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PARTY CHANGE BEYOND THE 'CLASSICAL MODELS?' THE ROLE OF AGENCY, CONTEXT, AND DEMOCRACY

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In recent decades, research on political parties in established democracies has focused primarily on the so-called legitimacy crisis of parties, as reflected in declining voter turnout, growing anti-party sentiment, and other forms of citizen dissatisfaction (Webb 2005; Mair 2013). In their assessment of traditional or mainstream parties, scholars are divided between optimistic and pessimistic views: some emphasise the problems of established parties, especially in Western democracies (e.g. Ignazi 2017), while others focus more on the ability of parties to adapt and survive (e.g. Dalton, Farrell and McAllister 2011). Meanwhile, a strand of literature has emerged that focuses on new cleavages and new parties that are often seen as oppositional or outsiders – including those that become members of a democratic government (McDonnell and Newell 2011). What this last strand of research teaches us is that the relative instability of a party system does not necessarily imply a weakening of established democracy as such, and that party dynamics should not be limited to looking only at the long-established or mainstream parties.

As a result, the research agenda is divided into one strand that seeks to understand both the decline of old parties and their survival, while another focuses on both the emergence and growth of non-mainstream parties. Regardless of the focus, the evolution of political parties remains one of the most important topics in political science. The scholarly attention devoted to party change is limited to established Western democracies, and extends to new democracies and party systems elsewhere. The spread of electoral democracy since the 1990s has greatly expanded the scope of party democracy: while this has confirmed the crucial role of political parties in contemporary democracy, new party systems have proved more diverse and volatile. These dynamics have also led to more contextualised approaches to party transformation by taking into account the variation in sociocultural and political environments as well as the diversity of organisational patterns. The new party systems also entail more complex relationships with democracy, as evidenced by the increasing number of electoral democracies reverting to neo-authoritarian regimes even in Central and Eastern Europe (CEE) (Diamond 2015; Levitsky and Ziblatt 2018). The link between party and democracy does not imply a one-sided relationship. Parties do adapt to the changing characteristics of democratic competition, but parties can also change and sometimes subvert democratic rules and practices.

The aim of this chapter is to provide a critical review of current debates on party transformation and its relationship to democracy. First, we discuss the need for a dynamic understanding

of political parties and how recent developments challenge the classical party models. Then, we focus on the role of the environment in party change. The subsequent section grapples with the trade-off between parsimony and complexity when we try to explain party responses to an increasingly diverse environment. Next, we analyse briefly the relationship between democracy and party change, leading to a discussion on party change in CEE and its implication for party evolution more generally. The final section provides conclusions and suggestions for a future research agenda.

Towards a dynamic understanding of political parties

In recent decades, a vast literature has been devoted to shedding light on the multifaceted transformation of old parties and the emergence of new ones in contemporary democracies. This encompasses developments including the steep erosion of voter loyalty, declining membership, falling voter turnout, increased fragmentation, and weakening legitimacy across democratic systems (see e.g. van Biezen, Mair and Poguntke 2012; Poguntke, Scarrow and Webb 2016). Yet, despite these debates about the decline of political parties, their continued relevance in the electoral arena and in representative institutions is also apparent and undoubtedly linked to their ability to adapt and endure.

In attempting to understand party adaptability, research in comparative politics has largely relied on model-oriented approaches. These have been inspired by or derived directly from the work of well-known party researchers such as Maurice Duverger, Otto Kirchheimer, Richard S. Katz, and Peter Mair. Their respective model-oriented approaches focused on issues of party organisation and its development, ideology and manifestos, voter support, party system change, and the role of parties in government. The core assumption here was that a party's environment both conditions and constrains its ability to adapt. In this context, scholars have identified a set of sequential models linked by evolutionary change with the most relevant being the cadre party, mass party, catch-all party, and cartel party.

