

# MEASUREMENT OF THE PROCESS OF AUTOCRATIZATION OF MEXICO FROM 2018 TO 2024

## INTRODUCTION

Different authors, such as Luhrman & Lindberg (2019: 1095), are pointing out that the world is experiencing a new wave of autocratization, nevertheless they also argue that ‘gradual declines of democratic regime attributes characterize contemporary autocratization’.

Based on different social, economic, and political databases and datasets, this new wave is accompanied by an increase of social and economic inequalities, as well as by the spread of clientelist and patronage strategies.

Furthermore, Vanessa A. Boese, et. al. (2021: 983) affirm that this wave of autocratization has accelerated in recent times and has had as its two central features polarization and misinformation. They also noticed that polarization increased substantially and significantly in forty countries.<sup>1</sup>

Additionally, Felix Wiebrecht, et. al. (2023: 1) state that by 2022 forty two countries were experiencing processes of autocratization versus fourteen countries experiencing democratization processes, and that only eight countries could reverse their respective processes of autocratization.

They explain how the right combination of factors such as executive constraints, mass mobilization, alternation in power, unified opposition, coalescence with civil society and international democratic support have effectively helped these countries in stopping and even reversing these processes, thus provoking democratic U turns.

In this regard, Boese & Lindberg (2021b) have claimed to have developed a state of the art mapping of democratization and autocratization across the world, through operationalizing a specific conceptualization of episodes of regime transformation in their dataset.

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<sup>1</sup> They even claimed that by 2021 autocracies harbored 70% of world population, that coups increased and that many autocracies became closed.

Apart from this dataset, there are others that have been built to measure directly or indirectly, depending on the case, either the democratization process or the process of autocratization that countries across the world are currently experiencing, for example, the WJP Index, the Freedom House database, the Polity V database, the Electoral Integrity Project Index, among others.

These datasets reveal interesting associations of variables in these processes and disclose patterns of democratic or of autocratic resilience, depending on the case, across the world.

Nevertheless, Skoaning, Svend Erick (2020) have severely critiqued some measures of autocratization, since –according to their point of view- their operationalization of regime change do not capture all possible degrees of change. However, they also argue that the current global wave of autocratization affects a higher number of democracies and unfolds relatively slowly and piecemeal.

In this regard, Maerz, et. al. (2023: 1) have analyzed episodes of regime transformation and claim that these episodes are usually gradual and uncertain, and that only a minority produces a true regime transition. This statement implies that we should understand these episodes as cumulative and that they only cause a regime transition if they achieve a certain degree of regime transformation.

These authors also propose an unified framework for studying regime transformations and they classify four types: liberalization in autocracies, democratic deepening in democracies, autocratization of democracies, and further autocratization of autocracies.

In this sense, Wilson, et. al. (2023: 501) argue that we should avoid fallacious assumptions of unit ‘homogeneity’ of episodes of regime transformation, since each episode is shaped by different contexts and rationales. They pursued to identify ‘the discrete beginning of a period of political liberalization, trace its progression and classify episodes as successful versus different types of failing outcomes’.

For this reason, it is not surprising to find that despite some liberalizing reforms some countries have failed to transition to democracy (Lindberg, 2018: 1). This reality demonstrates that institutional reforms are necessary conditions but not sufficient to achieve a successful transition

to democracy, and that there are some patterns of liberalization that do not lead successfully to democracy.

Thus, our task in research is to try to identify these patterns so that it may be much easier for us to predict more confidently the likely outcomes of specific processes of democratization or of autocratization that some countries may be experiencing.

On the other hand, Wunch and Blanchard (2022) instead of talking about processes of autocratization they prefer to talk about democratic backsliding processes, which ‘diverge in their shape, depth and timing in respect to initial democratic transition’. These authors have even suggested some practical responses to counter these processes, among them, the implementation of democratic safeguards against executive expansion.

By the same token, Benasagliu and Kellam (2023: 815) argue that democratic backsliding has been preceded by a consistent decline of liberal democracy, accompanied by the weakening of institutional checks and opposition parties, and caused by radical ideology.

Conversely, Somer, McCoy & Luke (2021) highlight that a ‘mutually distrustful Us versus Them campus’ has triggered pernicious polarization and processes of autocratization in many countries, since it ‘incentivizes citizens and political actors to endorse non-democratic action’. Furthermore, these authors claim that there is a inverse relationship between political polarization and liberal democracy ratings.

