Democracy in the Global South: Historical elements and contemporary challenges

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Abstract

This investigation aims to analyze democracy in the Global South, in its historical elements and contemporary challenges. The research contributes to a cosmopolitan vision of democracy. It is affirmed that even in a context of poverty and high ethnolinguistic diversity like in India, Indonesia, and Botswana, democracy can be achieved. The political economy hypothesis on oil income is advanced with the analysis from the Arab countries. Categories are offered to analyze the contemporary authoritarianism of Turkey and Venezuela. Moreover, the analysis of populism is deepened with the contemporary cases of India and Brazil.

Keywords: Global South; History of democracy; Theory of democracy; Democratization; Political analysis.

Democracia en el Sur Global: Elementos históricos y retos contemporáneos

Resumen

El objetivo de esta investigación es analizar la democracia en el Sur Global, en sus elementos históricos y retos contemporáneos. La investigación contribuye a una visión cosmopolita de la democracia, se afirma que incluso en contexto de pobreza y alta diversidad etnolingüística como en India, Indonesia y Botsuana se puede alcanzar la democracia, se refinan la hipótesis de economía política sobre la renta petrolera con el análisis de los países árabes, se ofrecen categorías para analizar los autoritarismos contemporáneos de Turquía y Venezuela, y se profundiza en el análisis del populismo con los casos contemporáneos de India y Brasil.

Palabras clave: Sur Global; Historia de la democracia; Teoría de la democracia; Democratización; Análisis político.

1. Introduction

In recent years, reflection on the Global South has had a special interest, due to its economic dynamism, in terms of growth, trade, and investment. Its historical and contemporary importance in international relations has also been highlighted. However, other elements have not been the object of similar interest, such as democracy in the Global South. Democracy in contemporaneity has become a universal value. The democratization process in recent decades has no parallel in history due to its geographical scope. In countries where undemocratic governments persist, more and more citizens demand greater freedoms and the language of democracy is more recurrent. However, it has been the norm to study democracy as a historical phenomenon of the North Atlantic, and its ethical values as the monopoly of the *West*.

Therefore, the objective of this research is to analyze democracy in the Global South, in its historical elements and contemporary challenges. As it is a very broad effort in space and time, the study will be limited to cases that are of special importance for the narrative of democracy in the Global South, and for the democracy theory in general.

The article is presented in two parts, on *historical elements of democracy in the Global South* seeks to recognize the historical contributions of the Global South to democracy, arguing in favor of a global legacy of democracy. And in the second part, *contemporary challenges of democracy in the Global South*, analyze the phenomena of authoritarianism, populism, and the logic of political economy in the political systems of the Global South; and advanced some hypotheses commonly used in the analysis of democracy and democratization.

2. Historical elements of democracy in the Global South

From the Global South, Miranda (2017) has defined democracy as the political regime that, through public reasoning and government institutions elected and regulated by citizen control and laws, seeks freedom and justice.

Since this definition, follows that the essential element of democracy is the public reasoning or deliberative dimension of democracy, represented in the exercise of assemblies. The governmental institutions elected and regulated by citizen control and laws are contemporary historical elements of democracy, while public reasoning is found in the origins as the first expression of democracy.

The first expressions of democracy are found in what is now called the Global South. As Keane (2018, p.25) points out, based on contemporary archaeological discoveries, the practice of self-governing assemblies occurred for the first time around the year 2500 BC, in the current territories of the Levant, specifically in the actual Syria, Iraq, and Iran. Then, after 1500 BC, in the early Vedic period of the Indian subcontinent, republics ruled by assemblies became common. Eventually, self-governing assemblies reached Phoenician cities such as Byblos and Sidon, and later, in the 5th century BC, they reached Athens. At times, these assembly exercises were combined with the freedom to speak in public, voting machines, vote by lottery, and written constitutions (Keane, 2018, p.29).

For example, in the Phoenician city of Byblos, present-day Jubail of Lebanon, forms of self-government existed 500 years earlier than in Athens. The Phoenician peoples lived in present-day Palestine, Syria, and Lebanon around 1100 BC. also promoted assemblies (*ukkin* in Sumerian and *pŭhrum* in Akkadian) that limited the power of the monarchs. The assemblies were more genuinely *popular* than those of Athens and were not exclusively an urban phenomenon, but also of the countryside and the villages, where popular meetings of a legislative nature were held. There is archaeological evidence that indicates that, for example, in the city of Mari, on the current border of Iraq and Syria, the entire population participated and voted in an assembly or that in northwestern Mesopotamia nomadic shepherds met regularly to discuss matters of common interest (Keane, 2018).

