How to think the political fall-out of the coronavirus crisis? In the summer number of *Foreign Affairs*, Francis Fukuyama—having sketched a future of protracted crisis—offered an alternative picture: the pandemic had exposed the demagogy and incompetence of populists and taught the benefits of professionalism and expertise. Bolsonaro was now floundering, while Trump had failed to lead. Merkel, by contrast, had done impressively well. COVID-19 may ‘lance the boil of populism’, Fukuyama told the BBC, because ‘there’s a correlation between being a populist and doing badly.’ The argument was picked up by Gideon Rachman at the *Financial Times*, under the header, ‘Coronavirus could kill off populism’. Trump and Bolsonaro had demonstrated their inability to face reality, whereas Merkel had had an excellent crisis, Rachman thought. All in all, ‘liberals have good cause to hope’. The *Washington Post*’s Ishaan Tharoor joined the chorus: Merkel, the ‘consummate anti-populist’, had emerged as a political heroine, whereas Trump and Bolsonaro had led the Western hemisphere’s worst-hit nations. Under their rule, ‘confirmed cases soared, while public approval of the presidents plummeted.’

Sage pundits hedge their bets, and these were no exception. But in a global perspective, do their claims stand up? Empirically, not as such. Figures for COVID-19 are generally unreliable and rarely comparable. Gross numbers merely single out the largest of the hard-hit countries. The more meaningful metric is *per capita* deaths, and here the US and Brazil are by no means the worst affected. Peru—governed by the centre right—has a higher mortality rate than both of them, at 1,028 deaths per million. Next come liberal-led Belgium (884) and Bolivia (721) under
Áñez, a right-winger from the so-called Democrat Social Movement. All three have higher per capita death rates than Bolsonaro’s Brazil (707), while Chile (698) under right-wing plutocrat Piñera, PSOE-led Spain (696) and Ecuador (687) under centre-left Moreno have all done worse than Trump’s America (645) and Tory Britain (638).

Conceptually, too, the move from ideological stance to epidemiological competence to (hoped-for) electoral outcome—‘being a populist and doing badly’—elides the complex causes of COVID-19’s differential impact. The virus is playing out across vertiginously unequal social landscapes, set within a hierarchical inter-state system, with huge national variations in medical, social and administrative resources and with general public health striated by accumulated privilege, built up over generations. Fukuyama, with his formation in the historicizing tradition of Hegel, at least nods to some of this. When it comes to framing questions about politics and the pandemic, the radical wing of that tradition, running forward from Hegel through Marx and Gramsci to the Annales researchers and beyond, offers some finely calibrated conceptual tools with which to begin. Freely adapting their notions of the event, the conjuncture and the longue durée may allow us to consider the interactions between the exogenous ‘event’ of the pandemic, the national and inter-state political conjunctures on which it impinges, and the underlying competitive dynamics of the world capitalist economy. The character of the conjuncture, and the forces in play, will help to determine the reception and impact of the event, while the shock of the event itself—and the responses to it—may also deter, defer, deflect or amplify and accelerate existing trends.

The hope would be that such a reading could provide a more nuanced view of COVID-19’s political fall-out than Fukuyama’s stark alternatives of chaos or liberal competence. Thinking historically about the impact of the pandemic also means thinking reflexively about our own temporal position within it. The frontline countries grappling with the onset of the virus in early spring—China, Italy, Iran—knew very little of what they were up against. By late summer 2020, the parameters were much clearer. But the political fall-out of 2021 and beyond will be shaped above

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1 Data from Johns Hopkins University. The figures for excess deaths per capita, a more telling indicator since it doesn’t rely on COVID-testing regimes, are not available for many of the worst-affected countries.

all by the looming world-debt crisis, of which we have only a general intimation. So the notes below are strictly provisional, markers from the present as we are swept forwards on history’s stream.