On the other hand, Corani and Graziono (2022: 569) acknowledge that in Europe ‘radicalization’ of populist parties in government could become a serious reality, which could choose this behavioral option among others like ‘‘compromise and moderation’, ‘splintering’ or ‘loss’.

Conversely, Edgell, et. al. (2020: 1) state that clean elections elements –in the capacity of electoral management bodies- are crucial for successful transitions to democracy and that the order in which liberalization unfolds affects the likelihood of a successful democratization as well. In fact, these authors also argue in another paper (2021: 1) that reforms to the administration of elections tend to develop comparatively earlier in episodes of liberalization that produce a democratic transition.

This could have happened in Mexico at the end (the nineties) of the last century: transition to democracy commenced by a constitutional reform to the administration of elections, which created the IFE, and since then electoral processes became more transparent, independent, citizen oriented, objective, fair, impartial, and certain. Also, since then, all these became the guiding principles of electoral processes in Mexico, as well as crucial factors for judging their fairness and validity.

It is possible to seriously argue that thanks to these constitutional and legal reforms that have been approved since 1996, free and fair elections could, for the first time, reasonably take place in Mexico, even if this country has still experienced serious practices of clientelism and patronage from the PRI regime.

On the contrary, President López Obrador (2018-2024) has focused his second half of his term on promoting an electoral reform that could have accelerated the process of autocratization of Mexico, if it had been approved, since it was arguably intended to undermine the principles of electoral integrity in this country: the independence, the citizen management, the objectivity, the impartiality, the certainty and the professionalism of the electoral public body (the INE).

On the other hand, Wright and Bak (2016: 1) highlight the importance of non-tax revenue and unearned foreign income for the stability of autocratic regimes. Their finding makes sense, since as this kind of regimes survive through clientelist and patronage strategies, they need this kind of revenue and this kind of income so that they can practice these electoral strategies at ease and thus be able of manipulating the poor to support the autocratic regime.

By the same token, Morrison (2009: 107) argues that the presence of non – tax revenue increases the stability of an autocratic regime, since it leads to less redistribution (or less burden of taxes for middle classes) and this causes less social disruption, discontent, demonstrations, etc., against the respective regime. This author carried out a cross sectional time-series analysis of at least 80 countries over the period of 1973 – 1999 to prove this argument.

On the other hand, Wright (2021: 1) describes ‘three time varying dimensions of autocracy: party dominance, military rule and personalism’ and explains their impact in the design of strategies of populist parties to remain in power. Similarly, Schmidt & Manfred (2016: 111) measure democracy and autocracy across the world and propose their own regime typology.

Nonetheless Geddes, Wright and Franz (2012) found that democratization is more likely to succeed after non-violent collapses of autocratic regimes than after their violent ousts accomplished via insurgency, popular uprisings or coups. This finding implies that violent revolutions are usually not the *real* or *true* solutions to resilient autocracies, but rather more civic and political engagement in representative institutions and the public sphere of the relative country.

In another paper, these authors (2014) argue that the ousts of dictators do not usually lead to a democratic transition. This finding connects with the argument on the centrality of clean elections and electoral integrity so that autocratic regimes may realistically be replaced by democratically elected leaders and a democratic transition can truly start taking place in an authoritarian country.

Conversely, Acemoglu and Robinson (2006) reflect about the root causes of democracy and autocracy and explain that in any society antagonistic social groups always struggle to implement different kinds of institutions, basically because of the way these institutions allocate power and resources. For this reason, democracy is obviously preferred by the masses, but it usually is strongly opposed by powerful elites.

In this way, the prevalence of democratization or autocratization processes depends on the social group that wins the battle regarding the political institutions that will prevail in the relative country. Somehow this argument resembles what Aristotle wrote more than two thousand years ago, in his book of *Politics*, when discussing the origin and nature of political constitutions: the presence of a particular constitution depends on the combination of the quality and the quantity of the people standing for a particular political arrangement.

Conversely, Tomini, Gibril & Bochev (2023: 119) focus on studying the different strategies of resistance to autocratization across different types of political regimes, while other authors like Merkel and Luhrmann (2021: 869) prefer to study why some democracies are more resilient than others to the current global trend of autocratization.

These authors define democratic resilience as ‘the ability of a democratic system, its institutions, political actors and citizens to prevent or react to external and internal challenges, stresses, and assaults’, and explain that there are three potential reactions to these phenomena: ‘a)

withstand without challenges, b) adapt through internal challenges and c) recover without losing the democratic character of its regime' (Merkel and Luhrman, 2021: 869).

