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Global Challenges to Democracy: Backsliding, Resiliency, and Democratic Theory

Kenneth M. Roberts, Valerie J. Bunce, Thomas B. Pepinsky, and Rachel Beatty Riedl

Democracy's retreat on the global stage since the first decade of the twenty-first century is a sobering reminder that history does not follow any predefined script. The new century commenced on a democratic high note, riding the crest of what Huntington (1991) labeled the "third wave" of democratization – the broadest and deepest expansion of democratic governance the world has ever seen. Over sixty countries transitioned from authoritarian rule to some form of democracy between the mid 1970s and early 2000s (Mechkova, Lührmann, and Lindberg 2017: 163), leading prominent voices to hail the global triumph of liberal democracy at the post-Cold War "end of history" (Fukuyama 1989). A more somber tone set in, however, by the second decade of the twenty-first century in response to a series of high-profile cases of democratic erosion or "backsliding" toward autocracy (Diamond 2015; Bermeo 2016; Snyder 2017; Waldner and Lust 2018; Przeworski 2019; Diamond 2020). Although scholars disagree on whether democracy's forward momentum has shifted into reverse (Lührmann and Lindberg 2019) or merely leveled off (Little and Meng 2024), there is little doubt that democratic regimes are on the defensive in much of the world, facing novel challenges and uncertainties.

The annual reports of global research and tracking agencies like V-Dem (Varieties of Democracy Institute) and Freedom House have sounded alarm bells, as their ratings of democratic practices and political and civil liberties, respectively, show a steady erosion of democratic standards on a global scale in the early twenty-first century. Freedom House (2024: 2) has recorded eighteen consecutive years of declines in its global index of political rights and civil liberties, with more countries restricting than expanding freedoms every year since 2006. V-Dem's comprehensive dataset based on expert surveys shows the number of countries meeting the minimum threshold for democracy peaking at 100 in 2011 (Mechkova, Lührmann, and Lindberg 2017: 163), then falling gradually to 91 countries by 2023 (Nord et al. 2024: 11). In 2023, V-Dem

identified forty-two countries moving in an autocratic direction, and only eighteen countries expanding democratic practices, a striking reversal of the trend lines found at the beginning of the century. Cross-national patterns of autocratization helped bring V-Dem's 2023 average country score on its core Liberal Democracy Index back down to the level of 1998, while its global population-weighted average – heavily influenced by India's democratic decline – fell back to the level of 1985 (Nord et al. 2024: 7, 9–10).

Dire warnings of a global democratic retreat, however, have been countered by scholars who question the generalizability of the trend, the reliability of backsliding measures, and the inflated impact of the Indian case on global measures weighted by population. Little and Meng (2024) have challenged V-Dem's reliance on subjective expert assessments of democratic practices rather than objective empirical indicators, suggesting that the former may be susceptible to shifting coder standards that produce time-varying coder bias (see also the symposium "Comment and Controversy," 2024). Studies by Miao and Brownlee (2022), Levitsky and Way (2023), and Treisman (2023) have emphasized the continued resilience of democracy in affluent societies, suggesting that democratic breakdowns are largely confined to countries at lower levels of economic development.

This vigorous debate over the measurement, extent, and scope conditions of democratic backsliding is much welcomed. Indeed, the debate attests to the significance of the subject matter, and to the urgency of understanding the underlying causal processes and political dynamics associated with democratic backsliding. Only then is it possible to identify the factors that make societies more or less susceptible – or resistant – to backsliding pressures, and to assess the effectiveness of different strategies to contain and reverse democratic decline. As Little and Meng (2024: 2) suggest, "Although a correct accounting of global trends is a key first step, it is arguably more important to understand where backsliding is happening, how it happens, and when it leads to democratic breakdown."

This volume addresses these questions from a cross-regional comparative perspective, recognizing that contemporary patterns of democratic backsliding have defied political expectations along multiple fronts. They have challenged assumptions that new democracies were destined to progressively, if fitfully, stabilize or "consolidate" over time. Recent democratic setbacks, moreover, have not been limited to the more institutionally fragile cases of third-wave democracies; significant democratic erosion has also occurred in countries once thought of as regional leaders or showcases of democracy, such as Hungary and Poland in Eastern Europe, Venezuela and Brazil in Latin America, India in South Asia, Benin in Africa, and Turkey and Tunisia in the Middle East and North Africa. Arguably, that list should be extended to include the liberal hegemon itself, the US (Mettler and Lieberman 2020; International Idea 2021). This short list includes the country long considered to be the world's largest and most diverse democracy (India), as well as the world's oldest and

most economically powerful democracy (the US). In short, democratic erosion has afflicted countries at relatively advanced levels of economic development (Riedl et al. 2023), as well as those with long-standing democratic traditions. Although democratic breakdowns are a rarity (to date) in affluent societies, a troubling number of them are struggling to contain the growing presence and political weight of actors with illiberal or manifestly autocratic tendencies. Such patterns cast doubt on the scholarly conventional wisdom that prosperity immunizes countries against the threat of democratic breakdown (Przeworski et al. 2000; Przeworski 2005), or that "stability breeds stability" (Linz 1978: 8).

Adding to the puzzle, in many countries the principal challenges to democracy did not arise from actors *outside* the democratic order – that is, from militaries or insurgent groups seeking to topple a democratic regime through a coup or revolution. Instead, the challenges emerged endogenously from *within* democratic regimes themselves, as leaders and parties competing in the democratic arena exploited regime institutions to concentrate powers, marginalize opponents, and neutralize or dismantle essential checks and balances (Bermeo 2016; Levitsky and Ziblatt 2018; Mounk 2018; Haggard and Kaufman 2021). Svolik (2019b: 20) aptly characterizes such endogenous backsliding as "the subversion of democracy by democratically elected incumbents" – paradoxically, identifying a democratic counterpart to earlier scholarly work which suggested that communist governing institutions were, over the long term, subversive and self-negating of their own political logic (Bunce 1999). Explaining when and why democratic institutions become subversive and self-negating – rather than a self-enforcing equilibrium (Weingast 1997; Przeworski 2005; Svolik 2019a) – has emerged as a pressing concern, and an analytical centerpiece in this volume. Whether democratic backsliding is attributable to political polarization, cultural rifts, performance crises, institutional defects, or tensions arising from social and economic inequalities, its causal logic and dynamic properties cry out for scholarly attention.