The starting point, as emphasised by Duverger (1963), is the cadre party. It was followed by the mass party, characterised by a strong ideology, mass membership, and a clearly identifiable constituency defined by social class, religious affiliation, and/or ethnicity. According to Kirchheimer, the catch-all party represents a transformation of the mass party into a more centralised and flexible organisation that targets a much more heterogeneous constituency in terms of ideology and policy offerings. Within it, the role of the leadership group grew in importance at the expense of the role of ordinary party members. These developments were directly related to the transformation of western democratic societies from industrial to late- and post-industrial economies, leading to the emergence of a large and amorphous middle class (Kirchheimer 1966).

The next stage of party development was the cartel party, best known from the work of Katz and Mair (1995, 2018). In their view, party organisations became less rooted in civil society and increasingly dependent on the state. They argued that 'colluding parties become agents of the state and employ the resources of the state to ensure their own collective survival' (Katz and Mair 1995, 5). As a result, parties can draw on public resources to professionalise their organisations and become less dependent on grassroots membership and activism. One of the correlates of this thesis is that 'challenger' parties, if they want to compete successfully, cannot escape this functional logic and have little choice but to mimic cartelisation if they want to participate in government. In this context, cartel parties tend to converge in their political orientation because they compete in an electoral market conditioned by external pressures emanating from supranational governance and transnational economic integration. The analytical strength of the cartel party thesis is its relatively clear narrative, which provides an overarching explanation for

both the decline of parties (in terms of weaker ties to voters, members, and activists) (van Haute and Gauja 2015) and the adaptation of parties (to the state). It can also explain developments within democratic political systems, including the fact that public subsidies to political parties have gradually increased in all democracies worldwide since the 1960s (Scarrow 2007).

Despite these strengths, the cartel model approach is being challenged from a variety of perspectives. Cross-national research and in-depth individual case studies have shown that cartelisation and attempts by parties to control the state have not necessarily prevented the emergence of new parties and their successful competition. Rather, cartelisation may have even contributed to an increasing polarisation of the party system (Aucante and D  z   2008; Krouwel 2012; Enroth and Hagevi 2018). Moreover, the cartel party model has been questioned from a theoretical perspective because of its underlying 'linear-evolutionary' assumption (e.g. Koole 1996; Kitschelt 2000). Another criticism has been that the model provides a descriptive, step-by-step account of change but does not develop adequate explanations for the mechanism by which parties would change.

Alternative views of party development result from other themes in comparative party research. The first highlights the 'life cycle' of parties, inspired by Michels and his 'iron law of oligarchy' as the 'best known' example of how parties change in the direction of a more centralised and elite-oriented organisation (Harmel 2002, 121). In life cycle approaches, the goal has been to understand the trajectory of parties from their inception to their consolidation. Indeed, this approach has played an important role in tracing the institutionalisation of parties and explaining their ability to integrate into the party system (Bolloyer 2013; Harmel and Svasand 2019). Another view, rooted in the work of Panebianco (1988) and Harmel and Janda (1994), which appears less deterministic, emphasises the ability of parties, including traditional parties, to implement organisational reforms and revise issue positions to avert electoral defeat. Here, the role of leadership, perceptions of party leaders, and dominant intraparty coalitions are seen as 'key intervening variables' that play the critical role in enabling necessary reforms (Gauja 2017). The focus on party formation and the central role of party leadership has allowed researchers to better understand the social origin of parties outside the parliamentary arena as well as the emergence of political entrepreneurs acting as change agents and political architects of parties. In this view, new parties, such as anti-establishment, anti-system, entrepreneurial, movement parties, and digital parties, have increasingly become the focus of research as they tend to build relationships with the state and the media that differ from those of mainstream parties (Schedler 1996; Heinisch and Mazzoleni 2016; Gerbaudo 2019; Zulianello 2019; De Vries and Hobolt 2020).

The nature of party change and its environment

The approaches to party development discussed here serve as a reminder that important disagreements persist in the research community. Scholars studying party development differ on the nature of party change, the choice of dependent variables (model, institutionalisation, reform), and how to integrate environmental challenges into explanatory frameworks.