The political community of Islam also made important contributions and innovations to these early expressions of democracy. The institutions of the *jamaa'imadani* can be considered as the first expressions of a *Civil Society*, which developed private and civil laws and had as their main meeting point the *masdjid* (Mosque), a public meeting space for the entire community. Community to deliberate, make political statements, conducts government business, host ambassadors, and conduct business. In the early political community of Islam, the functions of governors were limited to ensuring the observance of laws and respecting their autonomy, laws had legitimacy only if they were discussed openly in public beforehand (the so-called *mashwara*), a custom that is even from pre-Islamic Arabic (Keane, 2018).

From the original elements of democracy can be observed that the Global South has been the protagonist. The assemblies were constituted as a political tradition of more than two millennia. Therefore, the story of democracy as the history of Europe and then of the North Atlantic is not credible. In addition to the difficulty of understanding classical Athens as

European, which had greater intellectual and commercial influence with the present territories of Western Asia, Egypt or India, more than, for example, with current England, Germany, or France. Finally, one cannot accept the postulates that indicate that there are cultures or religions intrinsically incompatible with democracy. As shown by the originality and historical contributions of the Islamic community to democracy, despite its contemporary difficulties.

This form of democracy came to an end with the invasion of the Macedonian Empire to Athens, which achieved total control in 260 BC. Democracy had to wait for its second historical phase, which has been called since XVIII century as a representative democracy. But it is from the XIX century when democracy expands more rapidly.

Empirically, Huntington (1994) in his explanation of the democratization and breakdowns of contemporary democracies worldwide identifies three waves and two counter waves of democracy. For the author, the first wave covers the period from 1828 to 1926 and has its roots with the American and French revolutions, and the counter wave begins with the march on Rome and Mussolini's victory over Italian democracy, and with the conquest of the Hitler's power in Germany in 1933. In this first wave, he identifies four Latin American countries, the three from the Southern Cone, Chile, Argentina and Uruguay, and Colombia from the Andes. Thus, it should also be noted that countries of the Global South were also protagonists in this new moment of democracy.

The case of Uruguay is of special interest since it is considered to be the highest quality democracy in the Global South. Understanding by the quality of democracy the degree that a political system complies with the four dimensions that define democracy, public reasoning, government institutions elected and regulated by citizen control, laws, and the search for freedom and justice.

Much of Uruguayan republican history has been democratic, and its institutions, participation in public power, modes of government, the exercise of public authority, and the political culture are among the most democratic and rooted in the Global South. These qualities are especially due to the partisan competition that a competitive and plural political party system achieved. The Colorado Party and the National Party (mostly known as the White Party) emerged in the 1830s, and their stories of Civil War and confrontations made up one of the longest-lived and most stable bipartisanships in the world. Each confrontation between *colorados* and *blancos* led to agreements to consolidate institutional mechanisms,

competition codes, and principles of power-sharing. This not only influenced the political party system, but also the political architecture of the State, in the character of civil society and its identity constructions. The parties were configured as catches-all, national in scope and multi-class articulation, with a wide spectrum of social appeal and a high degree of integration among its members, which has generated significant political identities and subcultures. The Colorado Party has held power since 1865 to 1958, including the two presidential terms of José Batlle y Ordóñez, who was the most important political figure of the period (Lanzarote, 2004; Dutrénit, 1996; Miranda, 2019a).

During the administrations of José Batlle y Ordóñez (1903 - 1907 and 1911 - 1915), political activity entered an important progression of modernization and society in a significant process of democratization. The riven between *colorados* and *blancos* went from armed confrontation to debate ideological. The national state was consolidated. The creation of government agencies and public companies was promoted. A fairly advanced social legislation was introduced for the region at the time, which especially favored women, children, and workers. Thus the State was born as a comprehensive State in public services, as a welfare state, and a solid link was built between political citizenship and social citizenship (Lanzarote, 2004; Dutrénit, 1996; Miranda, 2020a; Miranda, 2019a).

It can be observed how, with the Batlley Ordóñez administrations, democracy developed not only in a narrow formal space but also managed to be effective and expand to the economic and social sphere, granting a distinction of quality and legitimacy that has lasted until our days. Social conflicts were resolved and institutionalized within the State, and from the State, the political and socioeconomic changes that gave foundation to democracies were promoted.

However, like all the countries of the Southern Cone, Uruguay suffered a coup in 1973 and the establishment of a dictatorship, which included systematic violations of human rights and forced disappearances. Uruguay returned to democracy in November 1980 when the authoritarian regime sought to legitimize itself through a constitutional plebiscite but lost it. After the authoritarian period, democracy continued with its moderate and centripetal logic, and with the presidential alternation between *colorados* and *blancos*. Additionally, democracy was strengthened thanks to a broadening of the supply of the party political spectrum, because of the emergence of the *Frente Amplio* (Broad Front).