Furthermore, these authors provide insight into the ability of some threatened democratic regimes to effectively halt their respective processes of autocratization, despite the polarization, misinformation, patronage, clientelism, widening of social and economic inequalities and crises, etc., that could be experiencing from autocratic agents, parties and leaders.

On the other hand, as autocratic regimes practice the political maxim 'divide and you shall rule', it should not be surprising to find that the current global wave of autocratization is grounded mainly on polarization and misinformation, whereas productive efforts to halt this wave are based on promoting unity, civic dialogue, tolerance, respect, common ground, understanding among people, civic virtue, etc.,

Nonetheless, Magaloni (2008) highlights the significance of clientelism and patronage in supporting the PRI's autocracy in Mexico, apart from the common strategies of social polarization and media misinformation. For example, this author claims that PRI's autocracy survived for a long time in Mexico because it 'made millions of ordinary citizens vest their interests in the survival of the autocratic regime' and 'because their choices were constrained by a series of strategic dilemmas that compelled them to support the autocrats'.

Both clientelism and patronage imply vote buying strategies as well as control of access to key resources, which eventually and progressively corrupt the original purpose of democracy: free and fair elections. For this reason, democratization processes should start by effectively neutralizing these electoral strategies by reducing substantially their decisiveness in electoral processes.

Based on Magaloni (2008), as long as both strategies remain widely practiced, Mexico will experience an incomplete transition to democracy, since they facilitate the authoritarian manipulation of electoral processes. What is worse is that nowadays Mexico is experiencing the presence and combination of all factors (polarization, misinformation, patronage and clientelism) that encourage autocratization processes and effectively undermine the fairness and the freedom of electoral processes.

Developing this argument and based on the Mexican case, Díaz Cayeros, Estévez & Magaloni (2016), explain that the strategic use of poverty relief programs reflects a politics of redistribution and the development of welfare state institutions aimed at enhancing the ‘popularity’ of an autocratic regime. In this sense, the Mexican case proves that ‘short term’ rational choice of poor people is what supports an autocratic regime in the long term, because if ‘John gives to Peter what Joe earned, Peter will support John against Joe’ (Tracy, 2011).

Nonetheless, as Wright and Bak (2016) affirm, autocratic regimes fund relief programs mainly through ‘non-tax revenue’ and ‘unearned foreign income’, which lead them to build ‘state monopolies’ since they ease their politics of redistribution (clientelism and patronage) to support their popularity.

## RESEARCH PROBLEM

The different contributions cited in the present paper can help us in designing and devising appropriate indicators to accurately measure the current process of autocratization of Mexico, if there has been any significant transformation of its regime in recent times.

Along with the traditional strategies that the PRI regime used last century, such as clientelism, patronage, repression, media control, there are new tactics that the MORENA coalition is using to strengthen authoritarianism in Mexico: a) polarization, b) misinformation, c) organized crime’s violence, d) weakening of institutional checks, e) corruption of opposition party leaders, and f) ideology radicalization.

All these circumstances lead us to frame the following research questions: How gradual the declines of democratic regime attributes in Mexico have been in the present *sexenio* (2018 – 2024)? To what extent has the Mexican society been polarized and misinformed in this period? How can this increasing process of polarization and misinformation in Mexico be adequately measured?

Other relevant research questions that could be derived from the literature review previously described are the following:

Do indicators that measure consistently the presence of executive constraints, mass mobilization, alternation in power, unified opposition, coalescence with civil society and international democratic support standing against the MORENA's authoritarian regime, can help us in measuring appropriately the resistance of the Mexican people to the process of autocratization of their country? Which could be the most significant episodes of regime transformation that Mexico could have experienced in the period of (2018-2024)? Have they been altogether sufficient to cause a real transformation of the Mexican regime?

In terms of the liberalizing electoral reforms enacted in the nineties of the past century it is possible to frame the following research questions: Has the pattern of liberalization that Mexico had followed constrained somehow its current process of autocratization? To what extent has electoral integrity been affected in Mexico in the present *sexenio* (2018-2024)? Can clean elections still take place in this country? What are the most serious threats that Mexico is facing in terms of its electoral integrity?

Are these threats transforming the nature of its political regime? To what extent the collusion of organized crime with authorities has undermined the guiding principles of electoral processes in Mexico?

In terms of clientelism and patronage the following research questions could be relevant for the present paper: How much have poverty relief programs increased their clientelist approach in Mexico? How well is the politics of redistribution working through these poverty relief programs?