Needless to say, this democratic path to autocracy is far from universal, and (fortunately) it is rarely, if ever, uncontested. Rival parties, government and judicial officials, voters, civil society networks, the media, and social movements invariably push back against ascendant autocrats, albeit with varying degrees of success. In many countries, the US included, societal actors in resistance to aspiring autocrats do not simply aim to preserve historic democratic gains, but to advance toward new democratic breakthroughs that could make existing representative institutions more inclusive, equitable, or participatory (Meyer and Tarrow 2018). The outcomes of these struggles are often unpredictable, as they rest heavily on the balance of institutional leverage, societal support, and the mobilizational capacity of autocratizing and democratizing forces. Even in the midst of democracy's recent global "recession" (Diamond 2015), countertrend cases moving in a prodemocratic direction can be found (Carothers and Feldman 2023), albeit predominantly in

smaller countries with less weight on the international stage, as V-Dem notes (Alizada et al. 2021: 7).

Such contradictory processes and countervailing pressures do not lend themselves to easy conceptualization and theorization. Indeed, they clash with some of the dominant ways of thinking about democracy – heavily conditioned by Cold War-era conflicts – that informed much of our leading scholarship during the heyday of the third wave. As Carothers (2002) aptly forewarned, recent political events pose formidable challenges to modes of theorizing about democracy that rely on linear or teleological assumptions about democratic endpoints; static notions of democratic consolidation; the self-enacting resiliency of institutional checks and balances; and endogenous processes of democratic norm construction and behavioral conformism (see the sections below). They have also forced scholars to reassess the nature and sources of the threats to democracy, recognizing that the central challenge is not always to induce the compliance of those who *lose* elections (Przeworski 1991: 15), but rather those who emerge victorious and try to turn the transitory institutional leverage of incumbency into a source of permanent competitive advantage (Singer 2018). There is, then, both a "loser's dilemma" and a "winner's dilemma" embedded in the study of democratic resiliency. If the third wave of democratization in the late twentieth century demonstrated the fallacy of believing that democracy has rigid structural or cultural preconditions – such as particular levels of economic development, class configurations, or civic cultures (Schmitter and Karl 1991) – recent patterns of backsliding have revealed the contingent and potentially contested underpinnings of democratic institutions in *any* political order, given the presence (whether latent or active) of markedly authoritarian political and cultural currents.

In short, contemporary political conflicts call for a reassessment of the analytical cornerstones for the study of democratic resiliency and backsliding. Building on foundational works in the study of democratization and democratic theory, we argue that these cornerstones should include: (1) the contingency of the political pacts or compromises, the behavioral norms, and the competitive equilibria that undergird democratic regimes; (2) the countervailing roles of individual and collective actors who challenge or defend the institutional arrangements of any established democratic order, typically by seeking to expand or restrict democratic inclusion and contestation; and (3) the dynamic processes that make democracy a perpetual work in progress. As Tilly (2007: xi) recognized, "democratization is a dynamic process that always remains incomplete and perpetually runs the risk of reversal."

So conceived, this volume suggests that democracy is best understood not as a standardized regime template or a static endpoint of political development, but rather as a dialectical frontier that advances – and sometimes recedes – by fits and starts, according to the dynamic interplay of these countervailing forces. To be sure, the relative strength of pro- and antidemocratic forces – and, therefore, the levels of democratic contingency and resiliency – varies

considerably across cases. But so also does it vary over time within any given country, as the metaphor of a dialectical frontier suggests. The resiliency of the political bargains that undergird any democratic order rests heavily on the iterative character of the open competition for public office that secures the adherence of rival political actors. It is precisely this iterative process of democratic contestation that backsliding undermines.

1.1 CONSTRUCTING AND DECONSTRUCTING DEMOCRATIC ORDERS

Drawing from his extensive statistical analysis of democratic transitions and breakdowns around the world historically, one of the most eminent scholars of comparative politics, Adam Przeworski, calculated the odds of democracy breaking down in the US as 1 in 1.8 million country years, given the country's advanced level of economic development (and not even factoring in the long-standing duration of its democratic regime; see Przeworski 2019: 133). Although President Donald Trump did not beat those astronomical odds in his first term, it was not for lack of trying; comparativists readily recognized Trump's efforts to overturn the November 2020 election results as what is known in Latin America as an *autogolpe*, or executive "self-coup," whereby an incumbent president seeks to break with the constitutional order to concentrate powers or avoid leaving office (Tufekci 2020; Cameron 2021).[1] More troubling, perhaps, Trump's ill-fated power grab, which culminated in a violent mob assault on the national legislature, could not be shrugged off as the desperate gambit of a rogue president or sore loser. His Republican co-partisans in Congress largely supported or tolerated his efforts to overturn the official election results, and the bulk of the party closed ranks behind Trump to block his removal from office via impeachment, opted out of congressional investigations of the assault on the national capitol, and adopted a series of restrictive voting laws in the states they controlled. Indeed, the GOP (Grand Old Party) sought to remove subnational election officials charged with certifying the vote and install party loyalists. Trump's hold over the Republican Party base positioned him to be the frontrunner for the party's presidential nomination in 2024 while he was facing four criminal indictments involving eighty-eight felony charges ("Tracking the Trump Criminal Cases" 2024) – and threatening to unleash the Justice Department on his political adversaries if he returned to presidential office. Ultimately, neither Congress, the Supreme Court, the Republican Party, nor the electorate deemed Trump's efforts to block democratic alternation in office by electoral means to be disqualifying for subsequent participation in the democratic process, and voters opted to return him to the White House in the November 2024 elections. The kind of

[1] The model of an *autogolpe* is certainly not without historical precedents; see, for example, Karl Marx's classic account of Louis Bonaparte's self-coup in *The Eighteenth Brumaire of Louis Bonaparte* (New York: International Publishers, 1963).

breakdown that Przeworski (2019: 133) dismissed as "out of the realm of the imaginable," based on historical precedents, apparently no longer is.

Przeworski (2019: 18–19) himself questioned whether "history is a reliable guide to the future" – a query worth bearing in mind when statistical projections from the historical record offer reassurance that democracy is impregnable in affluent societies. Much greater attention should be paid to the historical structural and institutional conditions that helped stabilize Western democracies in the postwar era; do their causal mechanisms remain operative in the contemporary period of globalized financial capitalism, diminished state sovereignty, transnational population flows, uprooted party systems, increasingly concentrated wealth, and rising economic precarity? If they do not – if contemporary democracies face a different problem set than their twentieth-century predecessors – mechanistic projections of historical regularities to the present and future are unconvincing and potentially misleading.

