't you go to work? He got angry and shouted angrily, which idiot goes out to work in coronavirus conditions??? I tell him what will you do if the coronavirus runs out? He says I will not go to work until you die of hunger. I like to do this (a kind of stubbornness of the husband and psychological harassment of the wife). In a way, I will ruin you so that you do not command or forbid me anymore.*

**Neda**, 28 years old without children. Her husband has a market job and a diploma (low). *My husband is a carefree person. Ever since the coronavirus was born, he has always ridiculed me for being afraid of the disease. Coronavirus has become a means of entertainment for my husband to laugh at me and make fun of me.*

**Nazanin**, 30, has two children. She talks about the natural process of doing housework, which causes her husband to get angry and find fault. She says: *My husband complains about the housework and how it is done because of quarantine and constant presence in the house. He tells me "you are noisy, and you are boring". It is as if staying at home makes him nervous and he pours this anger on me.*

**Sanaz**, 39, says her differences with her spouse have intensified: *We already had a disagreement and it was not that big. Now that he (her husband) has to stay at home, there*

9. Original wording, and abruptions in speech were preserved.

*are many more disputes and he constantly threatens me with divorce, because he knows that I am afraid of divorce.*

**Fatemeh**, 38, complains about her husband's constant presence in the house: *Corona has become an incurable pain for our lives. The misfortunes began when the coronavirus came. What can a man who stays at home have but a headache? Men, if they stay home longer than a certain time, or if they are not tired and wake up in the morning, do not know how to talk to their wives properly, help you and have nothing for you but trouble.*

Preference of friends over women and children by men; lack of hygiene by the man as a weapon to harass the woman; observance of hygienic conditions provided that the woman is completely obedient at home; increased feelings of abuse and misbehavior; looking at your spouse like a servant; the demand of obedience and servitude; the man's lordly encounter with his wife at home.

Indifference and ignoring women; expecting absolute obedience; abuse.

Psychological violence.

**Robabeh**: *My husband does not wear a mask at all. I give him a mask, he puts it in his pocket. Does not use and is carefree. While he is shopping, I tell him to put on the mask, he tells me to go out of the house and put on the mask. But I look at him slowly and see that he is not wearing a mask. When he returns, we will fight. I tell him are you kidding me? Why are you lying?! I said why don't you use gloves? he said I don't have gloves. I gave him my gloves, once I did not see him use gloves. It made me crazy and rebellious.*

**Samaneh**: With regret for being alone and being forced to stay at home, she says: *Nader (husband) spends all his time outside the house and having fun with his friends, and it has become a good excuse for him that he is a coronavirus and he will not let me. Let me go out with him. He lies to me that he goes out to buy a house, but I know he is having fun with his friends without paying any attention to the dangers of coronavirus.*

**Nastaran** says that her husband wants her to become a completely submissive woman: *He wants me to do everything she tells him to do. He has taken time off from work and stayed at home for me to serve him. If I had known him like this, I would not have married him. Before this disease (coronavirus) he went to work and came home, he did not have much contact with me and he got tired and slept. This staying at home made me know him better. Incidentally, Coronavirus was very lucky for me because it made me know him and know how violent and selfish this person is.*

<p>The intensification of restrictions on a woman's relationship with her friends by her husband; interrupting a woman's relationship with her friends and acquaintances; controlling women's activities in cyberspace with the presence of more men at home during the quarantine period; female house arrest and shopping by a man; does not allow the woman to leave the house even for a few minutes; Coronavirus is a good excuse for male domination at home.</p>	<p>Male overlordship, control and repression; restrictions and supervision of women; the intensification of restrictions on a woman's relationship with her friends by her husband; interrupting a woman's relationship with her friends and acquaintances.</p>	<p>Performing male domination and restrictions on women.</p>
<p><b>Negar:</b> <i>He does not allow me to leave the house. In the evenings he goes by himself, buys bread and supplies, and returns. Well, In this way, he can leave the house for at least a few hours and be in a better mood. He does not allow me to even walk in a secluded place under the pretext that the disease is dangerous. This is an excuse to bully him. I'm getting depressed. I can easily understand that my nerves are sick. I rotted.</i></p> <p><b>Sogand</b> speaks of restricting her from her friends: <i>My husband is a shopkeeper in the market. That's why he has to go to the store in the morning and in the afternoon. Corona caused us to close the shop for about 2 weeks and stay at home together during the quarantine. When my husband went to his shop, I had a group with my friends, and we went for a walk and had fun. He has been monitoring me since he had to stay at home. He does not allow me to go out with my friends and complains about why I have been leaving the house so much before. He picks up my phone and is suspicious. Because he is unemployed, he is in prison-like a prison guard, he is constantly paying attention to me and does not even let me leave the house.</i></p> <p><b>Neda</b> is a newly married woman who talks about giving orders to her husband and severely restricting him at home: <i>My husband is afraid of everything. He thinks he is wiser than me and does not get the Coronavirus, and he does all the work outside the house, including his own purchase, and he told me that I have no right to leave the house. I do not dare to leave the house. Although this seems like a sacrifice, I need to go out with him for at least a few minutes, and he won't let me. I have been captured and because he has some harsh morals, if I argue with him, I am sure he will fight.</i></p> <p><b>Golnaz</b> says that her husband is suspicious and has excuses for monitoring the mobile phone: <i>Hamid did not doubt me before and he trusted me a lot. Ever since he was forced to stay home because of the coronavirus, he has always had negative thoughts. He constantly</i></p>		

<p><i>secretly picks up my phone and checks my Instagram and Telegram pages. He even once told me directly not to chat with anyone (a stranger boy) one day and I did not know. I was so upset that I told my family, and he would apologize for not being in a balanced mood due to the epidemic. Staying at home has made him think very negatively and slander me for no reason.</i></p>		
Slapping his wife; throwing a cell phone at a spouse; bruising the wife's hand.	Violent quarrel, mayhem with women.	Physical violence.
<p><b>Susan</b>, a 29-year-old woman who got married at the age of 19, and exposes her husband's physical violence during the coronavirus, says: <i>For fear of the coronavirus, he constantly tells me to make tea, make boiling water and herbal tea, he does not help me in anything. I just did not do this for him for one day, he hit me hard on the back with a teapot of tea and said that he was so awkward that you could not make tea, you deliberately wanted me to die. Damn this coronavirus, I have been beaten twice by my husband because he was obsessed with cleaning, I washed the fruit once and he is very insistent that I wash all the tools and fruits thoroughly with detergent, some fruits like grapes must not be washed with dishwashing detergent, Because it spoils the fruit, I do not know what problem he had in washing the grape, which pulled my hair and said how much I emphasize to you, wash the fruits carefully, you probably want to kill us.</i></p> <p><i>Because alcohol is expensive, we have to disinfect equipment and handles with ordinary, inexpensive detergents, says Sarah about disinfecting door handles and shoes. I did not know that this detergent would damage the shoes, and I usually disinfected them for fear that the shoes would become contaminated. One morning when I was asleep and my husband saw his shoes, his shoes were broken and the soles of his shoes were torn off. He woke me up with a kick and slapped me gently. He said, "Do you not have the wisdom to ruin your shoes easily?" I had just bought these shoes. You disinfect your whole life every day with obsessive-compulsive disorder and the bad smell of this detergent causes us headaches every day.</i></p>		
Male discrimination on the basis of social distance between one's family and one's spouse's family; the previous disputes over the families of the parties are highlighted; cutting ties with the family and leaving the woman alone to take care of the children; transferring male and female conflicts to the children in the family; the husband's violence against children.	Discrimination in family relationships; the husband's violence against children.	Challenging the focus on the spouse's family

**Nazi:** *Before the outbreak of the coronavirus, I could easily take care of the children and leave them at my mother's house, and I could easily go to work myself. I can no longer do this. I am afraid that my children will transmit the Coronavirus to my elderly mother and father. Instead of working with me, my husband constantly argues with me to stay home and take care of the children and not go to work. He always wanted an excuse to prevent me from working. Now, this coronavirus has become a strong excuse for him to ask me to stop working and do housekeeping.*

**Mobina** describes a very bitter incident that was the source of her intense disagreement with her husband: *I am very aware of the coronavirus and I wear a mask wherever I go. We went to my mother-in-law's house for a party one night. We both wore masks. My mother-in-law took a corona three days after we went home. Thank God he is better. My husband slandered me without any reason or evidence that I must have transmitted the virus to his mother because I already had a cold and did not really have the Coronavirus. For this reason, he blamed me for his mother's illness, and I argued with him, and he beat me severely.*

The man's lack of cooperation in domestic affairs, despite not going to work; the man's lack of cooperation in handling the children's homework; increasing female household chores due to food disinfection and healthier food preparation; challenges due to spouse irresponsibility and selfishness.

Unfair homework division; men's irresponsibility in housework; men's lack of cooperation in homework.

Performing men's irresponsibility and carelessness at home.

**Negar:** *At the moment, you have to disinfect every purchase you make according to the order of health officials. As usual, I have to alcoholize and disinfect everything alone and without help. Although my husband (Navid) is more sensitive to health than I am, he himself does not do anything, he only orders Negar to wash it and Negar to wash it. It even goes so far as to buy chips and packaged food for the kids, I have to disinfect with alcohol. And he does not do this small thing. Disinfecting green fruits is a hassle. Previously, we easily washed the fruits with water and put them in the refrigerator. Now we have to wash the fruits and vegetables or dishwashing liquid, then rinse them and leave them in the refrigerator.*

**Nazanin:** *In this situation and the epidemic of the virus, we have to disinfect everything in life. So much (Vitex) (name cheap and harmful detergent) to the door handles and stairs, shoes, cell phones and everything we use that my other lungs are damaged and I cough. Babak (her husband) does not help me even once and I do everything alone. He is very carefree and is not afraid of anything. He tells you that you are very cowardly, so clean everything yourself. It has nothing to do with me. In addition, sometimes he argues with me that the house smells of detergent.*

<p><b>Sara</b> has similar views with Nazanin: <i>Instead of helping me and being cautious, Mr. (husband) causes me torment and constantly complains about why you wash the fruits so much, why you disinfect the sink so much, On the one hand, I have to work at home and worry about my own health and that of my child, and on the other hand, I have to endure my husband's Murmuring and complaining for hygiene. I really can no longer.</i></p>		
<p>The lack of hygiene by men during the coronavirus; the failure to follow hygiene tips when shopping outdoors and excessive stress on the spouse due to the negligence of the husband; the failure of the man to observing social distance during the quarantine period;</p>	<p>Ignoring the dangers of coronavirus by the husband; men neglect to observe health tips and argue with their spouse.</p>	<p>Disputes over the observance of health tips during the lockdown period.</p>
<p><b>Mina:</b> <i>My husband does not take good care of his hygiene. When he goes shopping, he goes out and comes back, I have a lot of stress. He touches everything in the house. It does not put bread in the cloth. Take the purchased plastic and utensils inside the house if those plastics are very dirty and contaminated. When he comes home, the child goes to him and hugs the child without changing his clothes and washing his hands, all these things are driving me crazy. I have to be careful that he comes home, I put his belongings somewhere so that the child does not touch them and force him to observe hygiene.</i></p> <p><b>Fatemeh</b> arguing with her husband: <i>We went shopping together for our needs in the market because of her husband's negligence. First, he was hardly content to wear a mask. I wear two masks wherever I go and I am very careful. He was picking fruit from the box and put his hand to his nose as he picked Portugal. I warned him, but he insulted me in front of the seller and I was very embarrassed.</i></p>		
<p>Woman arguing with her husband over not praying for Coronavirus to disappear; feeling closer to God by the woman and the man mocking her; increased religious differences.</p>	<p>Dual-God believing couple.</p>	<p>Intensification of religious conflicts during the period of home lockdown.</p>
<p><b>Samaneh:</b> <i>I believe in God a lot and I pray a lot, especially during the Viruscrona era, because I believe that God can take care of me and my family. But Saeed is not very important to him and he mocks me that your prayers are useless.</i></p> <p><b>Nahid:</b> <i>My husband is very religious. During this quarantine period, he argues with me a lot about why I do not pray as much as he does. He used to argue many times that you do not pray at all. Now in Corona, he expects me to vow and need from morning till night. He intervenes constantly and tells me that because you do not have much faith and do not pray, we will get the Coronavirus.</i></p>		

<p>Increased economic disputes between husband and wife due to male unemployment during the quarantine period; male domination due to the economic dependence of women and children on men; increased anger and resentment of the man due to financial pressure and its transfer to the spouse; providing for the family's livelihood by the woman and blaming her by her husband for staying at home; the assignment of home expenses management from the woman to the man and arguing with women for this reason; reducing women's economic authority during the quarantine period.</p>	<p>Reducing women's economic authority; Economic conflicts and changing the cost pattern at home.</p>	<p>Economic challenges.</p>
<p><b>Sedighe:</b> <i>Coronavirus ruined our lives. My husband is Weekly peddling. Doesn't anyone think about how to pay for a family? I see we have no money, I get angry, I say something to him and he says something in response. We do not have a problem with each other, but since the coronavirus came and my husband could not work, he has become very nervous and angry. I can't even talk to him for five minutes and I'm scared. His morals have changed completely since the day he became unemployed.</i></p> <p><b>Sanaz</b> says that her husband is angry because of unemployment and this anger is dragged into the house: <i>Due to quarantine, Manouchehr has not been able to go to work several times so far. He owns a small sandwich shop. He is angry because they Compulsory closure and say you should stay at home, and he pours this anger on me as if I am to blame for the situation.</i></p> <p><b>Nazi</b>, 34 years old and has one child: <i>From the day the quarantine was imposed, the store manager told me that because the shop was closed, they could no longer pay us, and I lost my job. My husband now uses this as an excuse to say that I am a free eater and they pay for the family alone, and he constantly puts his money on me.</i></p>		

### Appendix 3. Domestic Emotional/Mental Violence Concept-Units Featured by the COVID-19 Lockdown (Illustrated by the Excerpts from Interviews)<sup>10</sup>

#### Feelings of sadness, depression, and routine life during the lockdown:

*Mina:* I was always very happy near the transition to the New Year, even though I had a lot of work to do, but this year it became a Coronavirus, and I was feeling tired even though

10. Original wording, and abruptions in speech were preserved.

I had not prepared myself for any travel or party. It is as if I did a lot of hard work! Two or three weeks before the New Year, I was in a state of despair at home. I was nervous. I was not motivated.

**Increased feelings of loneliness in married women during the lockdown:**

*Mina:* My husband was always self-involvement, sleep late at night and waking up early in the morning. It seems not to be at home, and I felt only this kid and me existed in this house. Only his body was here.

**Doubled female stress (corona stress + the stress of lower personal sanitation by the man):**

*Mina:* Early in the quarantine, my husband said that I have a few clients and I would go to work. I had stressed all time when he went out a few times and come back, I thought and asked myself he is currently in contact with several people. If anyone has a disease, what do I do? We have a small child. The baby's lungs are sensitive and if getting sick. What do I do? My husband does not consider personal sanitation. He does not put alcohol in his car and He does not pay attention to the mask and constantly loses it. This behavior has driven me to the brink of insanity.

**Decreased and reluctant sex:**

*Golnaz:* I am no longer in the mood. Now, who has the mood to give sexual services to her husband? They think about their goals in sex. Men only think about themselves in sex.

*Nazanin:* Before the coronavirus came, we did not have much sex. Now that the coronavirus has spread, my husband has no sexual desire for me and says we should not sleep too much together because it is dangerous. It is interesting that the man himself goes out of the house and is afraid of me while I am always at home and I do not go anywhere. Isn't this interesting to you.

**Lack of cooperation of men in household affairs despite leaving their jobs:**

*Robabeh:* Where was the help! My husband does not do anything at home. He used to go to work and say I was tired. Even now, despite being unemployed at home, he is used to being lazy. He is just napping. I have to do everything myself. He gives orders and always expects me to serve him. Only the gentleman should give the order and I should obey.

**Challenges of husband's irresponsibility and selfishness:**

*Parisa:* Saeed (my husband) always went in front of the house and stood or walked and came back and it did not matter to him at all that there was a coronavirus and it was very dangerous. I was arguing with him. I told him why do you go out? He said I was bored. I feel better when I go out. When he returned home, he often forgot to wash his hands. He does pay no attention to anything. So when he came to the house, I sprayed (disinfectant)

everywhere to clean it. All parts of the house. And I had no right to tell him to take care of his personal hygiene.

**Lack of hygiene by men during the lockdown:**

*Robabeh:* He does not understand what hygiene is at all. It only bothers me. It is self-opinion and selfishness about observing human personal health, and this will cause us to argue and fight with each other so, that he will be persuaded to wash his hands. Sometimes he deceives me and only washes his hands with water and does not use sanitizing liquid. To deceive me, he shows me his wet hands and says, Look, I'm washed and cleaned, he is lying.

**Husband refrains from observing social distance at home during being ill:**

*Robabeh:* My husband had a cold. As a precaution against coronavirus, I had separated the dishes. But he did not care and ate in our food containers. I told him not to get too close to the children at the moment, maybe you have coronavirus, he was stubborn and deliberately approached the children and said that the children do not get coronavirus.