How much is non-tax revenue (mainly oil production) and unearned foreign income contributing to the stability of the MORENA's regime? How much have civic and political engagement been affected by the clientelist and patronage strategies of this regime? How much welfare state institutions have been relevant for the resilience of this regime?

In terms of the elites that are pursuing autocracy in Mexico the following research questions could be pertinent: How are powerful are they vis a vis the rest of the Mexican society? How effective have they been in undermining the process of democratization of Mexico that started in the nineties of last century? How resilient has the Mexican electoral democracy been to the autocratization attempts of this elite?



## PURPOSE STATEMENT

The purpose of the present paper is to propose appropriate indicators to measure important dimensions related to the potential process of autocratization of Mexico, once considered the different contributions described in the literature review of the present paper regarding the current global wave of autocratization, and in order to be able of answering the previously significant and outlined research questions, which will help us in arguing the deepness and seriousness of this potential process of autocratization.

## RESEARCH METHODS

In the present section we will discuss the methodological contributions of different international indexes to the adequate measurement of the processes of autocratization and democratization that multiple countries are experiencing nowadays, including Mexico, so that we might be able of finding their strengths to assess accurately the respective process of democratization or of autocratization that any country in the world might be experiencing.

In the first place, we will discuss the methodology of Freedom House. This index

assigned between 0 and 4 points on a series of 25 indicators for an aggregate score of up to 1000. The indicators are grouped into the categories of political rights (0 –40) and civil liberties (0-60) whose totals are weighted equally to determine whether the country of the territory has an overall status of Free, Partly Free or Not Free (FITW\_2021).

On the other hand, ‘Freedom in the World uses a two-tiered system consisting of scores and status’ (FITW\_2023 Methodology). In this sense:

A score of 0 represents the smallest degree of freedom and 4 the greatest degree of freedom. The political rights questions are grouped into three subcategories: Electoral Process, Political Pluralism and Participation, and Functioning of Government. The civil liberties questions are grouped into four subcategories: Freedom of Expression and Belief, Associational and Organizational Rights, Rule of Law, Personal Autonomy and Individual Rights.

Furthermore, this database rests on a historical comparative perspective, since

The scores from the previous edition are used as a benchmark for the current year under review. A score is typically changed only if there has been a real-world development during the year that warrants a decline or improvement, though gradual changes in conditions are occasionally registered in the scores (FITW\_ 2023 Methodology, p. 2).

The main questions in this index used for each subcategory of analysis were the following ones:

#### **A. ELECTORAL PROCESS**

A<sub>1</sub>. Was the current head of government or other chief national authority elected through free and fair elections?

A<sub>2</sub>. Were the current national legislative representatives elected through free and fair elections?

A<sub>3</sub>. Are the electoral laws and framework fair, and are they implemented impartially by the relevant election management bodies?

#### **B. POLITICAL PLURALISM AND PARTICIPATION**

B<sub>1</sub>. Do the people have the right to organize in different political parties or other competitive political groupings of their choice, and is this system free of undue obstacles to the rise and fall of these competing parties or groupings?

B<sub>2</sub>. Is there a realistic opportunity for the opposition to increase its support or gain power through elections?

B<sub>3</sub>. Are the people's political choices free from domination by forces that are external to the political sphere, or by political forces that employ extra political means?

B<sub>4</sub>. Do various segments of the population have full political rights and electoral opportunities?

#### **C. FUNCTIONING OF THE GOVERNMENT.**

C<sub>1</sub>. Do the freely elected head of government and national legislative representatives determine the policies of the government?

C<sub>2</sub>. Are safeguards against official corruption strong and effective?

C<sub>3</sub>. Does the government operate with **openness and transparency**?

#### **ADDITIONAL DISCRETIONARY QUESTION**

Is the government or occupying power deliberately changing the ethnic composition of a country or territory so as to destroy a culture or tip the balance in favor of another group?

#### **D. FREEDOM OF EXPRESSION AND BELIEF.**

D<sub>1</sub>. Are there free and independent media?

D<sub>2</sub>. Are individuals free to express to practice and express their religious faith or nonbelief in public and private?

D<sub>3</sub>. Is there academic freedom, and is the educational system free from extensive political indoctrination?

D<sub>4</sub>. Are individuals free to express their personal views on political or other sensitive topics without fear of surveillance or retribution?