Political science offers no ready-made formulas for sustaining democracy in a two-party system like that of the US where one of the major parties has become an insurgent actor, or a political vessel for those who are. Indeed, in his classic study of democratic breakdowns, Juan Linz (1978: 24) declared that a two-party system subject to "maximal ideological distance" and "centrifugal competition" is destined for either self-destruction or civil war.[2] Political scientists are hard-pressed to explain how a long-established – and supposedly "consolidated" – democracy could not only give rise to the kinds of autocratic forces seen in the US today, but also entrench them in governing institutions where they can subvert democracy from within. The US case thus poses in stark relief some of the limitations of conventional theorizing about democracy and democratization. If democracy is understood to be consolidated when it becomes, metaphorically, "the only game in town" (Przeworski 1991: 26; Linz and Stepan 1996: 5; Schedler 1998: 91), what causes other, nondemocratic "games" to emerge on an established democratic playing field, "deconsolidating" democracy? What induces parties and politicians embedded and socialized within a democratic order to violate its norms and begin playing by a different set of rules, or no rules at all? Why do large numbers of citizens vote for such actors rather than punish or eschew them, and how do democratic institutions – such as parties, legislatures, elections, and courts – get repurposed or "weaponized" to perform autocratic political functions quite different from those they were set up to perform?

Leading studies of democracy and democratization have long been cognizant of the regime's limited reach and contingent character. O'Donnell and Schmitter

[2] Writing during the early stages of rising partisan polarization in the US, Linz (1990: 53) also suggested that American democracy had avoided the destabilizing "perils of presidentialism" precisely *because* of "the uniquely diffuse character" of its moderate, two-party system with centripetal competitive dynamics in the postwar era.

(1986) emphasized the tentative, uncertain, and indeterminate course of democratic transitions; Linz and Stepan (1996: 6) recognized the potential for democratic deconsolidation; Levitsky and Way (2010) explained why regime transitions often culminate in hybrid forms of competitive authoritarianism rather than liberal democracy; and Carothers (2002), Tilly (2007), Bermeo and Yashar (2016), Ziblatt (2017), and Berman (2019) highlighted the trial-and-error logic, and the zigzagging course, of historical processes of democratization. Such caveats, however, were easy to overlook as the third wave of democratization spread across the globe at the end of the Cold War – a time when the major ideological rivals to liberal democracy weakened or collapsed internationally, and Western democracies were seemingly uncontested in their national settings. Scholars aptly characterized the third wave as "the greatest period of democratic ferment in the history of modern civilization," and they lauded its "snowballing" effects as it diffused across countries and regions (Diamond and Plattner 1993: ix). As stated by Plattner (1993: 28), the demise of communism left liberal democracy as the "dominant principle of political legitimacy," providing it with "unchallenged preeminence" in a world with "no serious geopolitical or ideological rivals" (Plattner 1993: 28).

More recent processes of democratic backsliding have shattered this optimism, and made it imperative to reassess our understanding of democracy's cornerstones, institutional resiliency, and potential frailties. A useful starting point is Przeworski's (1991: 10) pithy definition of democracy as "a system in which parties lose elections." By stripping democracy to its bare essentials – competitive elections where somebody wins, and others must lose – this definition offers a window on two central challenges in the study of democratic resiliency, what might be labeled the "loser's dilemma" and the "winner's dilemma." The loser's dilemma is centered on the challenge of inducing democratic participation and compliance with democratic outcomes among those who lose elections or have little expectation of prevailing in the electoral arena (see Anderson et al. 2005; Wong and Friedman 2008). Przeworski (1991: 15) flagged this challenge as *the* central question "concerning the durability of democracy." Given the uncertainty surrounding democratic outcomes and the inevitability of electoral defeats, political actors with little chance of winning elections – in particular, elite actors who are, by definition, few in number – may forego the democratic process and invest in military, economic, or other power resources that can secure their dominance through authoritarian means (Gibson 1996; Ziblatt 2017).

Although Przeworski paid less attention to the winner's dilemma, he clearly recognized it. "The central difficulty of political power," he asserted, "is that it gives rise to increasing returns to scale" (Przeworski 1991: 25). The dilemma, then, consists of the possibility that the victors in any round of democratic contestation will try to capitalize on their success by tilting the playing field and locking in competitive advantages. The threat to democracy comes not from

those who fear losing and refuse to subject their vital interests to the uncertainties of electoral contestation, opting instead for authoritarian alternatives; rather, the threat arises from those who win elections and exploit the advantages of incumbency to concentrate powers and erode institutional checks and balances. The latter is the primary logic of subverting democracy by endogenous means.

1.1.1 The Third Wave and the Loser's Dilemma

Given its focus on democratic transitions and consolidation, scholarship on the third wave of democratization naturally gave priority to resolving the loser's dilemma. This dilemma crystallized as the third wave spread from Southern Europe in the mid-1970s to Latin America in the 1980s and much of Eastern Europe, East and Southeast Asia, and Africa in the late 1980s and 1990s. These were regions of the world notably lacking some or all of the historical, structural, and cultural conditions long presumed to have been vital to the gestation of liberal democracy in its North Atlantic bastions (Bermeo and Yashar 2016), such as industrialization and economic development, vibrant civil societies, and liberal or tolerant civic cultures (see, for example, Lipset 1959; Almond and Verba 1963; Moore 1966; Rueschemeyer, Stephens, and Stephens 1992; Ansell and Samuels 2014). Although broad-based civic movements for democratization were a driving force in many regime transitions, especially in Eastern Europe (Bunce 2003), important actors with authoritarian pasts nearly always remained on the political stage as democratic regimes were being constructed (Grzymala-Busse 2002; Riedl 2014; Albertus and Menaldo 2018; Loxton 2021).