**Reminders of past family disputes by the man due to quarantine and long hours at home:**

*Robabeh:* Since he was forced to stay at home due to quarantine, he only criticizes me, he has reminders of what differences he had with my father and brother before. When a man sits idle and stays at home, he to bite like a dog (A term used to describe that her husband is constantly harassing her).

**Increased economic disputes between husband and wife due to male unemployment during the lockdown:**

*Nahid:* You know that my husband's job is photography. Under normal circumstances, he did not have many customers, he was going bankrupt. Now that Coronavirus has arrived and is closed everywhere, things have gotten worse. It is not clear how we should pay the bank loan installments. I am more worried and my husband is very carefree. It is my right to grumble and argue with him because we have no money to support the family.

*Nazi:* If I just argue with him for a while, he will not pay for the house, he will not pay for the children. He says that it is enough that no matter how much I pay for the house, your tongue is outstretched (correction means that you have become obscene and Peruvian). Now we have to be silent and say nothing. The coronavirus also became an excuse for not giving me any more money.

**Severe restrictions on a woman's relationship with her family and friends:**

*Sara:* Coronavirus has become my husband's excuse for taking everything from me. I do not even dare to call my man, he says how often do you call. Do you know how much money is charged? I used to be able to walk down the alley with the lady next door, but now she won't let me. He says it is a coronavirus and you have no right to go out.

**Control of female activities in cyberspace with the more male presence at home during the lockdown:**

*Fateme*: You know what I mean, something that is logical does not upset anyone. For example, if I were a woman who did not cook, I would make him angry and not do my homework, He had the right to restrict me and tell me not to go out. When I do all this work, why not let me go out? Why not let me talk to someone on the phone? Supervised at home and as if he is my control agent, I can not send a message in Telegram, I am not allowed to send a message in WhatsApp. Why does he take what is my right from me? I do obey him because there should always be fights. At the same interview that you wanted to do, you saw how many times you called and said I could not speak because I was afraid, he would slander me.

**Male discrimination in the field of social distance between his family and his wife's family:**

*Negar*: During the quarantine, it was decided that none of us should go to the family home and spend the holidays at home. He told me that you are not allowed to go to your family home. While he was visiting his family every day alone under the pretext of shopping, and I realized this. There were fights between us and insults were exchanged between us. He talks irrationally. He said that my mother's house was close, that I had gone and that I had not entered the house. I also said that I will not go inside my mother's house, but I want to see her.

*Soodabeh*: My husband even wanted to go to his father's house at a time when the coronavirus outbreak has increased and is closed everywhere. He invites his brothers to our house. How does he have the right to do this, but I have no right to do this at all? It seems that only he loves his family and I do not love my family. He is very selfish and pushy.

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*Svetlana Bankovskaya*: Conceptualization, methodology, writing of the final draft, writing of the review and editing.

*Javad Maddahi*: Conceptualization, methodology, data analysis, data transcription, writing the original draft, translation from Farsi into English.

*Tahereh Lotfi Khachki*: Sampling, interviewing, recording interviews, transcribing, writing of the original draft, translation from Farsi into English.

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## От изоляции к насилию: изменения домашней среды в иранской семье в условиях COVID-19

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Домашнее насилие стало глобальной социальной проблемой во время вспышки пандемии COVID-19, особенно в период изоляции. Насилие стало проблемой и для некоторых иранских семей. В статье представлены данные, полученные в ходе полуструктурированных интервью, и сделаны некоторые (пока предварительные) выводы о характере изменений в режиме отношений традиционной иранской семьи, включая усиление домашнего насилия и преобладание насилия ментального/эмоционального, а также изменения в восприятии своего «дома» в новых условиях изоляции и насилия. Все многообразие видов насилия отчасти уже хорошо классифицировано, например, символическое, физическое и экономическое. Другие проявления домашнего насилия, такие как унижение и вербальное насилие, усиление ограничений (или даже запрет) на отношения женщины с друзьями и знакомыми, насилие мужа над детьми, споры о соблюдении санитарных норм во время изоляции, усиление религиозных конфликтов в период домашнего карантина и др., требуют более пристального изучения и интерпретации. Как теоретико-ориентированное исследование, эта работа показывает взаимосвязь различных видов насилия между собой, в том числе, специфичных для периода пандемии — самонасилия и самоизоляции, — их трансформации в эмоциональное насилие, которое обуславливает модификацию «дома» в гетеротопичное (амбивалентное) пространство — не только «свое» пространство, «убежище», но и опасное место, враждебная среда.

*Ключевые слова:* домашнее насилие против женщины, изоляция в период эпидемии, восприятие «дома», эмоциональное насилие

# The Impact of the COVID-19 Pandemic on Public Transport Passenger Categorization Practices: The Case of the Moscow Metro\*

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The paper is concerned with the social categorizations and perception of social diversity of the Moscow Metro passengers. Drawing on the Goffman's theory, I assume that the interaction between passengers is based on categorization, which links appearance and behavior of people with their cultural expectations. The categorization allows to make interaction participants identifiable and accountable. In 2020 face masks and gloves, social distancing transformed the process of categorization having directly affected personal front of city dwellers and situational proprieties. Using the theoretical resources of Erving Goffman, Harvey Sacks, and contemporary urban researchers, I compare how passengers of Moscow Metro recognized and defined each other under the regular circumstances and during the self-isolation regime, which was enforced by the city authorities at the beginning of the COVID-19 pandemic. The study is built around three general types of "Others" that were developed as abductive notions: non-specific, specific, and stigmatized Others. I analyze how these types are situationally produced and to what extent they change when the localized interactional order undergoes significant transformations. On the one hand, this study is aimed at a detailed documentation of the unique socio-historical situation that occurred at an early stage of the pandemic. On the other hand, I use it as a "natural" breaching experiment that helps to reveal the basic elements of temporal and local specificity of the social order.

*Keywords:* social categorization, everyday interactions, COVID-19 pandemic, strangers, metro, public places, Erving Goffman

## Introduction

Public urban places are spaces of interaction between strangers. This interaction is based on a process of categorization in which participants match each other's appearance and behavior to their cultural expectations (Goffman, 1963: 11). These expectations are related both to their already-existing experience and social knowledge and to the context and situation in which each individual interaction unfolds. This categorization makes it possible to maintain the interaction order with strangers, and it relieves its participants who are cultural and biographical strangers (Lofland, 1998) from a state of complete uncertainty.

In 2020, the COVID-19 pandemic and measures taken to prevent the spread of the virus profoundly transformed the familiar context of everyday life for citizens. As early

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as mid-March, more and more people in Moscow gradually started wearing masks and/or gloves. Thus, the application of the recommended hygienic measures directly affected the *personal front* of the citizens. The appearance of markings in public places and the requirement to keep social distance changed the *situational proprieties* of everyday interactions (Goffman, 1966). The introduction of the permit regime in the Moscow Metro limited the mobility of certain categories of people. In addition, public spaces, due to the very nature of the virus, have become places of a particular danger.

All of this has led to a change in the way of the categorization of other people in public places. What were these changes, and what implications did they have for everyday interactions? I will answer these questions by analyzing the transformation of the ways of the everyday categorization of strangers in the Moscow Metro during the first wave of the pandemic. The research is based on a series of interviews with Metro passengers. I will consider which categories Moscow Metro passengers use while narrating their experiences of the co-presence with other passengers before the coronavirus pandemic and during the “self-isolation regime”.

The study is based on the case of Moscow. The territorial scale of Moscow with its socioeconomic heterogeneity that is reinforced by the daily commuting from the Moscow region increases the social diversity of Metro passengers. Similar “life rhythms” of citizens due to different synchronization points, such as relatively standardized working hours, make the Moscow Metro a place of close interaction with the multicultural urban context. This context reinforces the importance of categorization practices because the heterogeneity of strangers makes passengers rely more on highlighting “typical” traits rather than on their individual ones.

The Metro remained one of the few public spaces that continued to function in Moscow during the “self-isolation regime” imposed from March 30, 2020 until June 9, 2020 (Sobyenin, 2020a). During the first wave of the coronavirus, the Metro underwent the greatest transformation compared to other public spaces. The number of its passengers decreased by 84% (Meduza<sup>1</sup>, 2020a). The social composition of its users changed because of the introduction of the mandatory digital pass system. The Metro space itself has undergone very noticeable adjustments. The introduction of new patterns of behavior, translated in audio messages and visual reminders about the necessity of social distancing and hygienic norms, has significantly transformed the previously routinized context of daily urban mobility.

Such events as pandemics are usually considered at the macro level (Moore, Gould, Keary, 2003), and researchers focus primarily on migration processes and the settlement patterns of cities and countries. Much less attention has been paid to the everyday practices of the interactions in such specific circumstances or to the problem of co-presence in public places. Rather than in social sciences and epidemiology, examples of such work are usually conducted in historical studies of cities during epidemics (McCauley, 2003; Cawood, Upton, 2013; Snowden, 2002).

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1. Организация, признанная средством массовой информации, выполняющим функции иностранного агента. — *Прим. ред.*

Russian studies of the COVID-19 pandemic have focused more on macro-processes to this point. The most detailed research results from the pandemic in Russia can be found in the FOM collection of articles *CoronaFOM Project* (Oslo, 2021), which used both quantitative and qualitative data. The journal *Monitoring of Public Opinion: Economic and Social Change* published an issue devoted to the formation of the pandemic's meanings in the media and social networks. However, the effect of the pandemic on the interactions between public spaces visitors, especially in public transport, has not yet been studied.

In examining changes in Metro passenger interactions, I am building on Goffman's concept of public behavior (1966) and his analysis of categorization and stigmatization practices (1963). Goffman wrote about strangers' interactions in general, highlighting the structural elements of this process, while paying less attention to the features of mutual definition of the interaction participants. In *Stigma* (1963), he outlines the principle of distinguishing strangers, highlighting the traits that make them stigmatized; his attention is directed primarily to the polar categories of the "normal" and the stigmatized.

In this article, I will show that his approach should be supplemented by distinguishing between several types of strangers. I develop Goffman's ideas with the approach of membership categorization analysis, offered by H. Sacks (1972a, 1972b), and complement it with relevant urban studies conducted within the framework of interactional sociology (Cresswell, 2006; Watson, 2006; Darling, Wilson, 2016; Ocejo, Tonnelat, 2014). These authors did not suggest any classifications of city-dwellers or divide them into some certain groups. However, they were focused on different particular specificities which can be considered as a foundation for such distinctions.

Drawing on this reasoning, I suggest a three-part classification of strangers: the "non-specific other", the "specific other", and the "stigmatized other". Each of these types of strangers differs in the degree of otherness, the presence of a moral evaluation, and the principle of interaction with them. Depending on which type the stranger belongs to, the same elements of interaction cause different reactions and lead to different interaction scenarios.

All except one of the interviews used in this paper were conducted from April 15, 2020 to May 12, 2020 (before the introduction of mandatory mask-wearing) by me and my colleagues as a part of the project "Everyday Practices of Public Health: (Non-)following Sanitary Rules at Moscow Public Transport during the Coronavirus Pandemic". I focused on this period, because during this time, people were spontaneously generating new forms of behavior in the situation of the absence of mandatory requirements formulated by the authorities.

Later in the article, I will first present a conceptual framework for analyzing everyday interactions between strangers in public places and justify the distinction between the already-mentioned three types of strangers. Then, in the empirical part, I will examine the changes in categorization practices regarding each of the three identified stranger types.

## The Theoretical Framework

Goffman's interactional sociology (1966, 1983), the framework with which this study is conducted, allows us to examine the categorization process in relation to the informants' everyday experiences, rather than examining only their general ideas about different groups. This makes the analysis more sensitive to the situation in which categorization occurs and allows to capture its changes. This is especially important for the period under consideration when attitudes toward the coronavirus and the decisions made to control it were in the process of (re)definition and changing because of both the spread of the pandemic and the constant extension and strengthening of measures. These measures directly affected the appearance of citizens and the rules for using public spaces, both of which serve as a foundation for categorization that enables interactions between strangers.

I complement Goffman's theory with the membership categorization analysis approach (Sacks, 1972a, 1972b) and public transport studies (Jensen, 2006; Koefoed et al., 2017; Ocejo, Tonnelat, 2014), with whose help I explain the possibility of distinguishing between the three types of strangers on the basis of the strength of the moral evaluation applied to them.

To start with, I will consider the key concepts of Goffman's approach that are used in this study in some detail. Next, I will demonstrate the specificities of everyday interactions in public transport. Finally, I will propose my classification of strangers that both complements Goffman's approach and allows for a more detailed analysis of the transformation of categorization practices in pandemic situations.

### *Everyday Interactions in Public Places*

According to Goffman, public spaces are characterized by *unfocused interaction* between people and *civil inattention* (1966: 83). Being in a public place, people are aware about the co-presence of each other, they realize that they share space with others, and they make it clear to each other by, for example, a quick glance and keeping a distance (Ibid.: 17). Co-presence is not simply about being in the same space; it is a form of interaction in which participants of the *gathering* become perceived, "accessible, available, and subject to one another" (Ibid.: 22). Goffman uses the concept of *situation* to refer to the spatial environment in which assemblies are formed (Ibid.: 18). Situated-ness ensures the order of interactions between people, because for each place there are certain *situational proprieties*, that is, rules that regulate behavior.

Another notion from E. Goffman's approach that is also important for the analysis of everyday interactions is the *personal front* which includes everything that makes up a person's appearance. In the situation of co-presence and unfocused interaction, it represents one of the few sources of information about the participants of the gathering as well as the basis for categorization.

In a public place, one always makes a “scan” of the space from which one receives information about the situation and the participants of the gathering, and conducts a categorization which makes them identifiable and understandable. Categorization is the process of an “ordering” by which “a potentially chaotic and meaningless world of strangers was transformed into a knowable and predictable world of strangers” (Lofland, 1985: 22). This ordering in public places consists of “apparential ordering” and “spatial ordering”, the body and the place presentation of strangers which allow to identify them (27). Categorical knowledge is information about the status, the role of co-presenters, the attributes accompanying them; it indicates participants’ belonging to some social groups. Categorical knowledge (e.g., information about approximate age, gender, occupation, or economic status) can be transmitted during interaction just through the gaze (Lofland J., 1969; Lofland L., 1973).

Categories contain certain criteria and expectations established in society, the conformity or nonconformity to which allows to put the stranger into an existing cultural framework. The stranger’s status is either normalized or stigmatized (Goffman, 1963). Stigma is the undesirable, negative difference between the stranger and the expectations of others who, not possessing it, are considered as “normal” (Ibid: 5). A person with stigma is subjected to a moral evaluation by others, and discrimination; Goffman says “We construct a stigma-theory, an ideology to explain his inferiority and account for the danger he represents, sometimes rationalizing an animosity based on other differences, such as those of social class” (Ibid.). In relation to the stigmatized, “normal” others express disrespect.

The pandemic of COVID-19, and especially “the self-isolation regime” and the restrictions connected with it, has not only changed the demographic profile of Metro riders. It deprived the city, including public transport, of the usual hustle and bustle and crowdedness which is the essence of modern urban life. Everyday encounters and interactions with strangers have been challenged by the changed epidemiological situation. Public places have become spaces of particular danger because of the nature of the virus which can be transmitted through the air and by touch. New recommendations for Metro usage in the form of markings for distance observation, audio announcements related to the pandemic, and, afterwards, electronic passes restricting access to public transportation were introduced. All of these factors have transformed the spatial ordering.

At the same time, the pandemic has also affected the apparential ordering. For example, viruses that had previously received names associated with their place of origin, such as the Ebola virus that was named after a river in the northern Democratic Republic of Congo, led to discrimination, increased inequality, and more hostile attitudes toward migrants from the countries and regions concerned (Ferreira et al., 2020). In the case of the coronavirus pandemic in Russia, at the beginning of the first wave of coronavirus, groups of people from China were identified (Sobyenin, 2020c). Aggression against such groups, or at least increased suspicion or other changes in categorization, is especially possible because the media often use war metaphors in relation to the COVID-19 pandemic. Research shows that the pandemic can become a condition of solidarity even

among strangers when the desire to follow the rules is equated with concern for others (Will, 2020; Matthewman, Huppertz, 2020). Meanwhile, there are some stable social rituals, such as greetings, which, despite their risks in the context of the pandemic, remain important normative everyday practices (Mondada, 2020).

Goffman's approach was developed and supplemented in the works of H. Sacks who elaborated *membership categorization analysis* (MCA) (1972a, 1972b). MCA deals with the collections of categories, the application of which is controlled by certain rules. In identifying these collections and rules, researchers emphasize the importance of the normative nature of categorization. Depending on the conformity or nonconformity of interaction participants with expectations based on the categories attributed to them, they receive a moral evaluation (Jayyusi, 1984, 1991). In addition to actions fitting certain categories, MCA also identifies a wide range of predicates associated with different categories (Watson, 1978); however, both these and normative expectations are immersed in the contexts of individual situations. The work in MCA is notable not only for its particular way of dealing with data, but also for its greater attention to broader and more pervasive categories related, for example, to gender (Stokoe, 2010; McKinlay, McVittie, 2011) or ethnicity (Markaki, Mondada, 2012; Kahlin, Tykesson 2015).