I

Take Peru: why has it fared so badly? Though one of the richer Andean countries, it has had one of the lowest levels of social spending. The economy, dominated by foreign mining giants, gouging copper, gold, zinc and hydrocarbons from the mountains and the Amazonian jungle, has been depressed by the sector’s downturn since 2014, correlated with China’s slowing growth. The Peruvian fishing industry has been decimated by climate change. Presiding over all this is a kleptocratic elite that saw off the last serious attempt at reform in the 1970s. Peru has one of the highest proportions of informal workers in Latin America, some 80 per cent of the labour force, many scraping a living on the streets of Lima, and one of the highest rates of tuberculosis in the region. The current president, Martín Vizcarra, ex-governor of a sparsely populated mining state, was recruited as vice president in 2016 by one of the country’s old-school politicians, Pedro Pablo Kuczynski. With a background at Oxford, Princeton, World Bank, Wall Street, private equity—a professional, in Fukuyama’s terms—earlier accused of diverting funds to an American oil company, Kuczynski was caught up, along with the apex-corrupt Fujimori family, in the Odebrecht scandal and forced to resign in 2018, catapulting Vizcarra into the Presidential Palace. When his attempt to push through an anti-corruption law was blocked by the Fujimori-dominated Congress, Vizcarra called a legislative election which in January 2020 produced another hostile, deeply fragmented Congress.

Peru’s response to COVID-19 was thus set against a backdrop of elite infighting. Vizcarra’s instinct was to follow the diktats of international institutions. Returning from Wuhan in late February, Bruce Aylward, a top Canadian official at the WHO, had advised the rest of the world to ‘learn from China’, where strict lockdown measures were successfully checking transmission.3 On 15 March, Vizcarra imposed Latin America’s first lockdown: a mandatory general quarantine, policed by the security forces, with people allowed to leave their homes only for essential

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business; schools were shut, borders closed, cities under nightly curfew. In line with IMF orthodoxy, Peru’s social-security framework was skeletal. Chaotic scenes ensued, with millions in Lima denied the chance to work, hungry and running out of cash. Many set out for their hometowns in the mountains, only to be blocked by riot police, tear-gassed and forced back into the slums. The country’s ombudsman reported over 300 protests between March and May 2020, as COVID cases surged.

Under pressure, the Vizcarra government announced a cash-transfer programme for poor families. But Peru’s database of low-income households was one of the scantiest in the region, covering fewer than a fifth of the country’s children. When the government opened a website to allow Peruvians to self-register for assistance, it crashed under the weight of 16 million applications. It was not until May that a broader cash-transfer programme got under way, though the long queues to collect cash handouts then became infection hotspots themselves. Peru thus saw a double wave of cases, first in May and then a larger surge in August, while deaths climbed steadily throughout the summer. Meanwhile, as global uncertainty drove up the world price of gold and silver, the mining conglomerates, which had all but ignored the lockdown, powered ahead with production. The mines themselves became COVID vectors, leading to armed clashes between security guards and indigenous villagers starved of food and medicine. By this stage, cemeteries were overflowing, hospitals on the brink of collapse and hundreds of irreplaceable medical workers had died.

Here the legacy of the left-led Latin American states that had tried to use the China commodities boom to develop extensive anti-poverty

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4 Peru’s cash-transfer programme reached only 18 per cent of children (defined as under-18), compared to 48 per cent in the system built out under Evo Morales in neighbouring Bolivia, a poorer country. See the useful comparative study from ECLAC of the roll-out of COVID-19 social-protection policies in ten Latin American countries by Merike Blofield, Cecilia Giambruno and Fernando Filgueira, ‘Policy Expansion in Compressed Time’, ECLAC Social Policy Series, no. 235, Santiago 2020. By late August, Peruvian social assistance was still reaching only 60 per cent of informal workers, with aid equivalent to just 20 per cent of the national poverty line, compared to 71 per cent of the NPL in Brazil.
programmes—Bolivia, Brazil, Argentina, Venezuela; to a certain extent, Ecuador—proved a telling advantage. The political conjuncture in Brazil was one of rabid reaction against that experience, led first by a figure from its traditional elite, Michel Temer, together with the highly political state prosecutor Sérgio Moro, and then by the wild far-rightist Bolsonaro, harnessed to the Chicago-educated investment-fund manager Paulo Guedes. Yet in contrast to Peru, Brazil’s response to the crisis could rely upon the social-protection machinery of the Bolsa Familia and other programmes, built up over the course of a decade by the Workers’ Party (PT) governments of Lula and Dilma. In late March, the PT Congressional caucus succeeded in pushing through an emergency COVID-19 cash-transfer programme of around $110 a month, as basic-income support for all Brazilians on less than half the minimum wage.