Scholarship on democratic transitions, therefore, centered on the challenge of constructing democratic regimes in "unlikely places" – that is, in countries and regions that lacked many of the putative preconditions for liberal democracy. Indeed, it often endeavored to explain how to build "democracy without democrats," in the absence of strong democratic civic cultures, and in the presence of political actors who were antidemocratic (perceiving electoral contestation to be an existential threat to their interests) or, at best, contingent democrats. The latter included actors willing to cooperate with or provide cover for antidemocratic forces in pursuit of their political goals (the "semi-loyalists," in Linz's [1978: 32] terminology), as well as those who might only accept democratic contestation when it produced outcomes to their liking. An overriding concern of "transitologists," therefore, was to induce participation and compliance with democratic processes among those who expected to lose elections and lacked principled commitments to the regime form.

The loser's dilemma elicited three basic responses in the study of third-wave democracies: political pacts, strategic equilibria, and endogenous norm construction. All three responses were informed by a prescient article by Dankwart Rustow (1970) that anticipated and influenced a generation of

scholarship on regime transitions. Rustow offered a compelling account of how democracy could be established in unlikely places, among distrustful political antagonists, in the absence of favorable preconditions beyond a shared understanding of the boundaries and composition of the national political community. In this account, polarized conflict and gridlock – what Rustow (1970: 355) characterized as a "hot family feud" – were the logical precursors to democratization, rather than a prior normative consensus or a social contract. Democracy was forged by institutional compromises between elite political adversaries who could not impose their preferred – often nondemocratic – order on rivals. It was, then, a "second-best" choice for the major actors, a set of institutions designed to process, regulate, and bound political contestation that otherwise threatened to spiral out of control with mutually destructive consequences.

Securing mutual adherence to the terms of a democracy's institutional compromise was the obvious catch, given the uncertainties of democratic contestation and the inevitability that some actors would lose competitive elections. For O'Donnell and Schmitter (1986: 37–47), the answer to this dilemma lay in the negotiation of explicit political pacts between rival elites that reduced uncertainties and offered mutual guarantees for vital interests. This could be done, for example, by bounding competition, narrowing the issue domain, and/or sharing power. To induce elite compliance, especially where authoritarian regimes had relied on the support of conservative military and economic establishments, transitional pacts often required that mass-based parties exercise self-restraint in their mobilization of electoral support or social demands in the democratic arena. As O'Donnell and Schmitter (1986: 38) readily acknowledged, such pacts were "undemocratic" means of constructing democracy, even if they were instrumental to the participation of recalcitrant elites. Pacts also created the risk that short-term constraints on democratic participation or contestation adopted to facilitate a regime transition might become institutionalized over time, creating fault lines in the new democratic order that generate iterative forms of social and political conflict (Karl 1987). We will return to this point in Section 1.2.

Przeworski (1991; 2005) offered a second response to the loser's dilemma, arguing that it was possible to achieve mutual compliance as a strategic equilibrium in the absence of either explicit pacts or consensual democratic norms. Formulating Rostow's argument in game theoretic terms, Przeworski (1991: 12) conceptualized democracy "as a system of processing conflicts" by subjecting rival actors and their interests to institutionalized competition. This system, he argued, could be established – and consolidated – as a self-enforcing strategic equilibrium between rival, self-interested actors when iterative cycles of the democratic "game" lengthen actors' time horizons and lower the stakes of losing in any particular electoral contest (see also Weingast 1997 and Svolik 2019a). Rival actors, therefore, comply with the rules of competition, tolerate a measure of uncertainty, and consent to losing so long as they get to play the

game again in future iterations (Przeworski 1991: 26–34) – and, critically, so long as incumbents do not try to rig the game by turning transitory victories into permanent competitive advantages.

This conceptualization of democracy's genesis had widespread appeal, as it did not restrict the regime type to countries endowed with a favorable set of preconditions by historical experiences or cultural endowments. Neither did it require that bitter rivals negotiate and settle on the terms of a foundational pact. Democracy could emerge virtually anywhere as a mode of conflict regulation and generalized "contingent consent" to iterative and institutionalized political contestation (Schmitter and Karl 1991: 82–83).

Nevertheless, many scholars remained skeptical of the resiliency of democratic regimes that rested solely on a decentralized strategic equilibrium. Przeworski himself recognized structural or material constraints on the prospects for sustaining such a self-enforcing equilibrium, arguing that poor countries have a much narrower bound of actor distributional incentives to comply with it, making democratic regimes inherently fragile. By contrast, in wealthy countries loss aversion – the risk of losing what has been gained – makes democracy so "impregnable" that it "lasts forever" once established (Przeworski 2005: 253). Focusing on ideational rather than material foundations, Mainwaring and Pérez-Liñán (2013: 53) claimed that "democracy without democrats" may be possible, "but it is likely to be a very fragile equilibrium." To buttress that equilibrium and move toward a more durable consolidation of democracy, normative underpinnings might be needed to provide an ideational protective belt that restrains self-interested actors and safeguards institutional practices.

As Linz and Stepan (1996) argued, democratic consolidation has behavioral and attitudinal as well as institutional dimensions. It exists when "no significant political groups seriously attempt to overthrow the democratic regime or secede from the state"; when "the overwhelming majority of the people believe that any further political change must emerge from within the parameters of democratic formulas"; and when "all the actors in the polity become habituated to the fact that political conflict will be resolved according to established norms and that violations of these norms are likely to be both ineffective and costly." Consolidation signifies, therefore, that democracy has become "routinized and deeply internalized in social, institutional, and even psychological life, as well as in political calculations for achieving success" (Linz and Stepan 1996: 5). Such internalization requires "serious thought and action concerning the development of a normatively positive appreciation of those core institutions of a democratic political society" (Linz and Stepan 1996: 8).

Developing this normative appreciation among self-interested rivals is no easy matter when democratic competition produces losers as well as winners. It is surely not an automatic process where democracy has emerged instrumentally as an institutional compromise to process and regulate political conflict. Nevertheless, Rustow (1970) offered a third response to the loser's dilemma –

a framework for understanding how democratic norms could develop endogenously through the very logic of democratic competition itself, even where these norms were in embryonic form at the outset of a democratization process. Rather than being a precondition or a proximate cause of democratic rule, Rustow believed, democratic civic cultures could be a fortuitous byproduct of the institutional arrangements that incentivize democratic practices. The practice of resolving political conflicts by institutionalized means could generate norms endogenously through processes of joint political learning, confidence building, and democratic habituation. Through positive feedback loops, these norms could then reinforce and reproduce democratic behavior over time. "Both politicians and citizens," Rustow argued, can "learn from the successful resolution of some issues to place their faith in the new rules and to apply them to new issues." Such political learning could even generate a "double process of Darwinian selectivity in favor of convinced democrats: one among parties in general elections and the other among politicians vying for leadership within these parties" (Rustow 1970: 358–360).