Following the researchers in MCA, I refer not only to stigmatized categories, but also to those who are perceived as "normal", that is, those who do not attract much attention to themselves. I call this type of passenger "non-specific others". In doing so, I emphasize that categorization is not a process of singling out the exceptional and unaccustomed, but the basis of any everyday interaction between strangers.

Goffman's approach, supplemented by the ideas of his followers, helps me to identify the main dimensions within which the categorization of strangers occurs, those of personal front and situational propriety. This allows me to identify how categorization changes in the pandemic and what is more significant in this relation in interactions with strangers, their appearance or their behavior.

### *Public Transportation as a Space for Everyday Interactions*

Public transportation is not only a tool for everyday mobility, but also an important public space in which urban life is (re)produced. Researchers consider it as a place where an urban community (Lucas, 2006; Welch, Mishra, 2013; Ingvardson, Nielsen, 2019) and the emotional background of urban life (Zaporozhets, 2014; Davis, Levine, 1967) are formed. Public transportation, as a space of strict regulation and control (Bærenholdt, 2013) and sometimes social exclusion (Bissell, 2016; Sager, 2016), acts as one of the fundamental means of constructing contemporary urban order and safety (Augé, 1995, 2002). As cities grow, the proportion of time a citizen spends on public transportation only increases (Lindelöw, 2018; Banister, 2011), which suggests that the experience of using public transportation is increasing in importance. All this points to the multifaceted role of the experience of using public transportation in the construction of the image of urban life.

The particular context of public transportation is the ever-changing flow of very different and unfamiliar passengers forced into close bodily co-presence (Maines, 1979; Anderson, 2004; Adey et al., 2012). In addition, Metro passengers often have no way of guessing in advance who exactly they might encounter on the train because of its scale (Ocejo, Tonnelat, 2014). Each new stop of the Metro train brings new strangers who enter and exit the car. That said, public transportation is also a space where opposites collide. Other public spaces often lack this level of uncertainty and heterogeneity. This further reinforces the importance of categorization practices because the heterogeneity of strangers makes passengers rely more on highlighting “typical” features rather than on their individual traits.

Such features of public transport only reinforce the need to structure the passenger flow by singling out passenger types differing from each other by the degree of socio-cultural differences. It is even more important to study this in a comparative perspective, that is, analyzing the conditions for which have been created by the coronavirus pandemic. This allows to identify the most stable and the least stable categories of passengers according to the level and grounds of their moral evaluation.

### *Types of Strangers*

Goffman’s approach and existing studies of everyday interactions on public transport need to be supplemented. In Goffman’s case, the need for addition stems from the fact that categorization is not a process of singling out the exceptional and unfamiliar, but the basis of all everyday interactions between strangers. Therefore, some categories of strangers are perceived by participants in the interaction as “normal”, not attracting much attention to themselves. As for the studies of public transport as a space of everyday interactions, their weakness is that, despite their emphasis on the multiculturalism of large cities and the frequent interactions between different people, the boundaries between them are far from always being blurred or erased. On the contrary, this can lead to an even greater segregation.

In this article, I propose to distinguish three types of strangers encountered in everyday situations, depending on the degree of cultural proximity to the person making the categorization in a public space.

The first type is the *non-specific other*. Non-specific others are passengers whose personal front and actions in no way distinguish them from the general passenger flow. As the city is a “world of strangers, a world populated by persons who are personally unknown to one another” (Lofland, 1985:3), such passengers are regarded just as anonymous co-presenting strangers. Despite the differences between them which are obviously present, these differences, on the one hand, are all too familiar in everyday urban life, while on the other hand, they allow to categorize strangers as being close to the social group the categorizer belongs to. Thus, while recognizing socio-cultural urban diversity but considering it as the foundation of large cities at the same time, researchers sometimes develop

a theory of interaction between strangers, leaving aside some fundamental differences between strangers and the associated consequences for interactions (Goffman, 1966).

When only passengers of this type act as participants in an interactional situation, they appear to be grouped into certain commonalities, for example, into “workers” and/or “students” in the morning car, but even more likely into “ordinary people”, that is, men and women of different ages. In interactions, civil inattention is maintained which can only occasionally be broken by mutual involvement (e.g., passengers may give up their seat to each other or ask each other what the next Metro station is).

The second type is the *specific other*. Such strangers attract a little more attention than others, even though they correspond to the usual framework of the urban cultural diversity (Cresswell, 2006; Watson, 2006). If we consider the historical context, it is possible to understand who the “specific other”, and later, the “stigmatized other” are by using the appearance of an “outsider” in some rather isolated communities as an example. Their presence causes a variety of intense emotions and, for example, deification or hostility and violence towards them. Nevertheless, depending on the degree of difference between the stranger and the host community, the new person can become partially understood, explained and accepted, or otherwise excluded (Lofland, 1985). The excluded one becomes stigmatized and marginalized, while the accepted outsider is only specific. Thus, “specific other” and “stigmatized other” in this work are distinguished based on the degree of their otherness which is actualized either by a comparison with the one who is categorizing them or with co-present others.

Specific others stand out from everyone else, but their cultural differences are not too significant; there are no sustained associations and expectations in public discourse that would be associated with strong negative moral judgments. For example, such people might include representatives of subcultures or of an economic status different from the categorizing one's own.

The third type is the *stigmatized other* (Goffman, 1963). Such passengers stand out because of the characteristics of their personal front and/or actions and are rarely overlooked (Darling, Wilson, 2016; Ocejo, Tonnelat, 2014). There are also clear negative biases associated with their image, which are only reinforced if such passengers violate situational propriety during interactions, or something draws the attention of others to their personal front. For example, a person lying on the seats is likely to be the object of prolonged judgmental stares. Goffman identifies three different types of stigmatization; on the basis of physical deviations, individual character defects, and race, nationality, or religion (1963: 4). I would like to also highlight more specific reasons for stigmatization that are specific to the context of public transport.

An important limitation of this work in singling out the “specific” and the “stigmatized” is the homogeneity established in the sample due to the limitations of recruitment in the midst of the pandemic. All of my informants can be described as a “middle class,” many of whom have a higher education and full-time jobs and have lived in Moscow for a long time. In this sense, they can be grouped into one general category according to

their socio-economic status, in relation to which they categorize others in the process of daily mobilities.

## Research Methodology

The study is based on an analysis of 20 semi-structured interviews with Moscow Metro passengers who continued to use public transport during the first wave of the coronavirus in Russia. This data was collected as part of a research project of the Laboratory of Urban Sociology. The interviews were conducted from April 15, 2020, to May 13, 2020. In Moscow during this time, schoolchildren and students were put on “vacation”, April was declared as “non-working” by a presidential decree, many public places were closed, and using public and private transport was possible with a digital pass only (Sobyenin, 2020a). What is even more important in the context of this work is that wearing masks and gloves on public transport became mandatory only on May 12 (Interfax, 2020). This means that the question of the necessity of following some sanitary-hygienic measures (wearing masks, gloves, or other forms) was not formally regulated in any way during the field phase of the study. Passengers worked out their own individual measures against the coronavirus.

This paper is based on the comparison of two time periods which can be roughly called “before” and “after” the beginning of the coronavirus pandemic. However, the “before” period was considered retrospectively in the interviews. Everyone had not only heard something about the coronavirus by the time of this study, but the “self-isolation regime” had already been introduced in Moscow. How did it affect the narratives about daily mobility on the Metro before the pandemic? I would argue that there is no reason to assume that these memories might have been distorted by the new experience of the pandemic. Firstly, the design of interview was aimed to strictly separate these two periods to keep a balance of focus on both. At the beginning of each interview, I asked respondents to look aside from their latest impressions for a while and concentrate on the memories of the period before the pandemic. Thereby, their narratives were not supposed to include any references to the changes that had occurred. Moreover, this distinction between the two periods was not confusing to my interviewees since comparing “before” and “after” is a common practice for analyzing shifting context. Secondly, the period “after” was not stable and by the time of conducting this research, the pandemic’s impact had just started to transform the reality. The pandemic and its severity were still characterized by great uncertainty, while the image of “before” the pandemic was clearly established and familiar due to its long-term duration and relative stability.

Due to the measures taken in Moscow, I used rather clear age boundaries while forming the sample. In his address on March 23, 2020, the mayor of Moscow obliged people 65 and older to “observe the home regime” (Sobyenin, 2020b) which limited the mobility of these people. Therefore, the upper age limit for informants was 64 and the lower limit was 18 (from this age, on the one hand, full-time employment is possible, and on the other hand, parental permission is not required for interviews). Other criteria for

constructing the sample were gender, the length of daily commutes, the combination of transport modes used by the passenger, and the destinations of Metro trips. Searching for informants, I diversified these criteria in order to get descriptions from people with different, in some cases opposite, experiences.

As a result, the sample included Moscow Metro passengers from 24 to 51 years old; fourteen of them were 24 to 34, and six were 44 to 51, while the gender distribution was 12 women and 8 men. With three exceptions, all of the informants continued to use public transport because they had to attend work in an offline form. At the same time, not all of them went to work every day; there were also those whose trips were reduced to once or twice a week. For all of the informants, a typical Metro ride took at least 20 minutes.

The informant recruitment took place on Facebook through the publication of an invitation post, as well as through the publication in a group dedicated to the Metro. This way of searching for informants was a forced measure due to a number of constraints, both in resources and ethically (for example, in this epidemiological situation, it was difficult to recruit directly in the Metro).

As a result, a diverse sample was constructed, including people from a wide range of professions; a designer, two engineers, a bank employee, a civil servant, a student, three medical workers, a construction worker, and others. None of the informants were acquainted with the author before the interview.

## **Transformation of the Ways of Categorizing Metro Passengers**

### *Non-specific Others*

Speaking about the passenger's flow before the coronavirus pandemic, the interviewees presented it firstly as a faintly discernible mass of people who were described within age and gender categories. In addition, the perception of the common purpose of using public transport in the commute to work and back also contributed to maintaining this monotonous image. Instances of violations of situational propriety by non-specific others, although they caused internal irritation on the part of passengers, did not lead to an extension of the moral assessment to any particular categories of people. It was rather individual and situational.

With the introduction of the "self-isolation regime", the crowd disappears from the Metro, but a new way of generalizing passengers emerges, that is, their consolidation into the category of "working people," which at this time, because of the decisions of the authorities, was fixed discursively. At the same time, categorization also arises due to the noticeable absence of certain categories of passengers who were not singled out before, unless they violated situational proprieties.

## PRACTICES OF CATEGORIZING NON-SPECIFIC OTHERS BEFORE THE CORONAVIRUS PANDEMIC

Before the emergence of the coronavirus, Metro users, for whom this mode of transport was a habitual part of their daily lives, perceived each other as a single stream of “ordinary” people. Passengers became part of one community of the crowd and the passenger flow, even though the composition of this community was constantly changing during the trips. The formation of such a perception is partially facilitated by the fact that the informants told me mainly about their way to and from work, which allowed them to categorize other participants in the gathering as monotonous co-present strangers:

*When you transfer to Tsvetnoy Boulevard, who do you ride with in the car?*

I just can't characterize them in any way, just ordinary. There are not many seniors, children, there are almost no schoolchildren. Usually, it's people who are also going to work. Some kind of office workers, which is probably the majority in Moscow.

(Woman, 48 years old)

The actions during the trip in the Metro consist of applying the transport card, choosing a place on the escalator and a seat in the car were automatized. Non-specific strangers did not arouse much interest, and interactions were limited to civil inattention and, if necessary, joint coordination of actions to avoid encounters. At the same time, due to the frequent forced close bodily presence with others, some passengers could switch to various subordinate involvements, as if avoiding focused interaction (Goffman, 1966: 44), thereby emphasizing their inattention. This allowed them to disengage from the situation, but at the same time, made them less able to discern the passengers around them. As in many other examples of public transport research, Moscow Metro passengers occupied themselves by focusing their attention on books, music on headphones, reading the news, and more (Ocejo, Tonnelat, 2014; Zaporozhets, 2016):

*In general, how do you feel in such a crowded space [metro car]?*

Actually, at such moment, according to my associations, I don't really feel anything, because I try to distract myself, I try to put my attention somewhere to the phone. Because there's not much pleasant at such moment, it can be crowded, it can be hot, you feel how you are sweating. It's all not very interesting to experience and unpleasant.

(Man, 29 years old)

However, when trying to reconstruct who these “ordinary” people are, several grounds for categorizing and distinguishing emerged. First of all, strangers who did not violate situational proprieties were divided into “simple” categories (e.g., gender, age) (Lofland, 1973) for whose identification on a personal front alone is often sufficient. Ethnically different<sup>2</sup> passengers who did not violate situational proprieties, despite cultural differences,

2. By *ethnically different* passengers, I refer to those who are identified as such in any particular context. Of course, any passenger who identifies himself as ethnically different will not automatically be identified as such by other passengers, and not all of such identification from the outside will cause any specific attention.

were not perceived as specific others attracting special attention. They may well have blended in with the rest of the gathering, especially in a crowded car since their presence on the Metro is quite familiar.

When people were singled out only by their actions and their personal front provided no additional information about the gathering participants, they remained co-present strangers, but violating the rule of taking others present into account. In the first place, their singling out had to do with closeness, not simply with the experience of close bodily co-presence of the passengers which is absolutely routine for them, but with the fact that the passengers are forced to become part of the life-world of the other.

#### PRACTICES OF CATEGORIZING NON-SPECIFIC OTHERS DURING THE “SELF-ISOLATION REGIME”

During the period of self-isolation, the Metro ceased to be a place of large crowds of people. The reason for this was the emergence of a new formal condition with the introduction of the “self-isolation regime”, and the need to obtain a pass to travel on public transport. This also led to changes in categorization practices. Despite the fact that everyone had the right to get a pass twice a week during the period of self-isolation, Metro passengers now had a new basis for categorizing others as a single community, that of working people:

Currently, employees of continuous production, medics, pharmacists, sellers remained [in the metro]. People who are related to medicine, like me. < . . . > Mainly, in public transport people are keeping social distance and don't communicate with each other. It is clear that they are going on business.

(Woman, 28 years old)

This is most likely since the majority of informants themselves continued to use the Metro specifically for commuting. Nevertheless, both official measures and the passengers' self-organization in following sanitary and hygienic norms made Metro users more homogeneous in the informants' perception.

The informants also believed that due to this homogenization, Metro passengers were more diligent and coherent in following sanitary and hygienic norms than others. This pattern emerged when I asked informants about other public places they currently visit. Most often, they compared the behavior of people in the Metro to that of visitors to stores, where, in their opinion, the diversity of visitor categories had not changed;

It seems to me that there is more discipline in public transport. Perhaps, it's because there's a specific generation of people using it, who goes to work more frequently, they are more aware of the current events. In the stores, we have a bedroom district, we have a lot of senior people, I think they are putting less efforts [to act according to the rules].

(Woman, 48 years old)

Thus, with the introduction of the “self-isolation regime,” generalized, non-specific Metro passengers become more concrete. The weakly-discernible passenger flow is replaced by a category of working people who are fixed discursively because of the introduction of the permit regime. There are expectations of discipline and awareness in relation to them; this category is not distinguished between different Metro passengers as it was in normal times, but between passengers and visitors to other urban public spaces.

A new principle of categorization emerged in the description of co-present strangers in the Metro, that of the highlighting of absent categories. At the same time, informants did not take into account the fact that, as mentioned above, even during digital passes, anyone could make it several times a week:

There are no little children in public transport at all. It's a relief. < . . . > There are, mainly, middle-aged people. And visually, there are no longer those who travel in groups or in pairs.

(Woman, 28 years old)

This can also be explained by the fact that these categories of people were primarily excluded from the Metro space discursively. For example, such a category were those passengers over the age of 65 who were advised by the mayor of Moscow to stay at home even before the introduction of electronic passes. Another category is the schoolchildren who were transferred to distance learning, and their transport cards were suspended. In this way, some of the Metro riders to whom other passengers did not pay special attention in normal times by lumping them into the general mass of unspecific others became visible. Next, I will show how the perception of these categories changed when they became transgressors of situational proprieties.

### *Specific Others*

Before the COVID-19 pandemic, the type “specific others” included passengers who stood out from the general background both because of their personal front and their violation of situational proprieties. The peculiarities of the personal front of such passengers often indicated their low socio-economic status, but they can also be assigned to specific cultural communities. Although such strangers attracted increased attention to themselves compared to non-specific others, passengers are willing to ignore their otherness if the rule of civil inattention is not violated, and do not engage in focused interaction with them. This is because such strangers are not perceived as unambiguous troublemakers; there are some expectations associated with them, but no clear preconceptions. Even if they are subjected to moral evaluation, other passengers are less critical of them, distinguishing them from stigmatized others.

During the “self-isolation regime”, specific others practically disappear from the informants' narratives. According to their perception, the composition of Metro passengers became more homogeneous. During this period, the division of passengers into socio-

economic categories ceased to be significant, and the categorization of strangers according to their adherence to new sanitary and hygienic recommendations came to the fore.