The initial roll-out was chaotic. Though infection rates were soaring, government offices that had been shut down for the pandemic had to be re-opened. Meanwhile, Brazil’s powerful regional governments had gone ahead without Bolsonaro and declared states of emergency, shutting the schools. New cases in Brazil peaked in July, then started falling; deaths, which had plateaued from June, began to decline. The political upshot, however, redounded to Bolsonaro’s benefit. With the enlarged cash-transfer programme, poverty levels began to fall during the pandemic and Bolsonaro’s ratings rose by 10 per cent among the poor. Capitalizing on this, the government is planning to consolidate existing PT programmes into a permanent basic-income programme for low-paid informal workers, Renda Brasil, for which Bolsonaro will take the glory—though the looming debt crisis and the harsh spending cap imposed by the Temer government in 2017 may yet derail this. So far, hopes that ‘populist incompetence’ will come a cropper in Brazil are far from being realized.

5 A political reaction that combined the modern with ‘the oldest of the old’, as Roberto Schwarz had warned: ‘Neo-Backwardness in Bolsonaro’s Brazil’, NLR 123, May–June 2020. Bolsonaro’s puerile posturing as the pandemic struck was described in blistering detail by Mario Sergio Conti, ‘Pandemonium in Brazil’, NLR 122, March–April 2020.

6 The subsidy provided by PT social provision was only one factor in Brazil’s comparatively less-bad performance: Brazil’s health spending is 9.5 per cent of GDP, or $900 per capita, compared to 5 per cent, or $675 per capita, for Peru; Brazil has 50 per cent more hospital beds per capita: 2.2 beds per thousand, compared to 1.6 beds per thousand in Peru. Data: World Bank.
As in Peru, so too in India, eagerness to follow Fukuyama-style expertise—to apply the latest global policy model, without starting from a consideration of the social needs and realities of the nation—resulted in disaster. The political conjuncture saw Modi cement his hold with a second landslide in 2019, despite falling growth rates as international investors registered their disappointment at his economic record. Here, unlike Brazil, far-right rule was shored up by a tightly disciplined mass-cadre party, the RSS, that could appeal beyond the landlord/brahmin structures on which Nehru’s Congress had historically depended. Nevertheless Modi’s raft of anti-Muslim laws, launched in December 2019 when the virus was already circulating in neighbouring China, provoked nation-wide protests and an occupation movement on the streets of Delhi. Whether out of authoritarian reflex, competition with Beijing or an attempt to show overseas investors he was in command, Modi imposed a national lockdown on 1.3 billion people, with only four hours’ notice, on 24 March.

Reminiscent of Indira Gandhi’s 1975–77 Emergency, Modi’s hyper-centralized management succeeded only in incubating the virus in the crowded slums and inflicting the deepest contraction of any major economy in 2020, while failing to control transmission. In the name of ‘investor confidence’, Modi delayed expanding India’s in-kind social-protection system—state granary hand-outs of rice or wheat to some 800 million ration-card holders—even as he deprived India’s vast informal-labour force of its livelihood. Responsibility for healthcare and social provision was delegated to the cash-strapped regional states, many of which—Assam, Bihar, Uttar Pradesh, Maharashtra, Kerala, Karnataka—were also fighting floods over the summer. Yet Modi’s political position remains impregnable, thanks to the collapse of the Congress Party. This has allowed him to go onto the front foot, using the distraction of the crisis to ram through the deregulation of agriculture and other free-market measures, accompanied by mediatized charades of piety—kneeling, as the cameras rolled, in saffron-bathed pseudo-humility at the re-consecration of the former Ayodhya Mosque. India’s health service

7 Achin Vanaik, ‘India’s Two Hegemonies’, NLR 112, July–August 2018.
is notoriously underfunded: only 3 per cent of GDP, or $70 per capita; frontline healthcare workers, often lower-caste and female, have been given almost no protection against the virus. The country’s statistical failures—only a minority of births and deaths are officially registered at the best of times—make its COVID-19 rates a matter of guesswork; hopefully, reports that the virus is proving less lethal there, as also in some African countries, will be borne out. But as with Bolsonaro, far-right ‘incompetence’ has seen rising approval levels.