What is party change? Despite the widespread consensus that parties generally do not just passively endure their fate, scholars disagree over what it means to say that the party itself plays an active role in initiating change. This is not a trivial conceptual problem and was expressed by Peter Mair when he noted that political parties are in a 'state of almost permanent change', which makes the search for an 'essence' or 'identity' of a party virtually impossible (1997, 50). This fact has led to the assertion that the concept of party change may be elusive and therefore irrelevant (Mair 1997, 54). To the extent that we accept that parties actively face challenges,

what does it mean for parties to ‘change’, ‘transform’, ‘adapt’, or ‘evolve’? These terms do not have a uniform meaning, so this semantic uncertainty reflects the diversity of conceptualisations and approaches that characterise the literature.

Mair argues for the need to distinguish change tout court from certain aspects of change and from predetermined criteria against which these aspects can be interpreted (1997, 49). Indeed, parties may change gradually or discretely; such changes may be marginal or may greatly alter a party’s organisation, ideology, constituency, and role in government. But under what conditions does party evolution really go beyond ‘permanent flux’ and manifest itself as party change? Parties may change their system of candidate selection, perhaps moving towards more personalised and candidate-oriented electoral competition (Poguntke and Webb 2005; Cross, Katz and Pruyers 2018; Rahat and Kenig 2018). Or parties may seek to modify the rules of the game, such as the electoral system (Mair, Müller and Plassner 2004). Organisationally, new intraparty dynamics may lead to greater or lesser complexity, changing size, and changing efficiency, or parties may change the distribution of power and representation (Harmel 2002, 138). Nevertheless, the nature of party change remains theoretically unclear, since there is almost always some kind of change taking place within parties, as in any organisation. It can be particularly difficult to determine the conditions under which particular changes such as a change of leadership become significant or decisive in shaping a party’s development or in affecting its chances of survival.

There is a broad consensus that, in long-established parties, change typically follows electoral decline. However, there are some situations in which party leaders have tried to anticipate the crisis and avoid it by acting in time (Mair, Müller and Plassner 2004). Moreover, it is not always clear how and why environmental changes influence party change. Scholars generally agree that social, economic, and technological transformations pose crucial challenges to party competition with existential consequences for individual parties. So far, the literature has mainly identified exogenous factors as being strongly linked with parties entering a crisis. These include the loss of authority of traditional institutions and secularisation (Norris and Inglehart 2019), the disappearance of traditional class-based milieus, the erosion of socialist and communist ideologies after the fall of the Berlin Wall, and, crucially, the impact of globalisation and European integration, which challenge the monopoly of the nation-state in policy-making but also patterns of party competition (Hooghe and Marks 2018). However, the difficulty in accounting for such diverse economic, social, and cultural transformations, as well as the increasing role of the state in party mobilisation (Mendilow and Phélippeau 2018), within a shared theoretical conceptualisation, seems to limit systematic assessments.

Explaining party change: between parsimony and complexity

The recent literature on party evolution reflects a growing tension between analytical parsimony and complexity. Scholars are hardly able to account for the complexity of political parties and the myriad facets evident in their development. This highlights also the empirical difficulty of observing internal party dynamics ‘for real’ and not just ‘on paper’ (Borz and Janda 2020, 6). There also seems to be a growing awareness of the risks inherent in parsimonious and thus simplistic models. Thus, newer research on parties is driven less by formal and more by hybrid theories of change that largely turn away from the classical party models. This newer literature appears sceptical not only about the capacity of traditional scholarship to adequately account for party change empirically but also about the heuristic strength and thus validity of parsimonious theoretical frameworks. Accordingly, research that tries to understand specific cases of party change using models operating at a considerable level of abstraction must necessarily neglect

important empirical observations. For some, these omissions render an analysis at best dissatisfying and at worst invalid. By contrast, the alternative approach to party research relies heavily on case studies, a method often neglected by scholarship for the difficulty in generalising findings to an entire class of phenomena. Yet, according to Bale (2012, 4), this alternative mode of inquiry also yields important empirical benefits, such as the opportunity to focus simultaneously on long time horizons and large sets of indicators related to change and its causes. Moreover, this approach is more attentive to factors that are novel or inconsistent with the classical models of party change and would normally be excluded from analysis, including 'anticipated reactions, unfinished business, non-electoral shocks, path-dependency, spillover, and long-term secular social change' (Bale 2012, 316).