#### PRACTICES OF CATEGORIZING SPECIFIC OTHERS BEFORE THE CORONAVIRUS PANDEMIC

Specific others include passengers who violate situational proprieties. At the same time, the categorization of these people is also based on the simultaneous identification of features in their personal front that connect them with particular categories.

As has been shown earlier, people who violate situational proprieties, whose personal front is associated only with “simple”, broad categories of gender or age (e.g., the generalized middle-aged woman) remain only non-specific strangers to others. They do not elicit a moral evaluation because the category to which they can be assigned is too broad and is perceived by others as “normal” (Goffman, 1963: 5). If it can be supplemented, for example, by an indication of socio-economic status or by linking it to some cultural traits, such passengers become specific others:

*Who can get your attention?*

Well, everyone’s favorite category is “metro-babki” [old women in the Metro], of course. These are grannies, it is not clear what they do in the Metro at 8 in the morning with their carts. Despite the fact that they look rather weak due to age and health, they are able to cram you into the fullest car, and then reproachfully breathe down someone’s neck, showing they want to sit down.

(Woman, 27 years old)

The categorization of these people is based on two criteria: what a person does and how she looks. This quote aptly describes the main ways in which order is violated in the Metro: in the case of forcing a focused interaction, like an elderly woman who “asks” to give up the seat to her by hovering over a passenger without saying anything. The figure of the elderly person here is supplemented by the location in space and time and features of the personal front, in this case, the presence of a cart. Thus, specific others are not older people in general, but only those who have these attributes, which, according to the informant, put them in the category of “Metro grannies”.

At the same time, it is with respect to these categories of people that the discourse enshrines attitudes about the rules of interaction with them: younger passengers need to give up their place to their elders and treat them with respect. This explanation is based not on her direct experience of interaction with elders or on the peculiarities of their status as passengers, but on the general ideas about the rules of interaction with these older women. In this regard, passengers make arguments that either normalize and justify the behavior of such categories of passengers, or explain the necessity of non-interference.

The singling out of specific others can also be based on a personal front alone. Turning to the experience of using the Metro in the pre-quarantine time, we can identify several characteristics that indicate class, status differences of passengers like smell, their state of

dress, or facial expression. At the same time, some cultural features can be combined with these characteristics or stand alone. For example, people with a bright appearance, in unusual clothing, or even themed costumes are not ignored in the Metro. These criteria by which strangers are categorized in the Metro reflect the characteristics of not just public transportation, but the cultural diversity of the city as a whole (Watson, 2006). Against the general background of strangers, the holders of a particularly prominent status or cultural differences are categorized as *specific others*.

Specific others, who are defined primarily by their personal front, turn out to be “workers” in the Metro, and passengers categorize them by their dirty, dusty, sometimes sports clothing. Their personal front is contrasted with office workers, who ride the Metro in formal suits and are categorized as *non-specific others*.

This type of strangers also includes passengers from the regions because of the combination of socio-economic and cultural features in their personal front. According to informants, passengers on regional electric trains and, more recently, the MCD, are very different from Metro users:

There are more average women in trains. In the Metro I more often see more well-dressed women, very stylish, with a good make-up. Not just casual clothes, but with chosen with some sense.

(Woman, 28 years old)

[S]ometimes it happened that you sit in front of a woman, she's sleeping, an ordinary tired woman. Then you open your eyes near Moscow, and she's putting on makeup. < . . . > In short, she washed her face and put on makeup, and by Moscow the klushka [clumsy woman] turned into a tsarina, korolevishna [queen], and starts walking . . . In the Metro, there's nothing like this, the public is homogeneous, you don't have such a shock that you open your eyes and there's a person in front of you with blue eyeshadow make-up on, you wouldn't see that.

(Woman, 31 years old)

They, like the workers, are contrasted with the non-specific Metro passengers dressed tastefully. Additionally, Moscow-region passengers are sometimes singled out by informants because they are not dressed according to the weather: they often wear warmer clothes than others.

Singling out these two categories of passengers as workers or commuters from the regions indicate the informants' perceptions of class and territorial inequality and their attendant attributes such as a display of impurity, leading to an exclusion from the actual definition of taste in relation to clothing choices. In the perception of Metro users, these passengers are not simply different from others by their economic status, they are also ascribed special cultural attributes. Whatever the case, there are no negative moral evaluations in relation to these categories.

Another category of passengers that involves a certain combination of the characteristics of personal front and (non-)adherence to situational proprieties is “commuters from

the regions”. These are people who make assembly participants uncomfortable because of their inability to conform to the rules of spatial coordination and safety in large cities and, in particular, in the Metro:

*How do you understand that they are visitors?*

By the frightened eyes, by the panicked actions, by the way they are standing. People are facing the exit, going to get out, but they are standing with their backs to the exit. < . . . > Sometimes it happens that they are carried out while they still resist, try not to get out, they are terrified of it.

(Woman, 48 years old)

The lack of knowledge and skills in using the Metro makes newcomers not quite full-fledged passengers, and sometimes even leads to their objectification: in the quote above, non-resident passengers are described not as full participants in the gathering, but rather as a material obstacle that more experienced passengers are forced to overcome. Often, a spatial marker is added to such people; they are expected to be met most often at the ring stations and stations near a railway. At the same time, their presence in the Metro is common and acceptable because their appearance can be predicted. Such passengers do not become stigmatized by others, despite socioeconomic and cultural differences and their inability to use the infrastructure.

Even those signs that indicate inequality and cultural differences (e.g., the appearance of workers) are rarely reflected in the interactions between gathering participants if they involve violations of situational proprieties. The basic principles in the Metro are still the maintenance of civil inattention and the avoidance of focused interaction.

#### PRACTICES OF CATEGORIZING SPECIFIC OTHERS DURING THE “SELF-ISOLATION REGIME”

With the “self-isolation regime”, the division of people in the Metro into residents of Moscow, the Moscow region, and commuters from other regions disappeared. Singling out specific others by indicating cultural differences or a special socioeconomic status became rare when describing other passengers. For some people, specific others were overshadowed by the virus and sanitary measures; for others, specific others disappeared because it became difficult to see any details under their masks.

Since the beginning of the spread of the virus, masks as a new, unaccustomed detail of the personal front of strangers in the Metro have captured the attention of passengers. For those who had not yet begun to use them, they symbolized the need to make a decision for themselves on this issue. In addition, at that time there was a lot of discussion in the media around the necessity or, conversely, the danger of using masks (Meduza, 2020b). Opinions on the necessity of these means were divided, and with it, the two categories of Metro users became the masked and/or gloved and the unmasked.

My informants had very different attitudes toward masks: at the time of the interviews, some had been using them for a very long time, while some had never worn them.

Thus, the Moscow Metro during the coronavirus was no longer a representation of Moscow's overall cultural diversity, but a reflection of the attitudes of city residents toward the coronavirus and the need to use means of protection against it. This added a new criterion for categorizing passengers:

A week ago, I would have had a greater sense of danger from people who put a medical mask. < . . . > If they're wearing a mask, they're probably sick, and they put it on to avoid infecting people. This way of thinking is in the first place, and not vice versa.

(Man, 29 years old)

I think people who are without gloves, masks are more dangerous than others. Not because they are next to me at a particular moment without a mask or without gloves. If they don't use a mask and gloves on the Metro now, they're not so careful in terms of safety, behavior in other situations either.

(Woman, 27 years old)

There is a reaction, not like towards some shahids, but some irritation. I understand that they [people in masks] are acting silly. < . . . > People aren't ashamed of anything anymore, one can even put on a deer mask, I don't know, they are wearing some strange faces.

(Woman, 29 years old)

In the cited quotations, we can see three completely different reactions of the informants to the same detail in the personal front of strangers on the Metro. The division of opinions here is closely connected with the attitude of the passengers of the need to wear a mask. A young man who is suspicious of people wearing masks started wearing a mask in transportation after a sharp increase in the number of people getting infected. The second quote, on the contrary, belongs to a young woman who, at the time of the interview, was already very actively following all the recommended hygienic safety measures, so her attitude toward people wearing masks is rather positive and trusting. The third quote reflects the opinion of a person who has already clearly defined her attitude to the use of masks: her opinion is negative, so her emotions toward people wearing masks correspond.

Masks on par with gender and age attributes of the personal front have become a new, relevant criterion for public transport users to categorize strangers in the Metro. These examples show how issues and criteria intervene in the process of categorizing people on the Metro, and whose significance is high for the everyday life of the citizen during the pandemic as a whole, not just as Metro users. Since the wearing of masks was not yet mandatory during the "self-isolation regime", there was still discussion about the necessity of their use because a clear attitude toward masks had not yet emerged in public discourse. Therefore, the categorization of passengers based on an assessment of the appropriateness of their use of masks during this period belongs to the category of specific others rather than the stigmatized. On the other hand, it was the experience of

everyday-travel on public transport and the opportunity to interact with people taking different precautions against the virus that contributed to the formation of attitudes toward the virus among informants, which then spread beyond the Metro. This is how the Metro and its passengers mutually influence each other, as other researchers have also indicated (Lindelöw, 2018).

### *Stigmatized Others*

The categorization of the “stigmatized others” type occurs on the same grounds as in the previous type, that is, differences in personal front and the adherence to situational proprieties. Features of the personal front and ways of violating situational proprieties, based on which the categorization occurs, may even coincide. Nevertheless, what distinguishes stigmatized others from specific others is the degree to which their otherness is manifested and the moral assessment associated with it. In the case of stigmatized others, their otherness becomes a reason for trying to avoid being in the same gathering with them, and for being suspicious and hostile toward them.

With the onset of the “self-isolation regime”, the same Metro passengers who were considered stigmatized even before the pandemic became more visible in the emptied Metro, leading to an even greater stigmatization. A stranger’s ethnicity on the Metro became the basis for stigmatization more often. A new reason for categorizing a passenger as a “stigmatized other” was the failure to follow new hygiene recommendations, especially the lack of respect for distance which was previously quite common.

#### PRACTICES OF CATEGORIZING STIGMATIZED OTHERS BEFORE THE CORONAVIRUS PANDEMIC

A strong, unpleasant smell or very dirty clothes can become grounds for categorizing a passenger as a stigmatized other in the Metro. Although similar characteristics are attributed to specific others, here we are talking about a much stronger and more contrasting manifestation of uncleanness which may make them not enter a crowded Metro car and wait for the next train. While passengers are willing to be tolerant or simply permissive toward many cultural differences, some things they do find difficult to accept are different manifestations of impurity, which tends to force them to adjust their behavior, prompting them to distance themselves. Such distancing, in turn, can be interpreted as a violation of civil inattention:

If I see homeless people in the metro with a bunch of their stuff, especially if it has a bad smell, I will probably inform the driver. I understand that, unfortunately, there is no complete system of some kind of help for these people, they're just dropped off. < . . . > it happens more or less humanely. < . . . > [W]ith all due respect < . . . > I sincerely sympathize with these people. However, I sympathize with other people too.  
(Man, 31 years old)

This emphasis on purity is consistent with M. Douglas's conception (1966): by pointing to the "unclean", people categorize others, dividing participants in the gathering not just into the "understandable" and "incomprehensible", but singling out those who can harm the social order. Of course, the categorization of such passengers includes the determination of their socioeconomic status, which usually places them at the very bottom of the social hierarchy.

Another category of strangers who could be categorized as stigmatized others is ethnically different passengers. Despite the fact that such users of public transport is a category that received sufficient attention from both the media and the city authorities before the pandemic, ethnically different passengers in the Metro were not perceived as stigmatized others if they, like others, followed situational proprieties. They may well have blended in with the general passenger flow since their presence in the Moscow Metro is habitual. However, in a separate discussion of negative emotions in the Metro or potential threats, it is very likely that this particular category of passengers becomes the subject of attention. E. Goffman in *Stigma* explains the reasons for this as follows: "Typically, we do not become aware that we have made these demands or aware of what they are until an active question arises as to whether or not they will be fulfilled. It is then that we are likely to realize that all along we had been making certain assumptions as to what the individual before us ought to be" (1963: 2).

Frequently, at the moment of the conversation focused on the problems in the Metro, the otherness of the ethnically different passengers is actualized and problematized, which is expressed in the reproduction of stereotypes in relation to them. This category of passengers is not classified as a specific type as it is stigmatized in the public discourse, and a strong negative moral evaluation is attributed to it.

The informants' comments about ethnically-different passengers are primarily concerned with their violations of situational proprieties (rather than their personal front), especially related to sound, such as the loudness of conversations, the sounds of an unfamiliar language that irritate, or the general noisy behavior that intensifies in company:

[R]ussians are just a little quieter, and the fellows who come here, they are a little louder, more emotional, maybe, and somehow they just manage to draw attention to themselves a little more often. < . . . > They discuss something very loudly, waving their hands somehow. I can't even describe. < . . . > I don't know. Just in the metro, if someone catches your attention, when you look closely you understand that this person is a migrant.

(Man, 32 years old)

I think it happened to anyone, that guys from the Caucasian republics often stare at the passengers of the car, maybe discussing them, maybe not, because they discuss people not in Russian. This is also unpleasant, although I don't know, maybe they are talking about their own stuff and just looking around.

(Woman, 27 years old)

It is clear from the quotations that the requirement of following situational proprieties is higher for this category of passengers than for all others. Unfamiliar speech with a glance become a violation of civil inattention even when the person admits that they are not sure whether they are the object of discussion at that moment. In these quotations, the reference to ethnically-different passengers is combined with references to more general categories, for example, when comparing “Russians” and “migrants”/“newcomers”.

Thus, the behavior of a certain ethnically different passenger turns out to be less significant than the informant’s perceptions of the typical features for this ethnicity. Their stigmatization which occurs due to the fact that certain cultural meanings are correlated with this category of people is related to this. Some ethnicities are connected with attributes of low socio-economic status and criminality: the passengers from other ethnic groups, even in the cited quotations, are mentioned together with other “newcomers” (ethnically similar), a category of people with low income and low social status. Much less frequently, but still another form of expression of otherness on their part is mentioned, like smells which are perceived by the informants as smells of an “unclean”, of an “alien” cuisine, or, in the case of couriers, simply food.

#### PRACTICES OF CATEGORIZING STIGMATIZED OTHERS DURING THE “SELF-ISOLATION REGIME”

By erasing the former grounds for identifying specific others on the basis of a personal front, changes in everyday life have increased the cultural gap with the stigmatized others:

Yes, marginalized people have appeared, some sick people who walk and talk to themselves or to others and come up with some strange phrases. For example: ‘If you do not have a family, then give birth from me.’ Some of them are just jerks, there are really a lot of them emerged.

(Woman, 29 years old)

Then, stigmatized others who previously might have dissolved into the crowd and were more likely not to be in bodily contact with informants became more visible. At the same time, it became much easier for Metro passengers to avoid interacting with these people when necessary, because they had a lot of room to move around.

During the pandemic, the category of ethnically-different passengers acquired a special status: at the end of February 2020, the mayor of Moscow announced the need to “monitor those arriving from China” and “conduct raids” on public transport (Sobyanin, 2020c). Thus, there was an increased focus on all those people whose personal front allows others to categorize them as people who came from Asian countries, which could turn them into stigmatized others as written about in some media (Kravtsova, Lohov; 2020). However, based on the collected interviews, we cannot speak about the unambiguous assigning of ethnically-different passengers to stigmatized others after the pandemic began; informants never spoke about the Chinese as a potential source of infection. Due

to the fact that information began to emerge quite quickly that it was possible to contract the coronavirus asymptotically and not even know about it, additional attention as well as suspicion of passengers turned out to be directed more or less equally to all participants in the interaction.

At the same time, ethnicity during the self-isolation regime remained a signal of the possibility of other problems such as violence or theft. Coronavirus restrictions, according to informants, put large numbers of people out of work. Consequently, passengers became fearful that many were in such a desperate situation that they were willing to do all sorts of things.

An element of situational proprieties, such as keeping one's distance, became a criterion for classifying other people as stigmatized after the outbreak of the pandemic. The reduction in the number of people on the Metro made it easier to follow the rule of civil inattention, since there were far fewer people participating in gatherings. It also made it possible to keep a distance of 1.5 meters, which was difficult in a thick passenger flow. It is noteworthy that Metro users got used to this new order of interaction fairly quickly, although it changed their usual daily routine characterized by close bodily contact quite dramatically.

Although passengers were largely forced to keep their distance during the self-isolation regime by the authorities, they already sought to distance themselves from others due to the nature of illness and the medical recommendations disseminated by the media. It was the rule of keeping distance, more than others, that was accepted by Metro users, and its violation was the basis for categorizing passengers as stigmatized others. For example, not everyone was willing to wear a mask or gloves themselves, and not everyone approved when others did, but the need to maintain distance became a consensus point for my informants. This may be due to the fact that distancing even before the pandemic was part of maintaining polite inattention. Following this rule required less effort, and was less likely to transform the usual course of interactions.

At the beginning of the pandemic when masks and gloves were not yet compulsory, the violation of distance between passengers was perceived as a serious violation of situational proprieties. This may also be due to the fact that distance compliance was the first measure that was institutionally declared mandatory, and a fine was imposed for its violation.