## **E. ASSOCIATIONAL AND ORGANIZATIONAL RIGHTS**

E<sub>1</sub>. Is there freedom of assembly?

E<sub>2</sub>. Is there freedom for non governmental organizations, particularly those that are engaged in human rights -and governance- related work?

E<sub>3</sub>. Is there freedom for trade unions and similar professional or labor organizations?

## **F. RULE OF LAW.**

F<sub>1</sub>. Is there an independent judiciary?

F<sub>2</sub>. Does due process prevail in civil and criminal matters?

F<sub>3</sub>. Is there protection from the illegitimate use of physical force and freedom from war and insurgencies?

F<sub>4</sub>. Do laws, policies and practices guarantee equal treatment of various segments of the population?

## **G. PERSONAL AUTONOMY AND INDIVIDUAL RIGHTS.**

G<sub>1</sub>. Do individuals enjoy freedom of movement, including the ability to change their place of residence, employment, or education?

G<sub>2</sub>. Are individuals able to exercise the right to own property and establish private businesses without undue interference from state and nonstate actors?

G<sub>3</sub>. Do individuals enjoy personal social freedoms, including choice of marriage partner and size of family, protection from domestic violence, and control over appearance?

G<sub>4</sub>. Do individuals enjoy equality of opportunity and freedom from economic exploitation? (FITW\_ 2023 Methodology, pp. 4-16).

Each of these questions were followed by several sub questions that were intended to make the assessment more reliable, objective, realistic, attuned, and accurate. Nonetheless various questions were framed from a hegemonic global liberal cultural perspective endorsed by international organizations, and this could affect the fairness and reliability of its overall judgment.

The first subcategory of analysis – electoral process – measures a core dimension of any process of democratization or of autocratization, though its results are not as thorough as those of the PEI (Perceptions of Electoral Integrity) Project, yet they are quite informative.

The second subcategory of analysis – political pluralism and participation – also measures an important dimension of democratization or of autocratization, and its questions focus on both normative and sociological aspects of pluralism and participation. The B<sub>3</sub> question is especially relevant for measuring this dimension in Mexico, since this country is increasingly experiencing the harassment and ruthlessness of organized crime, which have undermined seriously the political freedoms and rights of Mexicans.

The third subcategory -functioning of the government- is also very relevant to assess the process of democratization or of autocratization of Mexico, since it is true that autocratization is usually accompanied by the previous subjection of the State apparatus to the agenda of ‘interest groups’, which benefit considerably from the undermining of democratic principles in political decision-making processes.

On the other hand, the additional discretionary question is also pertinent to assess the process of autocratization of Mexico, since there has been a substantial and noticeable increase of Central American and Latin American immigration to this country, especially from Venezuela, Cuba, Nicaragua, etc., which could be the premonition of change of the demographic composition of Mexico to favor the viability of the MORENA regime.

In terms of the fourth category of analysis – freedom of expression and belief – it is also applicable to understand the potential process of autocratization of Mexico, since verbal violence has increased from the regime’s supporters against every person that opposes its policies or criticizes its performance, and there has been also an open manipulation of mainstream media’s coverage, which silences or does not even cover news of political opponents, and diffuses or magnifies the narrative of the regime.

At the same time, political persecution has increased against notorious ‘enemies’ of the regime, for example, Ricardo Anaya, former presidential candidate in the 2018 electoral process, who had to leave Mexico to avoid pretrial detention for some corruption charges and accusations made by close people to the current president AMLO.

In terms of the sixth subcategory of analysis – rule of law -, Mexico has been increasingly unable of protecting its people from the illegitimate use of physical force, especially from organized crime, which threatens the lives, integrity and possessions, not only of candidates, but also of common citizens. In this sense, there is no ‘freedom from war’, since organized crime holds, so to speak, an ‘informal’, but ruthless war against anyone who dares to oppose their criminal activities and interests.

In fact, deaths and humanitarian crises are more recurrent and serious in Mexico than in some countries that are living formally a ‘state’ of war.<sup>2</sup>

Regarding the last subcategory of analysis – personal autonomy and individuals – some questions were framed from a hegemonic liberal perspective of freedom, which does not take into account or disregards some moral values of communities constructed throughout their respective histories, thus imposing a particular cultural vision that many times local people do not endorse, thus becoming authoritarian.

(In progress).

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<sup>2</sup> Mexico is one of the most violent countries in the world, surpassing in daily deaths even countries in formal war like Israel or Lebanon, and these numbers are increasing consistently as time passes

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## APPENDICES