The disaster unrolling south of the Himalayas has stood in stark contrast to the high-tech approach in East Asia. In China, however, the conjuncture was also one of slowing growth, rising debt and unemployment, tightening CCP control and, with the abolition of term limits in 2018, personalized rule. Regional officials made jumpy by the anti-corruption campaign colluded in muffling early information about the virus in Wuhan. The Chinese system benefited from a major expansion in health insurance over the past decade, in principle covering 95 per cent of the population, though with differential results. COVID-19 patients could get treatment first and settle bills later. The hospital system was backed up by large-scale private tele-health companies, contacted by millions, where doctors gave online advice. But the provisions for social support were brutal. The existing dibao cash-transfer system offers an average of 47 yuan ($7) a month and covers barely 5 per cent of the population. Instead, the timing of the lockdowns, rolling out from Wuhan’s on 23 January, ensured that many rural-hukou migrant workers—who filled low-paid urban jobs in construction, manufacturing, food services and retail—had gone back home for the New Year holiday; once in their villages, they were registered as ‘farmers’, who did not need to be counted for unemployment support. In contrast to the high-tech temperature checkpoints and cell-phone QR codes in the cities, village lockdowns involved simpler methods, like blockading the only road. It is estimated that between 30 million and 50 million rural-hukou migrant workers were unemployed in March, with the number dropping to perhaps

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10 Critics have argued that if Wuhan had been quarantined a week earlier—on 16 January 2020, rather than the 23rd—two-thirds of Chinese coronavirus cases could have been prevented: David Cyranoski, ‘What China’s coronavirus response can teach the rest of the world’, Nature, 17 March 2020.
20 million by May; trapped in the countryside, many got through March and April by low-wage odd-jobbing.\textsuperscript{11}

At the same time, another China briefly found a voice under the lockdown. The death of the whistle-blowing doctor Li Wenliang was greeted by an unprecedented outpouring of national solidarity on the web. Fleets of young volunteers mobilized to aid Wuhan, as Ai Xiaoming has recounted.\textsuperscript{12} Has any other country produced a literary response comparable to the multi-media online diaries of Ai and others in the Wuhan enclave? The netizens’ movement soon fell victim to the crossfire of strident attacks from the White House and replies in kind from Beijing, in turn arousing an army of nationalist social-media enforcers. Nevertheless, at the height of the crisis, popular and state mobilization seemed to work together. The policy of ‘centralizing resources to do big things’ saw spectacular feats of hospital construction, the mobilization of thousands of rapidly trained Army medics and a powerful propaganda campaign, big street banners reinforced by community self-policing.\textsuperscript{13} China has gone on to expand its model of reverse-tribute economic diplomacy, offering low-cost medical supplies to the world, and has arguably strengthened its position vis-à-vis the US. Yet the blow to rural-hukou incomes threatens it with a ‘swoosh-shaped’ economic recovery—trailing off into prolonged stagnation, as the asset-rich pull ahead of a wage-dependent precarious mass; a decidedly Western model.

Germany’s success to date in containing COVID-19—along with that of Japan, South Korea and Taiwan—is the best news of the crisis.\textsuperscript{14} It