This type of endogenous process allows political actors to be transformed over time as they adapt their leadership, organization, ideology, and strategic behavior to a new set of incentives shaped by contingent consent and institutionalized modes of contestation. Levitsky and Ziblatt trace the development of the essential democratic norm of mutual tolerance to just such an endogenous process in early US political history. "It was only gradually," they argue, "over the course of decades, that America's opposing parties came to the hard-fought recognition that they could be rivals rather than enemies, circulating in power rather than destroying each other" (Levitsky and Ziblatt 2018: 103). Likewise, the norm of forbearance, or self-restraint in the exercise of institutional prerogatives, was a learned and habituated code of conduct, often relying on unwritten rules that "serve as the soft guardrails of democracy, preventing day-to-day political competition from devolving into a no-holds-barred conflict" (Levitsky and Ziblatt 2018: 101). More recently, Lindberg (2006: 149) has argued for a similar process of endogenous norm development in Africa during the third wave of democratization, suggesting that "the incentives structures of electoral institutions tend to pull elites together rather than divide or disperse them." Actors "learn the rules through experience," Lindberg argues, "and their calculations change once they realize that the process is continuous." Political learning thus makes elections "self-reinforcing and self-improving," and causes "democratic qualities in society to expand and deepen" (Lindberg 2006: 108, 157).

Crucially, under such processes of endogenous norm construction, democratic compliance does not rest solely on political goodwill or collegiality. Once established, democratic norms alter actors' calculations of their self-interests and the expected utility of alternative courses of action. Violators can expect to be punished or ostracized by other actors (see Weingast 1997), and as Rustow's double Darwinian metaphor suggests, they

may be placed at a competitive disadvantage in both intraparty and inter-party selection processes. Norm compliance, in other words, is rewarded by voters and other political actors, rather than exploited by rivals.

These various responses to the loser's dilemma provided grounds for cautious optimism as democratic transitions unfolded during the third wave and – in some countries, at least – appeared to be progressing toward consolidation (Lindberg 2006; Mainwaring and Pérez-Liñán 2013). Nevertheless, contemporary processes of democratic backsliding suggest that different "solutions" to the loser's dilemma may ultimately be vulnerable to the winner's dilemma. This vulnerability raises questions about the analytic utility of "consolidation" conceived as a static endpoint of political development. It also raises the disturbing possibility that Rustow's endogenous process of norm construction, with its double Darwinian selection mechanisms, could actually shift gears and reverse course, generating endogenous patterns of democratic erosion or backsliding. It is to these challenges that we now turn.

1.1.2 The Winners' Dilemma and Democratic Backsliding

As Grief and Laitin (2004: 634) argue, institutional equilibria are stable and self-enforcing under a greater or lesser range of conditions, but they can become "self-undermining" when "the behaviors that they entail . . . cultivate the seeds of their own demise." Such is the logic of endogenous institutional subversion, as depicted in Bunce's (1999) analysis of the demise of communist single-party rule. It is also the logic of Svolik's account of backsliding as "a vulnerability . . . inherent to democratic politics" (Svolik 2019b: 23), driven by the competitive interaction of players within democratic institutions. This logic recognizes that the mutual compliance associated with democracy's strategic equilibrium is vulnerable to a number of basic shifts in competitive dynamics – for example, major shifts in the power balance between rival actors, the ideological differences that demarcate and align their respective social blocs, their capacity to impose costs on – or reap rewards from – noncompliance, or the political mobilization of previously excluded or subaltern groups (and the counter-mobilization of those resistant to sharing the democratic stage). Any of these shifts can alter political actors' strategic calculations of the expected utility of alternative courses of action, whether compliant or noncompliant with democratic rules. In so doing, they may also reveal the boundaries and contingencies of the political bargains, whether tacit or explicit, that undergird any historically contextualized democratic equilibrium, and of the normative scaffolding that surrounds it.

The winner's dilemma is centered on the understanding that political power is susceptible to increasing returns to scale (Przeworski 1991: 25), whereby the victor in any given cycle of democratic contestation transforms the transitory institutional prerogatives of incumbency into sources of cumulative and potentially permanent competitive advantage. Examples are legion, but they

include efforts to stack the courts, assert partisan control over electoral commissions and oversight agencies, politicize the bureaucracy to capture and distribute partisan rents, gerrymander districts, restrict voting eligibility or procedures, purge electoral lists, alter party registration rules or seat allocation formulas, and impose financial or regulatory constraints on independent media and civil society organizations. Paradoxically, attempts to secure increasing returns flip Przeworski's intertemporal solution to the loser's dilemma on its head; whereas iterative cycles of democratic contestation provide incentives for losers to remain in the democratic game, they create inducements for winners to *rig* the game by tilting the democratic playing field for future iterations. Efforts to secure increasing returns, or mere suspicions that rival actors harbor such intentions, are clearly highly polarizing, as they raise the stakes of any cycle of democratic contestation and shorten actors' time horizons. Indeed, they can transform free and fair electoral contestation into a single-shot, winner-takes-all exercise. As such, they destabilize the competitive equilibrium and political stalemate that Rustow (1970) saw as the genetic foundations for democratic institutions.

Under Rustow's formulation, the endogenous development and internalization of democratic norms – in particular, the norm that Levitsky and Ziblatt labeled forebearance, or self-restraint – would provide an antidote to the winner's dilemma, or incumbency-induced efforts to secure increasing returns. Actors who refused to comply with such norms would be selected out of leadership roles by placing themselves at a competitive disadvantage in both intra- and inter-party contests. Przeworski, on the other hand, believed democracy's strategic equilibrium was self-enforcing, and therefore not dependent on leaders' normative commitments; increasing returns could be contained by institutional designs to disperse power, and by civic opposition (Przeworski 1991: 25–26).

Indeed, the winners' dilemma has a time-honored institutional antidote – namely, the separation of powers and institutional checks and balances on political authority. This antidote is deeply rooted in the liberal tradition of Montesquieu and Madison, with its distrust of popular majorities and concentrated power. In this tradition, the primary safeguard against increasing returns or abuses of power is the dispersion of political authority across multiple and independent institutional sites. A constitutional framework for limited government and the rule of law, along with strong legislative bodies, an independent judiciary, and federal institutions, are all designed to fragment or disperse authority, lower the stakes of competition, and place institutional constraints on the prerogatives of incumbency.