As the usefulness of abstract heuristic party models for understanding contemporary party change has come under scrutiny, scholars are also reassessing the validity of such frameworks when applied to parties historically. In a new appraisal of the 'golden age' of mass parties in Western Europe in 1950s and 1960s, Scarrow (2015) shows that only a few parties corresponded to the mass party model with the committed and broad grassroots organisation that Duverger and Kirchheimer had extolled in their classic works. The need for scholarship to become more sensitive to spatial and temporal variation and more cautious when applying model-based approaches was underscored by research conducted by Webb, Pogunkte and Scarrow (2017). In their comparative analysis of 17 democratic systems in Europe, Israel, and Australia, they stress the need to pay 'more attention' to the 'appropriateness and limits' (2017, 315) of approaches based upon party models and caution us that the 'multifaceted universe of political parties in the twenty-first century' does not correspond to these models (2017, 319).

Generally speaking, the major studies of party change in a cross-national and diachronic perspective, containing country cases from the Middle East, South America, Southern Europe, and Western Europe, have shown not just several common trends but also relevant differences both between the democratic systems per se and between parties within individual countries (Dalton and Wattenberg 2000). Rahat and Kenig provide evidence of a decline in partisanship across 12 indicators and show that there is a considerable variation:

[P]arty adaptation is characteristic of some countries, while party decline is characteristic of others. A more complex formulation of this thesis might be that we see a continuum of more or less successful cases of adaptation and sharp declines at the extreme ends if parties either fail to adapt at all or react excessively.

(2018, 91)

Furthermore, it is worth noting that Rahat and Kenig (2018) are less interested in party evolution than the ability of parties to respond to critical situations. In doing so, they shift our view of party dynamics from an evolutionary and teleological perspective to a multi-layered and pluralistic understanding. This clearly highlights the limit of a rationale based on overarching and subsequent party models.

Which kind of democracy?

Attempts to move beyond evolutionary approaches to party change have also emerged from studies on the relationship between parties and democracy. The literature on party evolution implies a fundamental tension about the conception of democracy that political parties should address. In the classical tradition of comparative party politics, democracy is conceptualised as a matter of competition between parties, ideally 'led by responsible teams of leaders who

ultimately converge on a single national will or interest from the center' (Katz and Mair 2018, 171). However, the relationship of parties to democracy concerns not only their external connection to the political system but also their internal functioning and organisation, which grants varying degrees of democratic agency to the grassroots membership. Parties are a means by which socially heterogeneous people enter into political engagement and are socialised into democratic behaviour; yet party organisation seems to follow Michel's 'iron law of oligarchy', which runs counter to the participatory principle of democracy. In recent decades, as the 'crisis' of parties became more salient, the principle of popular participation and its particular perspective on democracy has driven new research on party development, focusing in particular on intra-party democracy (Cross and Katz 2013; Gauja 2017; Borz and Janda 2020).

Incidentally, internal party democracy and new forms of participation are also seen as an alternative way for parties to survive, which differs from the strategy of relying on state subsidies (Ignazi 2020). Meanwhile, the question of the stability of democratic regimes and the role that political parties play in them are gaining relevance. Between the 1970s and 1990s, the shift to electoral democracy that characterised an increasing number of regimes worldwide changed how the relationship between political parties and democracy was viewed. This historical shift challenged the traditional division between the study of parties in established democracies and elsewhere. As electoral democracies proliferated, new democracies appeared to converge with established ones. More recently, however, the evolution of several new democracies has taken a turn towards authoritarianism, and some of the explanations for the deconsolidation of electoral democracy have pointed to the role of political parties. Because they have the ability to either change or subvert democratic rules, this trend is not limited to certain regions. Some parties promote representative democracy, its rules, and its practices, while in others they seem to play an opposite role, creating space for corruption and authoritarian tendencies (Lawson 2007).

Beyond established democracies: Central and Eastern Europe

The evolution of party systems in CEE provides new benchmarks for established theoretical perspectives that mainly emerged in Western democracies. For a long time, party systems in CEE were expected to emulate the relatively stable, highly differentiated, and institutionalised party systems in Western Europe. Recent developments, however, seem to contradict this assumption (Lane and Ersson 2007; Enyedi and Bétoa 2018).