\textsuperscript{12} Ai Xiaoming, ‘Wuhan Diary’, NLR 122, March–April 2020.
\textsuperscript{13} A UN report on the mental-health tolls of COVID-19 estimates that in China, 35 per cent may be suffering from significant levels of psychological distress, caused or worsened by coronavirus; it also gives figures of 45 per cent for the US and 60 per cent for Iran.
\textsuperscript{14} Germany’s successful local measures find a parallel in the ‘mosaic’ model of local lockdowns, large-scale testing and contact-tracing adopted in Japan, South Korea and Taiwan; all pre-armed by the devastating SARS epidemic of 2003.
looks all the more impressive compared to the record in the UK, Italy and Spain. But Merkel herself has not taken many initiatives. Policy and provision have been the responsibility of the powerful Länder, with their elected parliaments and substantial civil services, who negotiate their differences in the Bundesrat, without the Chancellor’s help. One upshot has been a coordinated flexibility in mandated lockdowns—the eastern regions, where cases are low, generally staying open, while tight restrictions prevailed in Bavaria and the west. Decentralization has allowed Germany to avoid the publicity-driven switchbacks that have characterized Johnson’s management—and Macron’s. The inertial tendencies built into its post-war system have slowed the inexorable advance of neoliberal marketization: a high-quality engineering base could be switched to producing medical supplies; a well-educated workforce could help with contact-tracing. Above all, Germany was the one major economy to experience consistent growth through the Eurozone crisis, while crushing austerity regimes were imposed on the debtors. As Wolfgang Streeck has pointed out, German health spending runs at over 11 per cent of GDP, substantially more than Italy or Spain, and Germany’s health budget has grown at around 2 per cent a year since the financial crisis while Italy’s contracted by –0.9 per cent and Spain’s by –1.4 per cent for 2009–13, in austerity conditions mandated by Berlin.¹⁵

Under the lockdowns, Germany’s treasured debt brakes have burst asunder. In face of the shocking tolls in Italy and Spain, Merkel has belatedly played a role in swinging Berlin’s weight behind the mutualized-debt instrument for the Eurozone’s coronavirus recovery fund. But as John Grahl points out below, though the shift is not insignificant, the scale of the fund (€390bn in grants-with-strings over three years, plus another €360bn in potential loans) is miniscule compared to the trillions of dollars sluicing through Eurozone credit markets.¹⁶ It is understandable that Anglophone commentators should think Merkel has ‘had a good crisis’. At the start of the year she was a lame-duck Chancellor who had failed to appoint a successor, as the waves of the Wirecard scandal

¹⁵ The comparative figures for health spending/GDP are Spain: 8.9 per cent, Italy: 8.8 per cent, UK: 7.6 per cent. Germany has more than double the hospital beds per capita (8.1 per thousand), twice as many nurses (12.9 per thousand) and many more doctors (4.2 per thousand) than the other countries: Wolfgang Streeck, ‘European solidarity—too little or too much?’, El Salto, April 2020; OECD, Health at a Glance: Europe 2018, Paris 2018.

lapped at her door. In stark contrast to the serial failures of testing and tracing in the UK, the German system has coped. Merkel’s party has risen 8 points in the polls since March 2020, while the Greens and the AfD have dropped. Nevertheless, no one is asking her to stay on.

And Trump? In the US, COVID-19 struck a country entering its twentieth year of economic malaise, with jobless recoveries, anaemic growth, deindustrialization and exorbitant asset wealth entrenching and radicalizing red-blue cultural divisions. Trump is, of course, a symptom of this, not a cause, but he has also been an energetic agent of polarization, governing explicitly against ‘failed, high crime’ Democratic cities and states, as he has tweeted. If the toll the pandemic has taken in the US—213,000 deaths and rising—is not the world’s worst in per capita terms, it is still far higher than it should be, given the size of American GDP and nominal health spending at an astronomical 17 per cent. How far has Trump’s truculent insouciance been responsible for this? The main charges against him are that he has recklessly disparaged and politicized mask-wearing, turning a protection against the virus into a weapon in the culture wars; that he unconscionably delayed Federal mobilization to deal with a national crisis, allowing the virus to enlarge its hold; and that he urged the re-opening of the Sunbelt states in May, enabling the second and larger surge of cases. Finally, Trump has turned the White House itself into a COVID-19 cauldron, hosting a super-spreader event in the Rose Garden for his Supreme Court candidate that saw POTUS, FLOTUS and half his campaign staff brought down with the virus, apparently introduced by the embraces of his publicist with the Army top brass.

Not all these claims have the same weight. Trump’s irresponsible politicization of mask-wearing does not seem to have deterred Americans from using them. According to one report, around 70 per cent of Americans wear masks, including over 50 per cent of Republicans—far higher than the rates of 10 per cent in Denmark or Sweden. In a recent poll, 72 per cent of Americans—including nearly half the Republican electorate—thought Trump had failed to take the risk of contracting the virus seriously enough. Approval of his handling of the pandemic has
flatlined at 35 per since July. The slowness and incompetence of the Federal response to the pandemic have been patent, due in good part to Trump’s initial attempts to shrug off its danger. This was compounded by the nepotism of appointing his completely untrained son-in-law Jared Kushner to oversee FEMA’s sourcing, stockpiling and distribution of PPE and medical supplies—even if other long-standing deficiencies of the agency were also at work in the shortages of March and April, when states were competing against each other for ventilators, N95 masks, respirators, gloves and face shields.