It is interesting that in the eyes of the informants, the perpetrators of the new situational proprieties, namely the observance of the distance, were often ethnically-different passengers. This may be, for example, due to the fact that by categorizing these people as ethnically different, some of the informants distinguish them from the general picture of disciplined workers who continued to use the Metro:

Who draws my attention . . . Guys from our southern republics, especially now, when I go to work during the epidemic. Not everyone of course, but the majority try to keep social distance, for instance, and these guys . . . < . . > They don't try to keep the distance at all. They sit in a crowd near people, even if no one is around.

Again, they don't seem to be doing anything so threatening, but this kind of demonstrative violation of the norms that everyone's talking about is scary.

(Woman, 27 years old)

The changes in the perception of this category of passengers are rather ambiguous. On the one hand, one cannot speak of a sharp increase in xenophobia toward people of other ethnicities, which the media had predicted. On the other hand, additional grounds for their stigmatization appeared. Not only were violations of sanitary and hygienic norms attributed to them, but also concerns related to the safety of Metro passengers were voiced. The absence of the imposition of new meanings related to the virus in this category, but the reinforcement of beliefs concerning the socioeconomic situation of this group may testify to the strength of attitudes toward migrants anchored in public discourse.

Therefore, the announcement of the self-isolation regime and the introduction of digital passes reinforced the informants' perception of people in the Metro as a rather homogeneous passenger population, but the explanation for this had new grounds. At the same time, the otherness in the personal front of passengers who were out of the category of co-present strangers became more noticeable. Following the transformation of the epidemiological situation and the emergence of new sanitary and hygienic recommendations, previous categorization criteria (for example, indication of socioeconomic status) for some categories of passengers faded into the background, and for others, on the contrary, strengthened.

If, as has already been said, not many details of the personal front could affect the interaction between the participants of the gathering, the situational proprieties in the Metro imposed serious restrictions on the individual. Before the pandemic, they were largely built around general norms of behavior in public places that formed civil inattention: no noise, no pushing, offering seats to the elderly, standing on the escalator to the right and passing to the left, taking off one's backpack, and so on. However, if only these proprieties were violated, depending on the type of passenger (non-specific, specific, stigmatized) the consequences were different. The intolerance for violating situational proprieties from co-presenters to stigmatized strangers increased. What may have received no attention in the actions of the co-present stranger, the other may have become a reason for focused interaction in relation to the stigmatized, and a violation of civil inattention that is atypical of Metro interactions. During the self-isolation regime, the observance of distance, which had not been realized before and was often violated in the crowd, became the main situational propriety and the criterion for distinguishing the stigmatized type of passengers. At the same time, the ambiguity of the interpretation of passenger behavior and the clear grounds for distinguishing a specific type disappeared.

## Conclusion

The article analyzed the transformations that occurred in the categorization practices of Moscow Metro passengers. These transformations are a reflection of the changes in the everyday life of Moscow residents during the pandemic. Based on the analyzed data, one can observe how the former grounds for the categorization of Metro users (personal front features reflecting socioeconomic, demographic, or cultural differences) ceased to be so significant. The social diversity of Metro passengers with the ability to distinguish both mere “co-present strangers” and “specific/stigmatized others” has become more homogeneous due to officially introduced measures and passenger self-organization. Those who had previously belonged to the category of the “stigmatized others” became even more stigmatized, but everyone else turned into “non-specific strangers”.

These results demonstrate the productivity of the analysis of everyday categorization and the distinction between the three types of strangers that I suggested in the article. The transformation of categorization due to the introduction of “self-isolation regime”, as we have seen, had different consequences for Metro passengers depending on which of the three types they belonged to. My study thus shows how sociocultural differences and categorization practices can influence each other, and how important it is to consider them in combination.

This categorization is the basis of interactions between strangers in public spaces. Therefore, its study should be the starting point for further research into other everyday practices; for example, in the case of the pandemic, one might consider, despite the presence of several types of others, how it is possible to collectively maintain public health through joint adherence to new hygiene rules (keeping a social distance, and wearing masks), which still continue to apply, including the Metro.

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**Влияние пандемии COVID-19 на практики категоризации пассажиров общественного транспорта: случай московского метрополитена**

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В статье рассматриваются вопросы социальной категоризации и восприятия социального разнообразия пассажиров московского метро. Базируясь на теории Э. Гоффмана, я предполагаю, что взаимодействие между пассажирами основано на категоризации — соотношении людьми внешнего вида и поведения друг друга с культурными ожиданиями. Категоризация позволяет сделать участников взаимодействия идентифицируемыми и понятными. В 2020 году маски и перчатки, социальное дистанцирование изменили процесс категоризации, напрямую затронув персональный фасад горожан и ситуационные приличия. Используя теоретические ресурсы Э. Гоффмана, Х. Сакса и современных городских исследователей, я сравниваю, как пассажиры московского метро узнавали и идентифицировали друг друга до пандемии коронавируса и во время режима самоизоляции, который был введен городскими властями весной 2020 года. Исследование строится вокруг трех основных типов Других, которые были разработаны как абдуктивные понятия: неспецифические, специфические и стигматизированные Другие. Я анализирую, как эти типы производятся ситуативно и в какой степени меняются, когда локализованный интеракционный порядок значительно трансформируется. С одной стороны, исследование направлено на подробное документирование уникальной социально-исторической ситуации, сложившейся на ранней стадии пандемии. С другой стороны, я использую ее как «естественный» эксперимент по нарушению фоновых ожиданий, который помогает выявить основные элементы временной и локальной специфики социального порядка.

*Ключевые слова:* социальная категоризация, повседневные взаимодействия, пандемия COVID-19, незнакомцы, метро, публичные места, Э. Гоффман

## Pandemic Challenges to Sociology: A Review\*

DELANTY G. (ED.) (2021) PANDEMICS, POLITICS, AND SOCIETY: CRITICAL PERSPECTIVES ON THE COVID-19 CRISIS. BERLIN: DE GRUYTER. 278 P. ISBN 978-3-11-072020-4

FUCHS C. (2021) COMMUNICATING COVID-19: EVERYDAY LIFE, DIGITAL CAPITALISM, AND CONSPIRACY THEORIES IN PANDEMIC TIMES. BINGLEY: EMERALD. 336 P. ISBN 978-1-80117-723-8

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The COVID-19 pandemic has informed the sociological agenda for almost two years now. Since the end of 2019 and the beginning of 2020, the mainstream sociological focus has shifted towards the ways pandemic mediates conventional research problems such as globalization and inequality, state and civil society, politics and democracy, etc. Many academic publishers are now busy producing an enormous body of sociological literature reflecting on the social and cultural meanings of COVID-19 and its implications to social life.<sup>1</sup> A quick check on the academic search engines reveals that almost every significant publisher is compiling a volume either written by a single sociologist, or composed of sociological essays and papers by different scholars. It seems that COVID-19 has already become a fruitful field of research that will bring books, papers, and research initiatives in the coming years. At the same time, this situation contradicts a common feeling of many academics. Editors of the already-published special issues and volumes argue that, at the beginning of the pandemic, the voices of scientists and scholars from many disciplines except for sociology's were loud enough to be taken into consideration by politicians. The feeling that sociology is missing something essential and therefore stays outside of the public debates seems to be quite common.<sup>2</sup> At the same time the more the govern-

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\* The results of the project "Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic", carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

1. The most recent publication is *Pandemic Exposures: Economy and Society in the Time of Coronavirus*, edited by Didier Fassin and Marion Fourcade, published by HAU Books in December 2021. Russian research and academic fields are no exception. See, for example, *Sociology of the Pandemic: CoronaFOM Project* published by Public Opinion Foundation in 2021; it is a basic introduction to the topic with significant references to conventional issues of public opinion in the context of the COVID-19 pandemic.

2. See, for example, a special issue of *Sociologica: International Journal for Social Debate* published in 2020. In the editorial note, Elena Esposito, David Stark, and Flaminio Squazzoni ask "Where are the sociologists?" assuming that sociologists are too quiet in contrast to the voices of the experts from other disciplines. See, also, Paul R Ward's essay (A Sociology of the COVID-19 Pandemic: A Commentary and Research Agenda for

ments discuss the strategies of getting out of the pandemic, the more important the role of sociologists becomes.<sup>3</sup>

This rising interest is not specific to the sociological field, yet it may be argued that sociological reflection comes with a delay. In this review, I would like to focus on two examples of sociological reflection on COVID-19, and suggest that now sociology is mostly busy with the documentation of the processes, discourses, and social change caused by the pandemic.

The two academic contributions differ in their structures and ideas. The first one is a single-authored volume that addresses COVID-19 and its social consequences from both the communication studies and media sociology perspective, titled *Communicating COVID-19: Everyday Life, Digital Capitalism, and Conspiracy Theories in Pandemic Times* by Christian Fuchs from the University of Westminster (UK). The second title is *Pandemic, Politics, and Society: Critical Perspectives on the COVID-19 Crisis* composed and edited by Gerard Delanty from the University of Sussex (UK). It contains 15 chapters authored by key social science scholars from the UK, the USA, France, Brazil, Chile, Italy, Austria, Germany, and Switzerland. The international team (including Bryan Turner, Sylvia Walby, Donatella della Porte, and others), as one may suggest, would have brought a more diverse set of perspectives; however, as the topics show in the case of COVID-19, we encounter a sort of global sociological agenda. In what follows, I will draw attention to the commonalities of these two volumes, and outline the key constraints of conventional sociological reflection.

The book by the influential critical media scholar Christian Fuchs is published as a part of the series SocietyNow which aims to provide expert snapshots of significant events and changes in contemporary social life. In this respect, *Communicating COVID-19* is a good example of the introduction to the current pandemic and its consequences. The main question is put in this way; “How have society and the ways we communicate changed in the COVID-19 pandemic crisis?” (1). The response to this question is given through the exploration of everyday life and its changes due to the pandemic, of conspiracy theories that inform public perception of the virus, and the digital practices and reception of COVID-19 on the Internet.

The book begins with an outline of the beginning of the pandemic, and narrates the common knowledge available about the virus via the media. This introduction repeats the knowledge which has been widely circulated in the media during the first months of the pandemic. It works as a reminder of the social changes we have been facing, but fails to provide any additional knowledge regarding the social aspects of the pandemic.

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Sociologists. *Journal of Sociology*, vol. 56, no 4, pp. 726–735) that introduces a feeling of regret that sociology is late as usual with its response to COVID-19, and Raewyn Connell’s paper (COVID-19/Sociology. *Journal of Sociology*, vol. 56, no 4, pp. 745–751) where she argues that sociology has little influence on what people think of COVID-19. It is important to note that the current crisis is perceived by many as a threat to the academic legitimacy of social sciences disciplines. It is no surprise that sociologists are among those who try to avoid the loss of public significance, and see the current situation as a challenge to the discipline.

3. See the recent declaration of the German Chancellor, Olaf Scholz, who suggests inviting sociologists along with virologists and epidemiologists to the crisis team.

Each chapter is supplemented with the outline of key sociological ideas and theories that may be of relevance to the research problem. For academic readers, it may seem even unnecessary (e.g., there is a fairly long exposition of what ideology is and how it relates to conspiracy theories).

Fuchs follows the tradition of critical social theory and science as revealed in the way he explains the emergence of the pandemic. Considering the COVID-19 pandemic as “a natural disaster”, he says “it has not been caused but conditioned by global capitalism and agricultural capitalism that has turned land into commodities and capitalist means of production so that a loss of biodiversity and animal habitat has brought wild animals such as bats that transmit diseases to humans into closer contact with humans” (263). He applies this framework to his social imagination near the end of his book, and constructs a utopian future with the communication industry being nationalized.

It would be incorrect to suggest that the book serves only as an introduction to the sociological or communication studies agendas in the pandemic era. As a part of the study of everyday life changes, Fuchs reflects on how the pandemic informed the transformation of space and time and communication strategies, although his findings seem to be obvious for those who have experienced the pandemic restrictions, at least in the countries with governments that have introduced restrictions. For example, Fuchs argues that social distancing does not mean a breach of sociality and communication; instead, communication should now be treated as being mediated by a regulated distance. One more example from the same section on everyday life follows the transformations of the home from a private place to a workspace needing to be reorganized due to the high number of people who should stay at home at the same time and for long periods of time. Some readers may feel tired of the same facts being communicated via mass media, the Internet, and now academic publications, yet I would say that it is still important to document these and other shifting practices. The COVID-19 pandemic showed us that the speed of social change can vary; some novelties can take months and years to become a solid practice, while others live for a short moment and then become difficult and even impossible to recollect. Therefore, even the generalized descriptions as given by Fuchs in his volume become a valuable source and foundation for the collective memory and future research.<sup>4</sup>

The most promising parts of the book relate to the empirical study of conspiracy theories. Fuchs begins with the suggestion that COVID-19 has brought fear, and the situation has become fertile ground for a range of fake news about the pandemic, its origin, and vaccines. Populist governments and the far-right, as Fuchs describes, took advantage of the situation to promote conspiracy theories and claim an individual way of dealing with the pandemic. The closing chapter is dedicated to Donald Trump’s behavior on social networks. Fuchs explores the tweets and the reaction to them using critical discourse analysis of the topics from Trump’s Twitter account (vaccines and autism, the Chinese origin of the virus, etc.) in detail. It should be noted that the analysis was reduced to the

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4. Detailed ethnographic studies would serve this goal better, and at some point, will complement this kind of description.

critical assessment of Trump's statements by providing scientific evidence and then showing their falseness.

The collection *Pandemic, Politics, and Society*, edited by Gerard Delanty, is a different contribution to the field of the sociology of COVID-19. While Christian Fuchs is more concerned with how COVID-19 has become a topic of communication, Delanty focuses on the political implications of the pandemic. His approach does not deal with the pandemic itself and does not study its many aspects. Instead, it looks at the foundational problems of social life via the prism of COVID-19. These problems include social order and control, digitalization, globalization, inequality, knowledge distribution, democracy and political representation, justice, etc. The book is organized in three sections: (1) Politics, Experts and the State, (2) Globalization, History, and the Future, and (3) The Social and Alternatives. In what follows, I will review some of the contributions published in these sections.

In the Introduction, Delanty, himself being a social theory scholar with a clear research focus on the political dimension of social life, calls for the necessity of a historical context for understanding the COVID-19 pandemic. He notes that "the longer perspective of history reveals that we are always between an epidemic or a pandemic." This means that pandemics are not something that intervenes in social order, it is a significant part of it. "They are not a departure from normal life, but increasingly a part of normal life" (7). What makes the current pandemic specific as compared to previous ones is its global dimension. Scholars argue that the pandemic of COVID-19 is a unique event when people experienced similar fears and uncertainty at the same time in various places. Despite its global scale, the pandemic took its practical form depending on what the national measures were. Some countries introduced social distancing, while others additionally closed public places, etc. In this regard, the range of possible options is wide.

The first section is devoted mostly to political issues. Since the current situation is characterized by uncertainty and risk, there is room for the reconfiguration of accepted social, cultural, and political distinctions. In his opening essay, Claus Offe provides a rigid and detailed analysis of how the population is being divided under the conditions of the pandemic (into groups of actually infected, or have tested positively, etc.). This new social division depends on the testing capacity of the political entity, and therefore, according to Offe, defines a specific epistemic regime, that is, a regime of knowing. Consequently, restricting measures depend on the regime in action. Implementing specific measures are intertwined with both the economic and political interests of various agents, and what Offe describes as passions, i.e., fear. Thus, the key controversy of the pandemic policy emerges. On the one hand, the measures introduced are expected to save lives and keep the population safe, and it requires tough decisions on the part of the government. On the other hand, these measures may potentially lead to more crucial damage in the future, and this goes in conflict with the different types of fears, interests, and normative considerations<sup>5</sup> of what the state should do, and how to respond to COVID-19.

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5. The normative dimension of life seems to be the key research issue within the current pandemic, yet it has not been discussed specifically in the volumes under consideration; see the volume edited by Werner

Stephen Turner suggests a slightly different focus on the political dimension of the crisis and, beginning with Giorgio Agamben's arguments, draws attention to the interrelation of the three key agents of the state, the experts, and the public. The experts are those who can justify the implementation of restricting measures since they possess the legitimate status and authority. In his chapter, Turner addresses the role of each part in the crises, and tracks the transformation of the relations using the evidence from the USA. Through the analysis of the experts' failures, he shows both the conflicts between the state and the expert communities and the loss of trust because of the peculiarities of the current situation. What is left is a pure political action required by the emergency. A similar argument on the relation of science and politics is outlined by Jan Zielonka who argues that, during the pandemic, the conflicting interests of these fields have become apparent, and have challenged democratic principles in general.