Although CEE shares significant historical, political, and sociocultural similarities with Western Europe, it also has crucial differences that are theoretically and empirically important for understanding party dynamics in general. Shaped by the transition from communism to post-communism (Kitschelt et al. 1999, Evans 2006), the initial parties that emerged did not conform to Kirchheimer's (1966) notion of an organisation with close ties to a mass electorate. The first elections resembled plebiscites in which the newly formed parties had to navigate valence issues. In response, parties effectively 'diluted their original ideologies in order to widen their voter base' (Sikk 2018, 106). Some parties became what Innes (2002, 88) called 'instant catch-all parties' and appeared to lack a natural constituency (Schöpflin 1993; van Biezen 2005).

This failure was politically costly once the deep organisational roots of the former communists enabled them to come back politically by exploiting voter disillusionment with the reform process (Webb and White 2007, 7). In response, the major right-wing parties competed by either pushing for more market liberalism or focusing on sociocultural issues (Buštková and Kitschelt 2009; Pirro 2015). While left-wing parties became eastern versions of liberal social democrats, the mainstream right moved further to the right, advocating illiberal and Eurosceptic positions (Riishøj 2004; Minkenberg 2017). In contrast, leftist parties, especially in Russia

and the Balkans, pursued a 'national-patriotic' strategy which replaced Marxist-Leninist doctrine with an appeal to nationalist and nativist sentiments, with the aim of building a broader coalition (Bozoki and Ishiyama 2002, 4–6).

Where the mainstream right did not adapt successfully (Henderson 2008, 121–122), they were outmanoeuvred by political entrepreneurs, often touting their business credentials or communication skills, an example of which is the surge of the Czech party ANO2011 (Tomšič and Prijon 2013). A high level of personalisation and leadership concentration are significant features of these parties in CEE (Gherghina, Miscoiu and Sorina 2021) which ensures the prominent position of party leaders and their networks but weakens party institutionalisation. This makes parties 'disconcertingly fluid' and contributes to 'porous boundaries between the radical right and the mainstream right' (Minkenberg 2015, 34). The resulting greater ideological extremism and higher electoral volatility compared to Western Europe undermine established parties in CEE and favour new ones (Savage 2016), which are often formed just before elections (Sikk 2018, 106). These new parties quickly disappear if they do not develop viable survival strategies such as mastering the strategic use of propaganda and discursive frames (Minkenberg 2017; Pytlas 2018). Over time, successful new parties also develop organisational links with their supporters and collude to exclude new parties from coalition formation (Savage 2016). Another important strategy is engineering a 'symbiosis with the state' (Sikk 2018, 106), since all countries in the region have introduced public funding for political parties (Kopecký 2006).

Yet other strategies involve forms of state capture of which Hungary (Fazekas and Tóth 2016), Poland (Kozarzewski and Bałtowski 2016), and to a lesser extent Serbia (Bochsler and Juon 2020) are the best-known cases. There, the leader coordinates vast patronal and partisan networks that exert control over the judiciary, national financial institutions, the national media, and education institutions. Shaped by the context of transition and post-transition, fluid social structures, and the weakness of civil society, the organisational characteristics of parties in CEE spring from their development paths (Evans 2006, 258).

Conclusions and avenues for further research

Comparative party research focusing on established democracies, particularly in Western Europe, has provided a large body of theoretical insights and empirical evidence on both the decline and survival of mainstream parties. While there is broad consensus that parties are not passive organisations at the mercy of global transformations, government subsidies, declining traditional membership, and new media logics, research suggests that the adaptability of parties and the manner of active change varies widely. Since the 2000s, scholars have become increasingly aware of the need to think about party dynamics beyond a linear evolutionary approach, which means considering the relevance of the sociocultural, political, and institutional context and the crucial role of strategies in party transformation. If a traditional or mainstream party endures despite the decline of its constituency, it is because it adapts and avoids a predetermined path. Thus, such a party might implement intraparty democratic reforms or strengthen its leadership. On the whole, party dynamics in established democracies converge less than expected on any particular party model, such as the cartel party.