There is less evidence for Trump’s culpability for the second surge that hit the red states and the Sunbelt through July and August, higher in terms of cases though lower in deaths. The most populous state, California under Democratic rule, contributed the largest share of new cases. Overall, as Ross Douthat has noted, the greatest responsibility for America’s nearly quarter of a million deaths lies in all probability with social factors that preceded Trump and will outlast him. Among them: a hopelessly costly and far-from-universal healthcare system; a precarious, low-wage labour force which cannot afford not to work; inadequate class-and-race-biased social provision; poor underlying health conditions, like the epidemic of obesity in the country, that are themselves symptoms of the manifold psychic and material stresses under which so many Americans live and die. The countries that have handled the pandemic best—South Korea, Taiwan, Japan, Vietnam, Germany—are characterized not only by the competent state administrations Fukuyama lauds but by comparatively low levels of social inequality. Even in Latin American conditions, relative moves to diminish poverty have proved their worth.

Trump’s long shot at a second term depended on the booming stock market, tax-cut wealth effects and slow but continuous economic recovery that characterized the start of 2020. Instead, after the deepest contraction on the historical record, the US economy has made no more than perhaps

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a 60 per cent come-back. At the start of September, unemployment was at 8.4 per cent, nearly double its pre-COVID level, and the $600 top-up for unemployment insurance had expired. Small-business revenue was down by 19 per cent, and by 48 per cent in the leisure-hospitality sector. Chapter Eleven bankruptcies were up by half from 2019. A quarter of the work force is still tele-working from home because of the pandemic. Nearly a third of households with children are unsure of having enough to eat. Florida, where the leisure sector has been decimated, has seen 14,000 deaths, over 3,000 in Miami-Dade alone. Cases are surging in Wisconsin, rising again in Michigan, stabilizing around 900 a day in Pennsylvania, where 8,000 have died. Ohio is seeing 1,000 new cases a day and employment still well below pre-COVID levels. Should Trump die from the virus or be incapacitated by it, a Pence candidacy would not upset the race. The election is Biden’s to lose.

Could his victory ‘lance the boil’ of American discontents? The factors fuelling them have only been intensified by the pandemic. The largest per capita toll of the virus has fallen upon low-waged Hispanic and Black Americans. Lockdowns and social distancing have wiped out swathes of low-paid service-sector jobs—and with them, most of the post-2009 employment recovery. The passage of the CARES Act through Congress—trillion-dollar corporate bailouts that dwarfed handouts for households—demonstrated the bipartisan support for America’s plutocratic order, with AOC, Sanders and Warren lone Democratic dissenters. In a high-stress society, the additional anxiety of the epidemic has brought out both strengths and weaknesses: mutual-aid networks and soaring gun sales, brazen police aggression against black people and massive demonstrations of solidarity against it.

Alongside France, the US has become a world leader in social tumult. In early March, it was widely believed that lockdowns would put an end to protest. Instead, the ferment has intensified. The labour website Payday Report has logged hundreds of strikes over the last six

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months: meatpackers in Nebraska and Minnesota, nursing-home carers in Pennsylvania and Illinois, bus drivers in Virginia, construction workers in Florida, Amazon employees, truckers, fast-food workers. On 9 June, the day of George Floyd’s funeral, dockers and longshoremen shut the country’s ports in solidarity with Black Lives Matter. With the start of semesters this fall, students could become a new front line. Meanwhile pot-banging protesters in Chile and Colombia have carried placards reading ‘Hunger’. There have been food riots in Tegucigalpa, Panama, Oaxaca and Puebla, as well as Mumbai and Surat. Anger in Egypt, Lebanon and Iraq has been growing, as also in Belarus and Khabarovsk. The question in prospect is not so much the disappearance of populism, but rather what new political forms these often inchoate mass protests may take in the 2020s.