Few chapters follow the argument that the COVID-19 crisis has made the tendencies that were already present in European and America politics visible. Thus, the transnational emergency politics of 2020–2021 has always been executed by European authorities during the financial crisis of 2010, and today, as Jonathan White shows, it is supplemented by anti-emergency politics. One more topic constantly approached by the contributors is globalization. Scholars (e.g., Daniel Innerarity, Daniel Chernilo, and others) stress the increasing role of national borders and political authorities, and reflect on the changing relations at the national, international, local, and global levels. Yet, they do not assume de-globalization as the main tendency, calling instead for a more nuanced notion of globalization that will take the recent experience of living in a global world into account. It means "to value the cosmopolitanism of the scientific community, the strengthening of global public opinion and the advantages of digitalization precisely because we do not want these things to stop. Nervous globalization must be followed by sustainable 'glocalization'" (103). The same can be said of digitalization and the introduction of artificial intelligence. Helga Nowotny, whose paper opens the second part of the volume, describes COVID-19 as a disease of the digital age, and discusses the controversies that the ubiquity of big data and artificial intelligence causes. Digitalization as pushed forward by the pandemic is not a neutral process of transformation of all of the areas of social life via information technologies. It also comes with an increasing level of risk and uncertainty that challenges the conventional trust society has. A methodologically-similar argument is relevant to the notion of anthropocene and its relation to COVID-19, as Eva Horn argues in "COVID-19 is the Anthropocene in fast-forward".

A different approach to the COVID-19 pandemic is proposed by Bryan Turner. He returns to Max Weber's comparative study of religions and elaborates on the notion of political theology as applied to the crisis of our times. Following political philosophy, he suggests that any kind of catastrophe or disaster assumes a human response in a form of theodicies. These theodicies bring meaning, and are an essential part of making sense of uncertainty and the risk inherent to social life. Turner traces the transformation of theo-

dicy into its secular form of a sociodicy, and provides examples of critical moments in the contemporary history of the USA. Yet, with regards to the pandemic, he fails to indicate whether there is any political theology so far. Turner argues that “we no longer have the intellectual apparatus to formulate convincing and coherent vocabularies and values with which to construct meaningful responses to a catastrophe on the scale of COVID-19”, and does not provide a direct answer explaining this absence.

Reflections on the political foundations of a future society continue to be raised in the chapters of the third section entitled “The Social and Alternatives”. Silvia Walby reflects on social democracy as a missing element in the discussions of the future concerning the post-COVID-19 condition. Her argument is to contrast neoliberal society with social democracy as an alternative that may struggle with risks and uncertainty in a more efficient way. Sonja Avlijaš, in her contribution dedicated to the insecurities and inequalities during the pandemic, focuses on “the political economy of state sponsored security”. In her analysis, she focuses on the social-care jobs that fill the security gaps which emerged during the COVID-19 pandemic. Albenaz Azmanova’s concluding chapter discusses the issues of inequality, the precariat, and environmental and political agendas, all in the context of the pandemic.

Academic reflection on the COVID-19 pandemic is characterized by a different temporality than the typical one in “normal” times. Scholars tend to publish as quickly as possible while the pandemic evolves with a different speed. This kind of acceleration has an impact on the type of contributions. It is quite common to find existing theories and to apply them to the pandemic in order to provide an explanation of what is going on. However, there may be a fundamental problem with such a kind of sociological reflection. Conventional sociology is mostly concerned with meaning while the pandemic (at least for now) is characterized with both an absence of meaning and a high level of uncertainty and risk. In this respect, sociology has an option to go back to the ideas that are foundational for the discipline and reconsider them, e.g., ideas of normativity and political theology, among many other ideas. The second option is to focus on the detailed documentation of the transformation of social practices to conserve the feeling of acceleration and uncertainty.

In conclusion, I would like to stress that these two strategies of doing sociology in the pandemic may not have much impact on policies of dealing with COVID-19. The problem is in the temporality of any academic findings that may be of use, since advancing sociology needs time while social life changes under the pressure of both natural and political reasons.

## Испытания социологии пандемией. Обзор

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# Excessive Faith in Certainty and Its Public Proponents in the Non-linear Uncertain World: Reasons and . . . More Reasons\*

HEFFERNAN M. (2021) UNCHARTED: HOW UNCERTAINTY CAN POWER CHANGE. LONDON: SIMON & SCHUSTER. 373 P. ISBN 978-1-4711-7982-2

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Being a sociologist gives you the right (or privilege) to broaden your readings far beyond “purely” scientific works. There are at least two legitimate reasons for not being too choosy: on the one hand, sociologists need to get out of their “ivory towers” in order to interpret their scientific findings correctly (popular non-fiction provides a better understanding of social representations and beliefs), while on the other hand, sociologists are often reproached for being too theoretical and for missing (or deliberately omitting) practical points (popular non-fiction provides an insight into the work of practitioners we design and conduct our research for). The current pandemic (for the foreseeable future, we will be mentioning COVID-19 as a reference point) undermined the expert claims of science in general, not to mention the social sciences that have always been criticized for being not scientific enough as too subjective and too value-loaded. Today, even natural sciences are hit by criticism from all sides: it is one thing that we still cannot travel in space, which is of little importance for our everyday life, while it is quite another thing that you do not know how to recover from a new illness which is either a nontypical flu not to be too scared of or a new “plague” of our time to be terrified of. The mass media, governments, and experts (even previously trusted ones) do not provide clear recommendations on what to do, change their recommendations all the time, quarrel in indecent debates on TV shows, and constantly accuse, fine, and punish you for doing something wrong in your private life without providing clear and convincing (scientifically and rhetorically) explanations on what is right to do.

Such an intervention by the state and other public institutions has changed the demarcation line between public and private. The state considers this intervention its privilege

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\* The results of the project “Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic”, carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

to make decisions on how you must behave and what you must do under the pandemic in your private life, on whom you can meet and under what conditions, on when you are defined as an infected and social threat, and so on. However, people do not consider such a control of their private life (safety measures, relations with dear ones, free-time choices, or preferences in health practices) as a one-sided path on which only public institutions have the right to question, instruct, and punish. Public opinion demands clearer reports on the reasons and grounds for decisions and measures from institutions and their representatives, and, if not provided with unambiguous and trustworthy ones, prefers to reproach, oppose, protest, or ignore the newly set rules and restrictions, regardless of the consequences.

Furthermore, people started to question those public events that have been indisputable for support, but today, the costs of these events to the public are reconsidered as affecting their private well-being. For instance, flights to the International Space Station have been a national source of pride in Russia since the launch of the Soviet spaceship program. However, when a Russian film crew spent some time in October at the International Space Station to film scenes for the first movie shot in space, Russians did not support this flight with the happiness and solidarity as expected, and questioned the need and legitimacy of spending so much money on this flight instead of buying extremely expensive medicines, financing the post-COVID-19 rehabilitation, and so on.

The main issues are certainly not so much a new, unfamiliar intersection of public and private under the pandemic, the new measures transforming everyday life, including familiar practices and freedoms, or the blurring of the distinction between private and public as if sanctioned by the pandemic, all of which affect the very foundations of contemporary societies and “privacy”. It is rather the issue that underlines all these changes, that is, a bright new (in terms of scale and impact) uncertainty that is both objective (no one can predict when the COVID-19 pandemic will turn into a kind of the annual, seasonal, predictable, and non-fatal flu epidemic) and subjective (no one can be sure of anything under such an objective uncertainty).

According to its praises on the cover, the reviewed book of the

... distinguished businesswoman and author Margaret Heffernan explores the people and organizations who aren't daunted by uncertainty. Ranging freely through history and from business to science, government to friendship [perhaps, sometimes too freely even for non-fiction], this ... book challenges us to resist the false promises of technology and efficiency and instead to mine our own creativity and humanity for the capacity to create the futures we want and can believe in. A new chapter, written in the light of the pandemic, shows how and where uncertainty can drive, even accelerate, positive change.

It is doubtful that the current situation can be defined in such an optimistic perspective, but the author indeed mentions the COVID-19 pandemic only in the last additional chapter, thus, not speculating on the topic at all. It is even more doubtful that the author

can be called the “Karl Popper for the 21st century”, though the book is definitely worth reading.

This work is not only, as they say, thought-provoking, but is also good additional reading for sociologists who want to grasp the idea of total social interconnectedness, the usefulness of the case study as both research strategy and practical guide, and the everyday implications of difficult notions (prediction, freedom, technology, certainty, etc.), i.e., the book is a good “device” for broadening the sociological imagination. The book presents a range of topics that are clearly indicated, explained, and illustrated by convincing examples in a humanistic and optimistic manner. Let us briefly go through these topics.

*First*, it is our unchanging, passionate, and literally manic *concern for the future and its prediction* which makes even the news “mostly speculation: what will happen . . . Entire industries — property, travel, banks, insurance, pensions, technologies — analyze, construct and sell permutations of the future . . . We have come to expect the future to be minutely and perfectly predictable . . . But the predictability of life, on which we’ve come to depend, seems to fall away and we’re left angry, intolerant, fearful” (12).

In the first part, Heffernan explains how our favorite models for predicting the future let us down, and starts with the commercialization of prediction “services”. First astrology became a big commercial business, but it was the financial markets that turned forecasting into a big, important industry by “selling reassurance, inspiration and advice” on the future in order to eliminate “the pain of uncertainty or alleviate it” (16). In the early 20th century, technology just provided the tools to make forecasting scientific (at least to look scientific), freed economics from “physics envy”, and allowed entrepreneurs and statisticians to capture the complexity of economic markets by calculating correlations and identifying measurable patterns. The problem was that this scientific approach was based either on deduction; pundits “applied their theories to mountains of data in the belief that their efforts would elucidate patterns that predicted the future” (20) — or on induction, i.e., “forecasting by analogy, believing that history repeated itself, albeit imperfectly” (21). As history has proven, such economic forecasts were blindsided, and the most successful pioneers of economic forecasts were just lucky: “They had more faith than skill, imbuing their theories and data with the certainty and consolidation they craved. They imagined themselves objective scientists uncovering laws about markets as absolute and reliable as the laws of physics and believed that financial numbers unambiguously revealed immutable scientific truths” (23). This reminds of the competing scientific calculations of the future of the COVID-19 pandemic, which is often wrong as based on biased beliefs or irrelevant criteria for collecting, analyzing, and comparing data.

The pioneers of commercialized forecasting “discovered three profound problems endemic to forecasts that dog them still today [and in the global fight against the COVID-19]: forecasts are incomplete, ideological and self-interested” (23). The first problem is the models we use — they are too simplified versions of the part of reality under study, which means subjective choices of data and tools. “Models will always be subjective and incomplete representations of complex reality” (24), but the state and its institutions ignore this

limitation and continue to produce new and more simplified models, automate them to the limit and trust their results as the final and undeniable truth.

The second problem is “agendas . . . cherished, implicit beliefs about how the world works, about what mattered and what did not, i.e., ideologies” (Ibid.). People rarely acknowledge that their “mental model is an ideology and that forecasts always contain an agenda” (25); in addition, the early forecasting businesses as commercial enterprises had to rely on the preferences and priorities of their customers. The author writes that “Economists could never be impartial observers [like scientists today, which affects the course of the COVID-19 pandemic]. Their models are profoundly susceptible to the beliefs of the human beings who design and run them; they aren’t and cannot be morally neutral [the intervention of personal beliefs and experience into expert assessments has affected the outcomes of the COVID-19 pandemic]” (26). Experts often cannot and do not want to remain dispassionate despite the implicit public requirement “to treat everything . . . as problems to be solved with detachment and objectivity”.<sup>1</sup>

Moreover, experts can neither make policymakers follow their instructions nor control how policymakers implement them, i.e., “experts can advise policymakers on what to do, but they may find their advice taken in ways that were never intended”.<sup>2</sup> Certainly, policymakers can intervene and influence what happen next to the expertise — to the better (by restraining private claims in public sphere) or to the worse (by supporting mistaken beliefs or harmful ideas). However, power (of position or expertise) tends to make its owners hostages of their ideologies — “mental models of how the world works” (“conceptual boxes”). Thus,

They cleave to what they know and are loyal to the grandeur and power of their big ideas — sticking to them often in the face of overwhelming evidence” [this explains the unshakable confidence of antivaxers and flat-earthers]. The only thing that cannot be denied, especially under the pandemic, is that “human discomfort with uncertainty, together with a craving for reassurance, has fueled an industry [of expertise, forecasting and consulting] that enriches itself by terrorizing us with uncertainty and taunting us with certainty. (26)

The third problem of forecasts is that they easily turn from prediction to propaganda, and “recruit us into an army of believers” by implicitly eliminating possible pragmatic questions about limitations and implications of future inventions with the dramatic and confident “rhetoric of inevitability”. Heffernan provides confirmations, such as the lack of questions about the impact of artificial intelligence on the labor market, civil liberties (who owns the data and for what purposes, or what aspects of our existence as aggregations of data can be standardized and measured)<sup>3</sup>, public transportation, and so on. She

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1. Nichols T. (2017) *The Death of Expertise: The Campaign against Established Knowledge and Why It Matters*, New York: Oxford University Press, p. 64.

2. Ibid., p. 223.

3. See, e.g., O’Neill C. (2016) *Weapons of Math Destruction: How Big Data Increases Inequality and Threatens Democracy*, New York: Crown Publishers.

says “The more we believe, the less we question, the more probable the forecast becomes. A simplistic commercial view of the future is being forced onto a world as though there are no alternative possibilities, when in fact there are many” (33). The author’s explanation is simple and pessimistic:

Promising improbable benefits, the propagandists exploit one enormous advantage: ignorance. The future hasn’t happened yet, so we can’t be completely certain that they are wrong. But that’s no reason to swallow whatever we’re told, sold or dazzled by. It’s a good reason to ask better questions. That is what some research firms [especially good sociological ones] hope their forecasts can generate: not numbing certainty, but deeper, more exploratory thinking and debate. A prediction is really a hypothesis [just like conclusions from sociological data and research]. (34)

In general, Heffernan contributes to the “death of expertise” by insisting, in essence, on a universal right to question forecasts and to experiment. Unlike Nicholson, who argues that non-experts are often too confident in their abilities to judge and make decisions while being absolutely ignorant of the matter, Heffernan believes that non-experts underuse their right to question expert assessments. She seems to support Nicholson’s argument that people “immediately complain that any assertion of expertise from an actual expert is nothing more than fallacious ‘appeals to authority’, sure signs of dreadful ‘elitism’, and an obvious effort to use credentials to stifle the dialogue required by a ‘real’ democracy”.<sup>4</sup> However, it is not on the grounds that experts stay in “ivory towers” of scientific terminology with “equals” in knowledge and rigor, but rather emphasizing another of Nicholson’s ideas that technology and science do not increase certainty about the world. Heffernan refers to Popper’s idea about the general growth of knowledge as a driver of progress and an antidote to authoritarianism, while Nicholson mentions Popper’s idea that science is built on shifting sands, and that scientists must revise even the most cherished theories and beliefs.

*Second*, it is our passionate and endless *faith in the omnipotent technology*: “Today’s technology may be the most advanced the world has ever seen, but it is imperfect: incomplete, biased and full of error . . . Artificial intelligence trusts correlations that turn out to be irrelevant, selective or ill-informed” (2). The problem is not technology itself, but the way we use it as the only source of true and objective (free from subjective biases) data. We forget or ignore the fact that we are still designers and users of technology, which makes it as erroneous as we are mistaken. Every sociology teacher of the SPSS knows that students often make it calculate average values and other statistics for nominal scales, which is meaningless and absurd for the scale just coded with numbers.

Heffernan identifies the following challenges of “our utopian fantasy of the tech industry” (6–7): it is an erroneous belief “that all the data in the world will yield perfect predictions” (predictive systems are frequently wrong, which is obvious from trivial or irrelevant recommendations that we all get in the Internet); the high costs of the strong

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4. Ibid., p. 5.

dependence on technology — when outsourcing to machines what we can do ourselves, we contribute to the automation paradox, i.e., we lose those skills that we automate and become increasingly dependent on machines (for instance, GPS is a great device, but it makes us think less, our memory shrinks, our neighborhood becomes less familiar, and the very search task becomes a source of anxiety); and technology helps us by “force-fitting a predetermined model onto the surprising variety of human existence, but absolute certainty about all aspects of our life would be tyranny”.<sup>5</sup>

Today, under the pandemic that the state wants to control, we witness that technology reduces us to selective subsets of the available data, and ignores everything else about us and about people who were not selected to be turned into datasets. Therefore, technology in general and automatization in particular “merely speed up bias, errors, short-term thinking and flaky assumptions” (78). For instance, today’s popular “profiling and assessment technologies are a cheap, fast way to weed through thousands of resumes. But . . . they feed off and look for stereotypes: simplistic, reductive versions of whole people . . . Simplified models of complex individuals encourage us to view one another as objects, types, commodities measured by benchmarks we can’t see and did not define” (80). Simplified models do not help us make good decisions and the right predictions. Heffernan provides a disturbing example — since the uncertainty and ambiguity implicit in DNA data make it hard to use for rational and safe decision-making in gene-editing and generalizing “improving” technologies, who would decide on what to eliminate or amplify (state-mandated definitions in authoritarian regimes or market decisions increasing inequality)? Can we be sure that removing flaws to reduce uncertainty would not deprive us of qualities and traits the future would need?