Madison (1787) was famously wary of parties or "factions" in pursuit of narrow interests or passions, and he placed his confidence in a plurality of societal interests and the separation of powers to preclude the emergence of any dominant political faction. The rise of modern parties, however, can change the equation, as they allow aspiring autocrats with broad popular appeal to capture, concentrate power, and coordinate across multiple institutional sites – from executive offices

to legislative bodies, the courts, watchdog agencies, and electoral commissions. A disciplined and opportunistic party with autocratic leanings can thus undermine the separation of powers and progressively neutralize the checks and balances that are essential for horizontal accountability. Indeed, parties can become instruments of Przeworski's increasing returns to political power; no institutional design guarantees that a majoritarian party or movement will not employ the institutional prerogatives it enjoys to gain control over the courts and electoral institutions, rewrite or reinterpret laws and constitutions, chip away at opposition political rights and the independence of the media, and tilt the democratic playing field in ways that lock in competitive advantages.

In short, institutional checks and balances are neither automatic nor self-enacting. Institutional sites are occupied by political actors with varying degrees of commitment to their parchment functions or original intent, and checks only become operative when their occupants choose to exercise them. Rather than safeguarding democracy, they may be transformed into shields that insulate incumbents from democratic oversight and accountability, or even repurposed into instruments of partisan advantage. Such institutional polymorphism lies at the heart of endogenous processes of democratic subversion, and it illustrates the inherent limitations of more essentialist conceptions of regime checks and balances. Efforts to repurpose and weaponize institutions inevitably politicize them, transforming routine political contests into highly polarizing, existential battles where victors enjoy increasing returns, and transitory losses carry the risk of permanent subjugation. Such high-stakes battles undermine the iterative character of democratic competition and the intertemporal perspectives that are essential for reproducing actors' contingent consent (Przeworski 1991: 29).

Rustow's endogenous model of democratic consolidation, through its "double process of Darwinian selectivity," assumes that parties and voters will punish, or at least weed out, autocrats who attempt to weaponize institutions to achieve increasing returns. Endogenous processes of democratic backsliding, however, demonstrate that competitive dynamics do not always favor committed democrats in either intraparty or inter-party contests. Survey experiments conducted by Krishnarajan (2023) across 23 countries discovered a consistent pattern of perceptual bias and political rationalization, whereby citizens' policy preferences conditioned their perceptions of democratic and antidemocratic behavior. Albertus and Grossman (2021) found that although most citizens in Brazil, Argentina, Mexico, and the US recognized and disapproved of transgressions against democracy, a sizeable minority of citizens in each country supported them; partisans of the incumbent were more willing to support transgressions, while substantial majorities opposed punishments like impeachment outside the ballot box.

As Svolik argues in his analysis of democratic subversion in Turkey, Hungary, and Venezuela, endogenous backsliding does not require that citizens fail to recognize leaders' autocratic tendencies or prefer autocracy over democracy. It only requires a context of acute social and/or political polarization that "presents

aspiring authoritarians with a structural opportunity." In such contexts, "even voters who value democracy will be willing to sacrifice fair democratic competition for the sake of electing politicians who champion their interests. When punishing a leader's authoritarian tendencies requires voting for a platform, party, or person that his supporters detest, many will find this too high a price to pay" (Svolik 2019b: 24). Democratic subversion, therefore, does not require a mass party of committed authoritarians.

Svolik's (2019b: 24) trade-off between democratic principles and partisan interests can exist within party organizations as well as the general public. Clever autocrats – like Hungary's Viktor Orbán – find ways to progressively dismantle democracy without openly breaking the law, using every democratically accessed institutional site to reconfigure the playing field. They are accompanied and enabled not only by coteries of ideologically hardened fellow travelers and sycophants, but by extensive circles of contingent but opportunistic democrats whose career or policy interests are advanced by towing the party line. The latter may balk at blatantly stolen elections or violent assaults on government institutions, but they are likely to tolerate myriad forms of democratic enfeeblement, incrementally enacted, when they serve other interests (see Singer 2018). These co-partisans do not think of themselves, nor recognize their party, to be authoritarian – but they may allow democracy to be progressively subverted, as Przeworski (2019: 176–183) put it, by stealth, with no clear line in the sand to demarcate when a political order has ceased to be democratic.

1.1.3 Backsliding and the Boundaries of National Political Communities

The process of democratic backsliding can take many forms, and as the preceding section suggests, it frequently takes place within the established (formal) rules of the game for democratic contestation. The institutional forms of political competition do not necessarily change, nor do most of the rules for electoral competition. Rather, the informal practices of democratic politics tend to erode first – that is, the practices that govern how people participate in politics, and determine whose voices are heard in the democratic arena. Left unchecked, backsliding may progress slowly and gradually until electoral competition itself is severely compromised, and both vertical (electoral) and horizontal (institutional) mechanisms of accountability are seriously impaired (O'Donnell 1994).

Given its multiple dimensions in both civic and institutional arenas, we see a narrow focus on electoral competition as missing a key dynamic in democratic backsliding over the past twenty years. Much as Schmitter and Karl (1991) identified a "fallacy of electoralism" in identifying what constitutes democracy, we see a fallacy of electoralism in locating the sources of democratic backsliding. We turn instead to the work of democratic theorists like Robert Dahl (1971) and Dankwart Rustow (1970), who emphasized the importance of

inclusive citizenship within the accepted bounds of a political community as a key prerequisite – or for Rustow, *the* key prerequisite – for sustainable democracy. In our analysis, democratic backsliding in the modern world often starts with the unwinding of a consensus about who is a "true" citizen and whose voice should legitimately be heard in democratic politics.

In this analysis, the rise of exclusionary forms of populism (Mudde and Rovira Kaltwasser 2013) in the US, Europe, Latin America, and elsewhere often has an organic link with democratic backsliding. Populists mobilize their supporters by identifying a pure people who can be arrayed against a corrupt elite, as well as against supposed outsiders or "impure" people whose behavior or identity is incompatible with the will of the true people. In the US, for example, the long-standing argument that immigration is an existential threat to American democracy – a view most closely identified with the Republican Party of Donald Trump – capitalizes on the idea of a "real" American people under threat from outsiders entering the country. In analogous ways, beliefs about a "replacement" of white Americans by an anonymous "other" – people of color, religious minorities, progressives who seek radical political change – portray white Americans as the true Americans, and others as a nonbelonging and undeserving "something else" whose participation in democratic politics creates an existential threat to democracy itself (Parker and Barreto 2013; Hochschild 2018).