Although ideal types remain important from an analytical perspective and serve a heuristic purpose, this does not mean that all parties are expected to converge in a single type of party organisation. The ascendance of new parties in established democracies arguably challenges the idea of convergent trajectories as well. Short-lived or permanent, new parties may vary in the extent to which they are shaped by the dominant ideological or organisational characteristics of their party system. Instead, they may follow original paths, taking advantage of new

environmental opportunities (such as digital parties) and become more or less influential in the face of new or old competitors. The availability of data from large cross-country studies and the opportunity to empirically test theoretical assumptions about individual parties in different contexts represent not only an advance in our knowledge but also a challenge to the evolutionary perspective, giving room for a pluralistic view of the paths that parties take.

The growing awareness of the multiplicity of party transformation is also a consequence of the spread of electoral democracy to other parts of the world, prompting researchers to address the role of party change in connection with new democracies. Until relatively recently, the literature on party transformation focused almost exclusively on the major Western European democracies, where there was a strong legacy of the mass party. While interest in established democracies continues, there is growing attention on new democracies, especially in CEE, which is driven by questions of how and to what extent conceptualisations developed in Western Europe also apply to new party systems. Party change is also receiving attention outside Europe, which provides us with an even broader comparative perspective and a richer source of empirical data.

Focusing on party dynamics beyond established Western democracies also allows for new questions to be asked regarding the interconnection of democratic regimes. Political parties are a necessary instrument of democracy and there is no evident practical alternative. Yet parties do not necessarily have to work with, or for these democratic rules, neither do they have to change in accordance with them. Taking into account the diversity of settings and legacies around the world, the relationship between party organisations and democracy needs to be considered a two-way process. Sometimes a party adapts to external pressures by pursuing intraparty democratisation and responds with increasing openness towards members. In other cases, a party survives by reducing party competition and curtailing democratic rules both in its internal organisation and in the party system as a whole. Political parties are a strong link to democracy, but they also face particular opportunities and constraints as they compete for power which may also make them a factor in democratic deconsolidation.

While scholars are more aware of the complexity of party organisations and their relationship to democracy, internal dynamics continue to pose the greatest empirical challenge to researchers. One of the most commonly recognised problems is in assessing the trade-off between established party organisations' 'natural inclination' against discrete change (Harmel 2002, 119) and emerging positions in favour of change. Similarly, the tension between intraparty grassroots participation and decision-making by the party leadership remains understudied. Despite widespread scepticism of Michels' iron law of oligarchy, the empirical evidence is not sufficiently strong that we might refute or even ignore his thesis.

The issue of party change poses methodological problems regarding access to party data. In many ways, intraparty dynamics represent a 'secret garden of politics' (Gallagher and Marsh 1987). While programmatic and ideological changes enacted by parties along with their effect on the party system and government are well documented and thus easier to study, the interactions among members, activists, staff, leaders, candidates, MPs, and government officials are difficult to investigate, as we still lack robust data on these relationships. Cross-national datasets represent a great advance in our understanding of party behaviour and organisation. Examples of quantitative data, such as those contained in the Political Party Database Project (Poguntke, Scharrow and Webb 2016), as well as qualitative historically oriented and ethnographic sources (Faucher-King 2005; Bale 2012; Weikert 2019), are important complements to gaining a deeper and more dynamic understanding of intraparty relations. Similarly, qualitative methodological approaches are well suited to measuring intraparty perceptions and gaining insights into the behaviour of individuals and groups.

Finally, we must come to terms with the realisation that not only intraparty relations but also the relationship between voters and parties is still something of a black box (Werner 2020). What forms of representation do voters want? Do they want to be constantly involved or left alone by parties? Do they prefer that campaign promises are fulfilled in principle even if fulfilling promises brings about unpopular policies (Thomson et al. 2017)? Do voters value responsiveness over accountability or are they more likely to favour a balance (Bardi, Bartolini and Trechsel 2014)? While all of these questions have yet to be empirically resolved, they send cues that influence party behaviour, which in turn affects voter behaviour and party competition. This calls for a perspective on party change that is dynamic, conceptually open to new possibilities, and attentive to both environment and agency.

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