*Third*, it is our *striking desire for estimating, planning, managing and anticipating (for control in general)* in order to reduce “ineradicable uncertainty inherent to human life” (2). She writes that “The entire construct of management — forecast, plan, execute — hinges our capacity to make well informed estimates . . . We have moved from a complicated world to a complex one. . . Complicated environments are linear, follow rules and are predictable; like an assembly line, they can be planned, managed, repeated and controlled . . . But the advent of globalization, coupled with pervasive communications, has made much of life complex: non-linear and fluid, where very small effects may produce disproportionate impacts” (3). Heffernan considers scenario planning as a replacement for traditional planning which became dangerously ineffective under the today’s complexity and uncertainty with too many assumptions and risks. Scenarios combine “hard data” (rigorously researched and reliable datasets) and “soft data” (cultural differences), focusing less on predicting outcomes and more on illuminating the factors at work. Scenarios must be relevant and challenging, pragmatic, and not ideological; “like life, they are bound to be messy, patchy, full of paradox and contradictions [it is doubtful that policymakers would accept such features for their management and development scenarios]” (156). Heffernan identifies a problem of scenario planning in that it becomes

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5. See, e.g., Zuboff Sh. (2019) *The Age of Surveillance Capitalism: The Fight for a Human Future at the New Frontier of Power*, London: Profile Books.

technocratic and dependent on artificial intelligence as the key: “Once quantified, scenarios can become the enemy of thought . . . too rigid and their makers so wedded to them as to become blind to disconfirming data; numbers acquire more authority than they deserve” (159).

Therefore, institutions ignore our non-standardized and non-quantified demands, we ignore institutional requirements, and both ignore, albeit for different reasons, that “complex global systems incorporate a multitude of factors, each influencing others but controlled by no one person or nation. We used to ignore these systems but their problems have become ours now, when a bank halfway across the world crashes or a government falls” (4). As throughout the book, the author provides here the convincing example of Apple’s iPhone because its production depends on raw materials and suppliers from many countries. This complex supply chain satisfies both the states (taxes and employment) and the consumer (cheaper iPhones), while “exposing Apple (and similar phone manufacturers) to natural disasters, labor disputes, economic volatility, social turmoil, religious strife, trade wars and political discontent: all factors over which the company has no control, little influence and poor foresight” (4).

Thus,

in our hunger to know the future, is the alleviation of doubt and uncertainty sufficient reward for the loss of agency, of autonomy, . . . of social connection and diversity . . . In the utopian picture of predictable lives, we don’t need compassion, generosity or trust, . . . there are no flukes, no happy (or unhappy) accidents . . . Trusting a single approach [total technological control] is always dangerous, but living with incomplete knowledge doesn’t leave us useless or passive . . . Surrendering agency, action and adventure for convenience is a miserable bargain. (102–103)

In the second part of the book, Heffernan insists that small actions can make a disproportionate impact in the complex systems we live in, that we need such actions in the highly dynamic social systems in which theories of change might purport to offer certainty but often prove illusory, and that we need experiments to explore the boundaries of the possible.

The author prefers a broader interpretation of experiment as “a pragmatic way to test out the future”, to “explore the ecosystem, the boundaries of which you can’t quite discern”; “to have real impact, other people must know about experiments and be able to contribute” (112). This contribution is questionable due to many personal reasons (lack of knowledge, desire, time, intentions, etc.) and public rules — the state and its institutions, especially in Russia, do not have a habit of inviting ordinary people to become informed participants of experiments that change their life. Many people are used to being controlled because they “think that change has to come wholesale from the top” and refuse to exercise one’s agency.<sup>6</sup> Heffernan argues that “we start to map our future when we dare to experiment with the present (but do not start with a clean slate), when we don’t

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6. See, e.g., Fromm E. (2008) *To Have or to Be*, New York: Continuum.

make ourselves hostage to the past or to the salesmen of determinism and machines . . . Instead of abdicating the future to those who know no more than we do, experiments are bolder, enlisting every kind of imagination in pursuit of more options. They show us what we miss when we cling to the shore, pinioned by forecasts or orthodoxies, doubt or fear” (148–149).

This is an inspiring description of the possible future, but it poses questions about the costs of experiments and who is to pay them, about those people who refuse to accept experiments or to participate in them, about those institutions and spheres of life that would not survive experiments and do not need them, and about who would decide on the aims, strategies, timing, and participants of experiments. Sometimes people misuse the term “experiment”, which is one of the reasons for the low anti-COVID-19 vaccination rate in Russia compared to many European countries: people believe that the new vaccines were not tested enough to be safe both today and in the future (unknown long-term consequences), and call them an “experiment”, both medical and social. The latter is explained by the contradiction in the state discourse: on the one hand, the Russian government denies the necessity of the direct compulsory vaccination in legislation as violating individual rights, while on the other hand, the government supports the regional and local authorities’ decisions to selectively (in fact, rather generally) introduce compulsory vaccination (as a condition for employment in some industries or for accessing certain public services) in order to protect the society by increasing the share of the vaccinated population.<sup>7</sup>

Heffernan provides another example of the enforced experiment under the current pandemic, writing that “almost overnight, it seemed, companies that had long resisted flexible working (a charter for slackers, some thought) moved large parts of their workforce to working from home” (328) which often increased productivity and mutual trust, exploded frequent two-way communication, and flattened hierarchies. However, “many executives went back to thinking, talking, dreaming about a return to normal. They continued to see the pandemic as an interruption” (329). Certainly, there are many advantages in distant and flexible working, but only if you can arrange a proper part of your private housing space for such public activities. For many people, this is a very difficult, tiresome, and exhausting option, and they are not ready for further experiments on mixing their private and public lives. Heffernan provides many other examples of decision-makers “up to their necks in a status quo trap, believing that a well-measured if scary present is less risky than an ambiguous future” (199). It is not only decision-makers, but also people without power often refuse to change and to be responsible for outcomes and consequences when the status quo is considered “normal”, “bearable” or “good enough”.

*Fourth*, it is *freedom* as the most needed instrument for forging our identity and our future today when “we have huge decisions to make — about the climate, about tech-

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7. See, e.g., Giubilini A., Savulescu J. (2019) Vaccination, Risks, and Freedom: The Seat Belt Analogy. *Public Health Ethics*, vol. 12, no 3, pp. 237–249; Gravagna K., Becker A., Valeris-Chacin R., Mohammed I., Tambe S., Awan F. A., Toomey T. L., Bastae N. E. (2020) Global Assessment of National Mandatory Vaccination Policies and Consequences of Non-compliance. *Vaccine*, vol. 38, no 49, pp. 7865–7873.

nology, capitalism, democracy” (7). Heffernan refers to Popper’s idea that the growth of knowledge is the fundamental driver of all human progress, i.e., history can neither repeat itself nor be a predictor. She does not deny the teaching ability of history, but argues that “the lessons we drew weren’t the right lessons”, because we think in analogies and ignore “the differences between events and open exposure to accident and contingency” (55). Thus, “when the Arab Spring began in Tunisia in December 2010, analogies popped up like daisies (European revolutions of 1848, the Prague Spring anti-Communist rising of 1968, and the fall of the Berlin Wall)” because “the belief that history repeats itself often leads people to think that it is their own history that is being repeated — but not someone’s else’s... It is a very human error to assume that countries, peoples and histories we don’t know very well must be similar to our own and to conflate their history with ours” (55–56). She continues, saying that “History can’t offer recipes but it can provide raw material with which to construct fresh combinations, drawn from where we have been, where we are today and where we wish to be tomorrow”. The fact that history “offers neither inevitability nor guarantees isn’t its weakness but its greatest power” (64), which provides us with freedom of choice.

Heffernan sums up all four points as factors determining our endless search for sources of certainty, mainly by pundits, those “experts and forecasters who claim superior knowledge”. However, the study of their track records for twenty years showed that they rarely were happy enough to guess the right path.<sup>8</sup> In general, the main source of false predictions is unsatisfactory modeling that misses important factors for the valued simplicity and accountability, makes attribution errors, uses inadequate data, and prefers aesthetically-pleasing analogies to critical differences. Our reliance on technology is not a decision:

Technology offers a newer, shinier model, purporting to provide certainty, while in fact merely masking ambiguities . . . Algorithms are opinions encoded in numbers. They impose subjective assumptions on data that’s skewed and incomplete [a good example is the difference in Russia’s positions in rankings of the COVID-19 mortality rate due to the differing criteria for qualifying deaths]. Unique or rare external events may render what was formerly predictable suddenly unforeseeable, making historical data [which we love to refer to] irrelevant or useless (this is frequently true of epidemics). (6)

Thus, this is not a scientific book, but a good sociological reading. One may say that there is nothing new in the book, and a good student can read much more scientific works to learn about exactly the same things with more reliable data, references, and explanations. Such criticism is fair, but the book is a good first reading to “see” the interconnections of the key problems of our time in a clear narrative with convincing cases from past and present, science and business, institutional interaction and everyday life. Some difficult sociological issues are explained clearly and easily, for instance, the biographical

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<sup>8</sup> See, e.g., Tetlock Ph., Gardner D. (2016) *Superforecasting: The Art and Science of Prediction*, New York: Random House.

method (though it is not mentioned as such). She writes here that “Memory serves many functions — and one of them is to allow us to simulate the future... The fluidity of our memory isn’t always negative. It allows us to be more flexible, adaptable and creative in our thinking” (44–45). Another example is the author’s implicit criticism of the narrative approach to life as preventing “a lively, free-flowing combination of routine and creativity, knowledge and improvisation”: “The narrative approach argues, in essence, that each of us constructs a narrative and sticks to its plot and characterization. In the same way that forecasters persuade by constructing a compelling story, strong narratives can become a trap too, constraining and limiting how we see ourselves and other people. Instead of illuminating freedoms, choices and imagination, narrative proposes that we are slaves to plots we can’t know and didn’t write” (45).<sup>9</sup>

Finally, it is necessary to mention what the book is missing (not shortcomings but rather features the reader should be ready for). The author’s narrative is humanistic, and denies apathy or resignation as our possible choices. There is no doubt that we should reject “pundits and propagandists of determinism . . . to explore the contours and landscape of possibility . . . , to be bolder in our search, more penetrating in our enquiry, more energetic in our quest for discovery” (7). Certainly, there is no sense in clinging to determinism (social-historical, economic, cultural, technological, etc.) in the world in which simple, linear trends of development ceased to dominate; however, new theories explaining new forms of nonlinear change and development<sup>10</sup> are not too encouraging or inspiring. Thus, Heffernan presents a too-optimistic and even utopian perspective: there are too many objective restrictions and limitations in contemporary society to agree that every person or nation has a choice at all not to mention the choice “between surrender or participation” (7). “Genius and creativity in preparation” together with “an infinite mandate to explore” and “methodology that progresses with questions” (8) are great things, but, unfortunately, underrepresented in society: a complex, non-linear world permeated with ideologies and itineraries deprives its passionate reformers of a developed imagination and fighting spirit. One of restraining factors is mentioned in the Introduction, where the author writes that “we are deluged with propaganda undermining human talents in favor of the perfection of machines” (9). Thus, the state invests too much money in technology for social control to give up this propaganda, i.e., new generations are born into and socialized in the world based on technology which they perceive as legitimate and normal.

Another implicit pessimistic feature of this optimistic book is that the reader cannot but ask the same question throughout the reading: if people have choice, creativity, passion, and the ability to contribute to positive changes for a better world, why do we still live in the increasingly technologized and dehumanized world? If we know that strictly-linear, command-and-control stories do not work, like expertise without the glue of social capital, why did governments choose both of the wrong approaches to fight the

9. See also Bauman Z. (2001) *The Individualized Society*, Cambridge: Polity.

10. See, e.g., Deleuze G., Guattari F. (1987) *A Thousand Plateaus*, Minneapolis: University of Minnesota Press; Beck U. (2016) *The Metamorphosis of the World*, Cambridge: Polity Press.

COVID-19 pandemic and make the same mistake as in the past of trusting the market during the epidemic?

On the one hand, these are rather rhetorical questions with answers provided by the book despite the author's focus on the positive cases of overcoming the negative aspects of contemporary life. For instance, the current pandemic emphasized the duty of scientists and public intellectuals to freely contribute their ideas to the larger society. However, when the whole environment became virtual, experts became equal to non-experts in their ability to reach the public and to affect its representations and decisions due to the commercial interests and censorship prerogative of the major web channels and social media. Therefore, technology further undermined the expert status of scientists and public intellectuals, showing them as incapable of reducing uncertainty and predicting the next steps of the invisible enemy. The whole situation of uncertainty undermined our trust in policymakers, the ruling elites, and institutions at both the national and international levels as understanding no more than we do, as relying on the same expert opinions and estimates that we read in the media, and as ignoring individual rights and freedoms under the guise of the fight for our health and well-being in the "new social normality".<sup>11</sup> Certainly, people are disappointed with the governments' failed promises of perfect decisions and predictable outcomes based on omnipotent science. However, the author's idea, that instead of "constructing and testing out a variety of scenarios", in the time of crisis, "most companies (and governments) work frantically to construct a single, perfect plan" and "shrink their options just when they need to expand them" (249), does not seem to be convincing since such a choice can be either enforced by objective limitations or justified by the expertise based on previous crisis management.

On the other hand, the author does not exaggerate the activist appeal of the book and does not call to an immediate action — there is rather an explanation of the need to think broader than one's private life, to develop (sociological) imagination in order not to be an object of manipulation for management and commercial reasons, and to strengthen one's free agency to influence public life.

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11. See, e.g., Shelton T. (2020) A Post-truth Pandemic? *Big Data & Society*, vol. 7, no 2; Robert R., Kentish-Barnes N., Boyer A. et al (2020). Ethical Dilemmas Due to the COVID-19 Pandemic. *Annals of Intensive Care*, vol. 10, no 84, pp. 19; Jamrozik E., Selgelid M. J. (2020) COVID-19 Human Challenge Studies: Ethical Issues. *Lancet*, vol. 20, no 8, pp. 198–203.

## Чрезмерная вера в предопределенность и ее публичных защитников в нелинейном мире неизвестности: причины и... еще причины

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## Political Philosophy around Pandemic, or Vice Versa?\*

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The COVID-19 pandemic arose quickly, brought about devastating consequences for the whole planet, and posed the task to re-evaluate our beliefs and everyday habits. Being more than a mere health scare and more than a mere social malady, it exposed us to the need of revisiting our fundamental understanding of our way of life. The whole world sunk into a mysterious atmosphere of the unknown, thus raising new and uncommon questions that no one could answer. No one knew how to react, what to think of the disease and its consequences, how to provide observations, or how to draw conclusions. In this light, political philosophy is often chastised for addressing “perennial” problems while avoiding an analysis of contemporary issues; the book *Political Philosophy in a Pandemic: Routes to a More Just Future* tries to refute this belief by offering a mode of thinking as well as speaking of COVID-19 from a relevant standpoint.

Aveek Bhattacharya and Fay Niker have published a collection of essays on social welfare and vulnerability, economic justice, democratic relations, speech and (mis)information, crisis, and justice, topics quite common for political philosophy in 2021. The series of reflections starts with the publications on [justice-everywhere.org](http://justice-everywhere.org), a blog about philosophy in public affairs which the editors help run (1). They are confident that the issues posed in the book and the results obtained are both unpredictable and predictable. On the one hand, some of them are easy to predict since the crisis has severely sharpened the problems of injustice, i.e. the poor condition of public health systems, educational and intergenerational inequalities, housing disadvantages, etc., all of which existed well before the pandemic. On the other hand, the virus has caused some fundamental changes in the collective behavior that were hardly predictable in the pre-pandemic era. In any case, all of these questions are related to the long-standing problems of political philosophy in one way or another, so the task of the volume reviewed is to highlight these manifold relationships from different conceptual angles. Borrowing classic ideas from political philosophy, it dares to extend their applicability well beyond purely academic matters, as nearly every scholar in the fields of the social sciences and the humanities has been trying to do after the onset of the pandemic.<sup>1</sup> Nevertheless, the editors argue that their volume does not

\* The results of the project “Ethics of Solidarity and the Biopolitics of Quarantine: Theoretical Problems of the Cultural and Political Transformations during Pandemic”, carried out within the framework of the Basic Research Program at the National Research University Higher School of Economics (HSE University) in 2021, are presented in this work.

claim to comprehensiveness in its coverage of the moral and political philosophy of the pandemic (3).

In any case, it is still unclear yet how philosophers should think about events like the pandemic. As the title suggests, the book is divided into five parts according to their topics: (1) social welfare and vulnerability; (2) economic justice; (3) democratic relations; (4) speech and (mis)information; and (5) crisis and justice.

The volume starts from the “Social Welfare” section, uncovering issues of policy analysis rather than of political philosophy. If we pay more attention to these chapters, we will find essays on the relations between the social determinants of public health and the concepts of risk and corrosive disadvantage (13), on children’s vulnerability during school closures (43–50), as well as on the right to adequate housing (55–64). The language and methods of some chapters (2, 5) remind us first of public policy analysis, as well as of political science in general.