Processes of defining the national body politic in ways that exclude imagined others can be found in many other national contexts. Anti-immigrant and anti-minority views have long been common among populist radical right parties in Europe, and those like the Party for Freedom (PVV) in the Netherlands and the Freedom Party of Austria (FPÖ) propose that these outsiders comprise a threat to the national body politic that justifies an exclusionary response (see Goodman 2019). Democratic backsliding under the Modi government in India has been abetted by the mobilization of exclusionary Hindu nationalist identities that challenge the citizenship rights of Muslims, as Milan Vaishnav explains in this volume (Chapter 2). In Thailand, phrases like "Thai-style democracy," usually associated with the Crown and the bureaucracy, imply that there is a form of politics which is essentially Thai in character (see Hewison and Kitiriangiarp 2010 for a discussion). As a consequence, those Thai citizens whose vision of democratic politics demands thorough going reform to the country's conservative establishment institutions are demonstrating themselves to be *not Thai*, and hence not deserving of a voice in democratic politics. In the Philippines, Duterte's murderous war against drug dealers and drug users configures vice crimes as threats to the country's political order, and those who commit them as enemies of the Philippine people (see Pepinsky 2017; 2020). In Indonesia, followers of unrecognized religious traditions – such as Ahmadis and Shia – face state discrimination for having violated the country's normative understanding of what religions Indonesians may profess, and hence lying outside of the country's normal democratic political order. In Latin America, as

Lindsay Mayka explains in Chapter 7 of this volume, conservative populist figures like Brazil's Jair Bolsonaro exploit widespread fear of crime and violence to challenge the citizenship rights of poor and often racialized youth, questioning their belonging to the national political community.

What these diverse examples share is a common logic of political exclusion: holders of particular views or people holding particular identities fall outside of the boundaries of the national political community by writ of their views and identities themselves. Just as Rustow and others argued that the sole precondition for democracy is agreement on the bounds of the political community, sowing discord about where those boundaries lie is the first step in undermining that consensus which forms the bedrock for democratic political competition. Efforts by those who face exclusion to claim their legitimate place *within* the democratic system, in turn, may precipitate efforts by antidemocratic forces to restrict political participation – using tools in Schedler's (2002) "menu of manipulation" but drawing, as many electoral authoritarian regimes do, on legal principles to control political competition. This logic of exclusion and democratic erosion is best understood as running Rustow's process-based account of democratization in reverse: rather than an emerging consensus on the boundaries of the political community preceding democratization, the politicization of the boundaries of the political community undermines the agreement necessary for democratic competition to resolve political differences.

1.2 DEMOCRACY'S DIALECTIC

When incumbents are determined to narrow the boundaries of the political community and/or repurpose institutions to allow increasing returns to power, the resiliency of democratic rule hinges on the strength of civic and political actors in resistance, and on their ability to maintain access to, and the independence of, key institutional sites. The dialectical interplay between these countervailing forces is qualitatively different from that which occurs under "routine" – that is, institutionally "consolidated" and normatively bounded – democratic competition between partisan rivals. The interplay is not merely programmatic or policy-based, but constitutive in character, as it politicizes the very composition, functions, and operative rules of essential regime institutions. Its stakes, therefore, are orders of magnitude higher; when incumbents commit to eviscerating checks and balances, social and political actors in resistance are likely to seek major overhauls of regime institutions that harbored or enabled the rise of antidemocratic forces. Contemporary political conflict in the US provides ample evidence of such constitutive and dialectical interplay, as the rules surrounding the composition of the Supreme Court, electoral institutions, legislative filibusters, and statehood itself (or the lack thereof) are increasingly being questioned, in large part because of the ways they can skew representation and disempower popular majorities (see Levitsky and Ziblatt 2023).

The static notion of democratic consolidation does not readily capture such constitutive and dialectical forms of contestation – that is, the countervailing forces at work in any democratic order that alternately seek to restrict or expand democratic inclusion and contestation and, if necessary, alter their very ground rules (see Yashar 1999). Neither does it capture the contingent character of existing institutional arrangements and the political settlements that undergird them. Scholarship on third-wave transitions and their foundational "pacts" (O'Donnell and Schmitter 1986; Karl 1987), along with more recent research on the authoritarian origins of many democratic regimes (Rield 2014; Albertus and Menaldo 2018), make it abundantly clear that democratic regimes are often constructed around a series of tacit or explicit political compromises that internalize reserve domains of power and privilege – along with their derivative patterns of inequality or exclusion – as the price that is paid to bring recalcitrant actors on board. Recent work on American political development forcefully underscores the point; as Mettler and Lieberman (2020: 192) demonstrate, during times of crisis historically, a "deeply disturbing pattern" emerged whereby "political leaders effectively preserved American democracy by restricting it." Such restrictions – such as federal tolerance of black disenfranchisement and single-party subnational authoritarianism in the post-Reconstruction US South (Mickey 2015), or, in contemporary Chile, a "democratic" constitution bequeathed by a military dictator – often create the fault lines for future iterations of regime contestation, as disadvantaged groups mobilize to challenge institutional constraints on their representation.

Societal pressures to expand or "deepen" democracy are ubiquitous, since no democracy is ever complete, in the sense of achieving full political equality and inclusion. But new democratic breakthroughs to incorporate or empower subordinate constituencies are invariably countered by those who occupy privileged positions in the established order. If, as Stenner (2005) suggests, authoritarianism is rooted in an intolerance of difference – whether that be defined in terms of race, ethnicity, religion, social status, partisanship, or political ideology – a dialectical approach helps to show how efforts to empower previously excluded or subaltern groups can trigger a counter-mobilization of authoritarian currents among guardians of the traditional order. The long-term patterns of social mobilization and counter-mobilization that realigned US politics following the civil rights movement and desegregation in the 1960s offer a paradigmatic example (Parker and Baretto 2013; McAdam and Kloos 2014; Blum 2020). This realignment transformed centripetal competition between two moderate, catch-all parties into a highly polarized regime cleavage between partisan adversaries, one advocating multiracial democracy, and the other dominated by exclusionary ethno-nationalist and religious-nationalist currents with markedly authoritarian tendencies. Some version of the latter currents can be found in virtually every society, whether they are active and visible, or latent and subterranean; a dialectical approach is well suited to identify the political settlements under which they lie

dormant, the social struggles that trigger their activation, and the constitutive conflicts inevitably spawned by their mobilization.

A dialectical approach can also shed light on the process by which many autocratic challenges to democracy assume populist forms, with a binary division of the political field between established elites and a party or leader who claims to embody the popular will of an aggrieved "people." Populist movements may challenge liberal democratic regimes and the professional politicians who control them, but they do so in the name of democracy itself, alternately conceived as an unbridled assertion of popular sovereignty. Populism crystallizes the inherent (though not necessarily irreconcilable) tensions between liberal and majoritarian strands of democratic theory, or between Dahl's (1971: 4–7) two primary axes of polyarchy: a liberal axis of public contestation, reflecting a conception of democracy as a form of institutionalized pluralism, and a majoritarian axis of participation and inclusion, where popular sovereignty lies. Populist challenges typically capitalize on failures or crises of political representation under established democratic rulers, promising "the people" a more just and authentic mode of governance – though not always one that is tolerant of minority political rights, or of institutional checks on the party or leader who claims the people's mandate.

The populist dialectic helps to explain why leaders with autocratic tendencies sometimes obtain significant support in public opinion and sectors of civil society, even when they provoke vigorous resistance on the part of other societal actors. In diverse national settings, autocrats of varied ideological persuasions – from Viktor Orbán to Narendra Modi or Hugo Chávez – have demonstrated not only that they can compete and win in electoral contests, but that they do not have to conceal their autocratic ambitions to do so. Indeed, many have dared to flaunt them, politicizing latent societal prejudices or animosities between different social, cultural, or identity groups, stoking fear and intolerance of out-groups or adversaries, and publicly flouting democratic norms and procedures that restrain their freedom of action or protect their political rivals. When citizens reward rather than punish such behavior in the voting booth, there can be little doubt that politicians are tapping into reservoirs of support for authoritarian alternatives – and, paradoxically, employing democratic instruments to advance them. Such is the endogeneity of democratic backsliding.

Although many activist groups will push back against democratic backsliding, civil society is hardly a homogeneous lot, much less a uniformly liberal one. Successful autocrats do not necessarily concentrate their support among the disorganized or atomized masses; many tap into the group identities forged by organized civic networks around churches, ethnic communities, nationalist or "patriotic" orders, gun clubs, and police or military forces. Civil society, therefore – like state institutions – is an arena where the dialectical interplay between democracy's countervailing forces unfolds. Civil

society networks can be force multipliers that provide mobilizing resources for both democratic and autocratic political projects – that is, for democratic backsliding as well as democratic resilience and "deepening" (see Berman 1997). An understanding of contemporary challenges to democracy requires an examination of this dialectical interplay to explain the social bases – in public opinion, the voting booth, and civil society networks – of both authoritarian and democratic alternatives.

1.3 OUTLINE OF THE VOLUME

The efforts of democratic actors in civil society and diverse institutional arenas to defend or, in many cases, expand democratic practices place a premium on scholarly efforts to theorize democratic resiliency, alongside democratic backsliding. Such theorization should start with an understanding of democracy as perpetually contested terrain – a dialectical frontier, so to speak, rather than a predefined endpoint of political development, a standardized procedural minimum, or a static complex of "consolidated" institutions. The contributions to this volume provide explorations of that frontier across a wide range of national and regional contexts.

The volume is organized into three thematic sections. Part I examines institutional dimensions of democratic backsliding and resilience. Starting with democracies in the Global South, it includes chapters on the erosion of democracy's institutional guardrails in India by Milan Vaishnav, and the sources of democratic institutional fragility in Southeast Asia by Meredith L. Weiss and Allen Hicken. The complex relationship between state capacity and democratic accountability in sub-Saharan Africa is then examined by Jaimie Bleck and Nicolas van de Walle. Shifting attention to institutional challenges in the Global North, Frances Cayton and Bryn Rosenfeld explain how the politicization of the public sector can be a source of autocratic support in Eastern Europe and beyond. David A. Bateman, Robert Lieberman and Aaron Childree conclude the section with an analysis of the political manipulation of electoral administration in the US.

Part II examines democratic struggles in different social spheres, including civil society, social media, and political messaging. Starting with Latin America, Lindsay Mayka analyzes the politicization of crime and gender hierarchies and the narrowing of citizenship rights. Shifting the focus to Eastern Europe, the section includes a chapter by Béla Greskovits on civil society networks and authoritarian political mobilization in Hungary, as well as a chapter by Michael Bernhard on civil societies and democratic "social accountability" in post-Communist Europe. Mark R. Beissinger then explores the institutional conditions and political timing that influence the effectiveness of civil society resistance to backsliding in Eastern Europe. Alexandra Cirone analyzes social media and the corrosive effects of disinformation on democracy. M. Steven Fish concludes the section by exploring the impact of political messaging and

"dominance" strategies on the effectiveness of campaigns against autocratic figures.

Finally, Part III examines regional and international dimensions of the rise of the populist radical right and the challenges it poses to democracy in Europe and beyond. It starts with a chapter by Mabel Berezin on transnationalism, the erosion of citizen security, and the "normalization" of the nationalist right in Europe. Next, Dorothee Bohle and Aida A. Hozić analyze the transnational alliances between mainstream parties and the radical right that have undermined the capacity of European institutions to defend democracy in Eastern Europe. Stefano Palestini and Cristóbal Rovira Kaltwasser then explore the cross-regional political linkages fostered by the *Foro Madrid*, which connects the populist radical right in Spain and Europe to their affiliates in Latin America. Valerie J. Bunce concludes with an agenda-setting essay on the lessons learned and how they should influence our understanding of democracy, its political fragilities, and diverse efforts to defend and sustain it.

Taken together, these chapters shed new light on the nature of the challenges confronted by democracies in contemporary global politics. They dissect the sources and limitations of popular support for democratic and autocratic alternatives, the institutional sites they struggle to control, and the civic spheres over which they contend. Understanding these challenges, we believe, is not only essential for safeguarding existing democracies, but also for reinforcing their capacity to point the way toward better, and more expansive, democratic futures.

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