The evidence for this is quite obvious. The chapter written by Jonathan Wolff and Avner de-Shalit that is devoted to COVID’s effect on the deficits in different domains and their interdependence is more of policy analysis, as we may see by the questions raised and the notions and methods used (e.g., “corrosive disadvantage”, and “inverse cross-category risk”). The authors based their research on the conception of well-being that matters more for policy analysis than for classical political philosophy today, since it is regarded “. . . not as a deep philosophical theory but as an operational concept” (15). The problem of the harm caused by the virus is raised in quite philosophical terms, but the conceptual tools are taken from policy analysis. I would not consider this as a significant flaw, as it makes it clear why the editors chose to open the book on political philosophy and pandemics in this way.

Chapter 3, written by Sara Van Goozen, raises more philosophical questions of utilitarianism, moral philosophy, and consequentialism (who should get the medical care first during a pandemic?). She tries to show how resources should be equitably distributed in the face of scarcity. Here, we find a mixture of policy analysis (general framework, and the division of citizens into categories), political philosophy (justice, value, and equality), and sociological (ranking, and models) languages. The significant philosophical advantage of the chapter is its attitude towards the material researched, since the author claims that her goal is to find multiple approaches by combining various theories. Thus, the conclusion that all those whose instrumental social value in terms of fighting the virus (such as medical workers, research scientists, or delivery drivers) is higher than others and should be given priority in receiving the medical treatment and care sounds very profound and promising, not because of its uniqueness, but because of the compelling evidence it relies on (39).

School closures during the lockdowns, which are depicted quite vividly in the next chapter written by Nicolás Brando and Katarina Pitasse Fragoso, are also presented rather in terms of policy analysis (i.e., what should professionals and parents do with their chil-

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1. They want to show and “explore the relationship between crisis and opportunity to set out routes to a more just world after the pandemic” (2).

dren's well-being and schooling problems?). The methodology and the practical results (the shift to online education) remain rather within the frame of political science than political philosophy, since online education in schools after the crisis is regarded as a prospect for inequality that will affect the least-advantaged children (50).

The chapter on housing, written by David Jenkins, Katy Wells, and Kimberly Brownlee, explores the tension between adequate and inadequate housing by investigating this divide in the context of lockdowns. Concerning the British statistics, that is, a quantitative analysis of the situation in the UK here and now, it matters whether or not a British citizen lives in inadequate housing, how this "inadequacy" could be classified further, and what kind of practical consequences we can get. An in-depth look at existing vulnerabilities is presented here. Some of the issues in this chapter sound as if they were within the framework of political philosophy, but the conclusions on social welfare do not resemble a philosophical reflection due to their obvious practical orientation (64–65). The language and methods of this part of the volume remind us rather of political science and policy analysis, while the research problems and the questions raised (not by the methods used but by their general meaning) relate more to political philosophy. It is safe to assume that the book is a step towards redesigning and advancing political philosophy to prepare it for research within the subject area of the social sciences.

The second part of the book on economic justice makes some relative philosophical contributions to the political sphere, but focuses more on economic and public policy challenges as they were formulated before the virus spread across the planet. The chapters by David Yarrow, Lisa Herzog, and Diana Popescu are mutually related, and share a common diagnosis of welfare states via a cross-country analysis. David Yarrow explores the problem of public debt, that is, how and by whom it should be paid for during the pandemic. His analysis, based on lucky egalitarian intuitions, aims to demonstrate that current COVID-related social vulnerabilities which hit the younger generations the most are the result of a long-term governmental policy directed at dismantling a welfare state, a general trend that needs to be reversed (80). Lisa Herzog discusses the state's obligations and social protection measures during the pandemic, advocating a return to the principle of comprehensive social insurance (91). Diana Popescu regards the welfare state as quite an inadequate place for the current challenges in proposing a regime of social solidarity that would involve a universal basic income for every citizen (93). All of the research presented in the chapter provides profound conclusions on the pandemic crisis. Why are things like this now? It is because of the privatization and individualization corrupting modern welfare states, and the decline of social insurance principles or a lack of social solidarity. The authors' frameworks assume the methods of economic and social sciences are already built into it, but it also retains the possibility to ask questions within the field of political philosophy. Perhaps the boundaries of such questions would be worth broadening by paying less attention to the "framework" itself. While the borders between the disciplines are not always distinct, the volume's authors' contributions are quite significant regarding the difficulty of compounding an original hypothesis into a step-by-step analysis.

In Part III, devoted to democratic relations, a bright Chapter 11 written by Alexandru Volacu explores the “electoral trilemma” faced by the societies during the COVID-19 crisis (138). Volacu shows it to be an unbelievably dreadful task for an election to get through the pandemic as it demolishes its fundamental principles (i.e., electoral justice). The language and the whole point of the chapter demonstrate a high degree of coherence within the perspective of political philosophy, since elections are regarded here not as a standard governance procedure as political science does, but from the point of view of electoral justice and its consequences for the collective well-being.

One of the most philosophically-sophisticated chapters in Part IV that is devoted to “speech and misinformation” is Chapter 14 written by Rebecca Lowe. It is about the democratic states’ obligations of transparency in times of crisis, and it raises the philosophical question “In which cases is a state-practiced non-transparency justifiable?” The chapter focuses on governmental speech, in particular whether, as some argue, the democratic state’s obligation to transparency is lessened in crisis. The references to morality, to freedom in such conditions, and the fact that there cannot be one correct decision relates to political philosophy. Lowe presents a framework for the justification for non-transparency applying to COVID-19 via the case of mask-wearing (185). The philosophical dilemma not only highlights the problem, but also proposes some answers for liberal democratic societies. Here, we can see the link between theory and practice. Philosophy and political science are more straightforward as their language and conceptual tools are quite common for both, and might be shared.

The chapter on freedom of speech written by Jeffrey Howard starts by describing the current state of affairs, then discusses how can we speak (or write on social media) in public during COVID-19. Media misinformation concerning the virus affects freedom of speech. The author worries about communicative restrictions, asking what they may be. The critical problem for the author is that the government may come up with restrictions of practically any type (especially during the pandemic) since there is no moral protection of the right to free speech for virus-related misinformation (174).

The last chapter, which should have served as an opening for the book, is titled “Pandemic as Political Theory” (257). It turns the book’s logic and title upside down. The volume is an attempt to answer the questions that the pandemic has raised in a general (as editors see it) framework of political philosophy: what are the borders of adequate/inadequate housing; how should a welfare state operate effectively in the current crisis; if a democratic state falling into a state of emergency needs to be transparent; and, can misinformation in the media be considered as freedom of speech or should it be subjected to restrictions. The pandemic is becoming a theory, while the tool turns out to be the subject. It has become a unifying context for all profound cases and objects to which all the notions and instruments of social sciences should have corresponded to.

From a broad perspective, the book makes a profound and very up-to-date contribution to the number of attempts interpreting the current state of affairs by observing the COVID-19 pandemic through the theoretical lens of contemporary social and political sciences. The book presents both empirical challenges concerning the virus and techni-

cal challenges about immediate pandemic responses, attempting to maintain some continuity between the difficulties and challenges faced by contemporary societies in the pre-pandemic era. The authors and editors made many contributions to pronounce and formulate the language of speaking about pandemics, finding the best concepts, terms, and methods to get some reflections adequate to the situation. Crisis robs us of opportunities and exposes our dark flaws. However, the question of why this book is framed within political philosophy and not political science is still relevant; it also demonstrates quite vividly that today it seems reasonable to look at COVID issues in social sciences through a lens of political philosophy. It is about transforming the language and widening the boundaries of political philosophy.

Furthermore, the book is worth reading if the question of how to make the most of this [pandemic] moment of potential change before it vanishes remains among our priorities. If a question of the type “why and what is it for?” is asked, the maximum of conceptual recourses have to be raised. In addition, a lot of evidence will have to be gathered and accumulated in order to move forward. As time passes, many of the consequences and conclusions provided in the articles can become a framework or the tools for a new political philosophy design since its fundamental notions are going to be transformed with regard to the pandemic’s dictionary and context. In the meantime, it is a prospect rather than a current state of affairs, but there is no doubt that political philosophy will investigate and understand the pandemic with the help of this book’s contributions.

## Политическая философия вокруг пандемии или пандемия вокруг политической философии?

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LUPTON D., SOUTHERTON C., CLARK M., WATSON A. (2021) THE FACE MASK IN COVID TIMES: A SOCIOMATERIAL ANALYSIS. BERLIN: DE GRUYTER.\*

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*The Face Mask in COVID Times: A Sociomaterial Analysis* is one of the early examples of the studies intended to explore a COVID-19 pandemic-related phenomenon in a more systematic and holistic manner. The book is written by a collective of Australia-based social scholars, Deborah Lupton, Clare Southerton, Marianne Clark, and Ash Watson, who work on topics of public health, technology, materiality, culture, body, and gender. The data was gathered throughout the first year of the pandemic (2020), which resulted in a dynamic analysis of how masks were re-assembled as a socio-material object in the context of the global health crisis. It describes the period when the initially-uncertain status of masks and concerns about their inefficiency or related risks were replaced by the requirement to wear masks whenever it is impossible to maintain a safe distance and which was introduced in over a hundred countries around the world by July, 2020. The book is interesting and peculiar in at least two ways; first, in what it says about face masks as the key symbol and material equipment of the pandemic, and second, in what it reveals about the specific epistemological position of researchers who produce knowledge amid the ongoing events.

*The Face Mask in COVID Times* consists of five empirical chapters, a theoretical introduction and epilogue, and the auto-ethnographic preface where the authors share their personal experiences of dealing with masks, both on their own faces and on the faces of other people around them. It covers: (1) changing health policies regarding face masks and the development of political discourses around this object; (2) the integration of masks into people's everyday practices; (3) the increasing visibility and tangibility of breathing during the pandemic; (4) various forms of non-mass-produced masks; and (5) care for human and non-human entities that is implemented by means of masks or should be promoted as a response to the ecological threats that masks create. Throughout the book, the researchers refer to a broad variety of cases and examples associated with the main phenomenon under their investigation, from traditional face-covering practices in non-Western countries to the representations of breathing in particular climate conditions, or specific socio-political circumstances such as the Black Lives Matter movement. Overall, it turns out as a patchwork-kind of study that connects different perspectives on

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one object, different national contexts, different types of data, and the different research interests of the authors.

The central argument of the book becomes more apparent and pronounced by the end when the authors show how various manifestations of care for humans that are accomplished through face masks come into dissonance with, first, the rising tensions and inequalities between diverse categories of care-givers and care-providers and, second, the lack of care for the environment that eventually affects and harms both human and non-human beings. This care, understood as “a duty and a set of practices” (72), has taken different forms enabled through the different material embodiments of masks, apart from the obvious use of masks as an instrument of protection of one’s own and, even more so, of others’ health. For instance, especially in the early periods of the pandemic, mask-aid became a form of political diplomacy demonstrating the care (or the lack thereof) of countries for each other, and humanity in general. The DIY production of masks made it possible to care for medical personnel at the time of shortages in the supply of medical masks, for both geographically distant and close family members and the vulnerable members of a local community or society at large. It also made it possible to care for one’s identity and self-expression in public, despite the partial invisibility of one’s face. Thus, not wearing a mask may be considered as an act of care for individual freedoms and personal boundaries rather than a mere act of ignorance. Here, the researchers do not over-romanticize (maybe a little) the mask as a tool of care; instead, they highlight the difficulties and non-obvious outcomes of care performed through mask (non)wearing, production, and distribution.

On several occasions, the authors discuss the moral and political polarization resulting from the opposition between those who support mask-wearing requirements (either compulsory or not, depending on the country) and those who resist it. They gradually reveal the ambivalence of this socially-constructed binary logic. In particular, on the one hand, “the act of wearing a mask seems to overlook and override any potential shortcomings of the wearer, and issues like racism are erased or eclipsed. On the other hand, shame is deployed to paint and position those who do not wear masks in broad brush strokes as “selfish, unintelligent, and sometimes racist” (78), while, as they mentioned earlier, masks are differently embodied and demand different amounts of efforts due to the differences in individual bodily, mental, and environmental conditions. Hence, in some cases, wearing a mask becomes almost impossible even when a person agrees with the public health and moral imperative. This might be the case for members of the deaf community, people with disfigurements who experience difficulties with putting masks on or taking them off on their own, people with autism-spectrum disorders, victims of violence, etc. (41–42).

Another crucial ambiguity of masks as an instrument of care is hidden in the broader bodily and ecological entanglement of masks as socio-material objects and the consequences of their usage. Wearing a mask might be harmful to one’s body (such as skin allergies and damage caused by wearing a mask for a long period of time, or infections caused by improper mask-handling), or to communicative and mental abilities. Moreover, as a new, major source of pollution, masks are certainly harmful to non-human

species and to the environment in general. Thus, relying on masks as a crucial instrument of care requires developing a set of additional individual, collective, and global ecological care practices that could both restrict masks' "negative" affordances and reinforce their positive effects. This suggestion has not only important pragmatic but also significant theoretical implementations. This research is part of the war against the "deep seated approach [that] reflects historical and contemporary philosophies that value and recognize human exceptionalism and agency over nonhuman agencies. In this arrangement, the natural or more-than-human world is seen as passive and there to be shaped by the agentic human subject" (81), which makes people ignorant to "intra-action" (27) through which distinct human and non-human agencies emerge.

The main conceptual framework applied by the researchers is the more-than-human theory supplemented by the domestication theory and feminist new-materialism informed by Indigenous and First Nations philosophies (5–6). Although the application of more-than-human theory seems a bit too illustrative and superficial in some instances, as in the analysis of the virtual event generated through the viral "Bunnings Karen" video (28–29), overall, it helps the authors to hold the complex and multidimensional analytical construction together and lead it to the final theoretical conclusion. They claim that we should aim at "exposing and resisting our tendency to adopt a human-centric position in a post-COVID world in which our connections with and to nonhuman others have become more apparent and important than ever . . . [which] requires responsiveness and carefulness so as not to resort to humanist tendencies that prioritize human experience when we work to imagine collective futures. As we imagine these futures, we will need to negotiate the tension between human-centered understandings of 'health' and the needs of the more-than-human world of which we are inextricably a part" (83).

Along with the mutual constitutions of human and nonhuman agencies, the authors also criticize the persistent and dominating model of the human body as an autonomous and closed-off entity. Such a model leads to the idea of strict body control and individual responsabilization as the key mechanisms assuring public health. Here, the researchers rely on Foucauldian concepts of governmentality and bio-power. While people tend to experience deep cultural anxieties about the loss of bodily control and the blurred boundaries between one's own body and those of others, they fail to recognize how problematic and to the great extent of how harmful this model is in the spread of respiratory disease. The inability to accept that "leaky" bodies (6) are normal rather than marginal and that public health has a trans-corporal rather than individual nature leads to their disbelief in the virus or in the protective effect of masks.

*The Face Mask in COVID Times* fits a certain genre of research and books widespread in social history, anthropology, and cultural studies. The research focused on one particular material object and its diverse but interconnected socio-cultural entanglement. Although it belongs to sociology in general, this book may be considered as a contemporary history study that is meant to document a crucial part of the pandemic as a global phenomenon that — as it feels from within the moment — is changing the course of human history. It tries to grasp and organize as much diverse evidence of the mask's

socio-political, material, embodied, and media existence as possible, as long as this data remains on the surface of our news feed and everyday experience. It is essential to see this book as written in the very uncertain social situation amid the pandemic when spatial mobility is highly restricted, and ties researchers to their locally specific position and view on the world more than usually. Such context leads to a couple of significant limitations that this study seems to have.

First, the research is mostly based on digital visual and textual data and is only occasionally accompanied by auto-ethnographic observations. Such a set of data helps to draw a larger-scale picture of the face mask as the main symbol and equipment of the pandemic, but it does not allow the conducting of a deeper analysis of those socio-material practices and micro-politics of the interaction between humans, masks, and other material objects or elements of the environment. The lack of systematic offline observations made some of the sub-topics to be presented in a slightly sketchy manner (in particular, Chapter 3 on living with facemasks). The availability of digital data and the difficulties, or impossibility, of acquiring alternative empirical material is quite understandable in this situation, but it is worth a methodological reflection in relation to the theory and findings.

Second, the authors consider the diversity of cultural, political, and geographical contexts on several occasions in which face masks are embedded as a global and seemingly-universal socio-material phenomenon. Nevertheless, they mostly focus on Western anglophone countries, especially Australia and the US. While the former is obviously the closest and the most well-known reality for the Sydney-based researchers, the overrepresentation of the latter would need additional reflections. Due to the upcoming US presidential elections, an exceptionally high number of corona cases in the US, and events associated with racial injustice and the BLM movement, the US dominated the news in many countries around the world in 2020. It is probably also true that the US public discourse regarding the pandemic and sanitary measures affected other national media and political agendas and became exemplary. However, this should not be taken for granted as it narrows the researchers' perspectives on some of the key subjects, especially when it comes to the politicization of masks, the arguments for/against wearing them, and the moral arguments developing around masks. It would be great to see such kinds of research grounded in more diverse contexts.

Despite the limitations mentioned above, this study represents a brave and successful attempt to systematize and analyze a global socio-material phenomenon as it has been assembled and embedded in the everyday life and the public discourse of people around the world. Taking the conditions of academic work in that period into account, it is a pleasure to see that a collective of scholars can reach such an ambitious research goal.

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