The *Frente Amplio* was born in 1971 as a coalition of parties that gradually became a party of coalitions. Its emergency context can be traced back to 1958 when the breakdown of the *Batllista* coalition demanded the establishment of an alternative state and government model, leading to the 1966 Constitutional Reform that modified some of the original bases of the political system. The *Frente Amplio* was born as a party of ideas that covers a wide spectrum of the plural left and a considerable internal democracy. The period of the dictatorship relegated the parties from political life but with the restoration of democracy, the *Frente Amplio* confirmed its presence as a relevant actor in the party system. Thanks to its role in the recovery of democracy resized its proposal and was incorporated as an equal in the national narrative. The *Frente Amplio* re-politicized the programmatic agenda of public policies, has covered the spectrum of the democratic left that missing the Colorado party. It has strengthened civil society like evidenced by the historical ties that maintained since the 1960s with the PIT-CNT, the only trade union center in the country (Lanzarote, 2010; Lanzaro, 1998; Moreira, 2006; Dutrénit, 1996; Miranda, 2019a).

The *Frente Amplio* governments, which included two administrations of Tabaré Vázquez (2005 - 2010 and 2015 - 2020) and one of José Mujica (2010 - 2015), can be considered as the most social-democratic in the history of the Global South. It has managed to combine the market economy with the most developed welfare state in Latin America. During all administrations of the *Frente Amplio*, the economy has shown stable growth above the average of neighboring countries and the historical average of the country, real wages have grown thanks to the strengthening of collective bargaining. Policies have been extended to favoring people in a state of poverty with a rights approach, through bureaucratic channels and specific institutional arrangements such as the Ministry of Social Development and the Social Security Bank. All this in a context of a balance of powers, negotiation and commitments. This allows administrative political oversight and gradualism, achieving the reduction of poverty and indigence to historical lows and a moderate decrease in inequality (Miranda, 2018a; Bogliaccini and Queirolo, 2017; Solano and Miranda, 2019).

It should also be noted, as a democratic experience, that Latin America is the only region of the Global South that has had long periods, from the 1990s to the present, where almost all of its countries have been democratic. And later the democratization of Mexico with the alternation in the presidency and the defeat of the Institutional Revolutionary Party (PRI) in 2000, until the breakdown of democracy in Venezuela with the

administration of Hugo Chávez, all countries were democratic. Additionally, together with Saxon America, they make up the Organization of American States (OAS), which is the only intergovernmental body that has the promotion and defense of democracy as a priority and from the time when its foundation has incorporated democracy as a normative element.

In the so-called second wave of democracy, one of the most democratization interesting cases occurred in the Global South, India. India is one of the most populous countries in the world, with high rates of illiteracy, poverty, and widespread malnutrition, one of the most diverse in the world in ethnic, religious, and cultural matters in general, with thirty-five languages spoken by more than one million people, and with high levels of religious and community violence.

However, despite the indications of the analysis of democratization that warned the impossibility of achieving democracy in a country with these conditions; India achieved an unusual decolonial transition with democratization, creating a three-tier system of government driven by local self-governments, a strong written constitution, and an explicit division of powers between the states and the central government.

The country's first general elections, which began in October 1951 and ended six months later brought together 176 million people, 85 percent of them illiterate, and 75 political parties. The Congress Party was victorious in 18 of the 25 states. The Congress Party successfully evolved from an umbrella organization of the resistance movement in the struggle for independence, to a ruling party at the center of Indian political life (Kothari, 1970).

The leadership of Nehru, who was Prime Minister for three terms, was instrumental in founding Indian democracy. He decides for the sharing of power and political openness, and secularism different from the traditional division between the government and the religious, but consisted of a set of governmental devices to grant public dignity to believers, to protect and promote their religious freedoms. He strengthened the rule of law and the country's proto-federalism, encouraged parliamentary debate, promoted freedom of the press, achieved civilian control over the military, maintained the internal democracy of the Congress Party, and preserved the non-politicized civil service. After his death on May 27, 1964, the Indian political system was characterized by disputes between leaders and by instability (Kothari, 1970; Ganguly, 2002).

Nehru and the Congress Party were concerned not only with formal democracy but with a democracy of social equality and national unity.

Nehru declared himself a socialist, understanding by this the empowerment of people in a poverty situation through state planning of industries, which included the so-called reservation system, which consisted of a new set of rules aimed at guaranteeing job quotas and opportunities for Registered Castes and Registered Tribes (Kothari, 1970).

Civil society also deserves to be highlighted, as it has been especially active since the 1980s. Civil society goals were varied, highlighting ethnic issues in Punjab and Assam, tribal identity in Jharkhand and Chhatisgarh, fighting for public recognition of the so-called backward classes in Gujarat, Uttar Pradesh, and Bihar, and peasant movements and agricultural laborers in Telengana and Naxalbari. Especially significant was the participation of women, including Dalits (*untouchables*) and castes officially called Other Backward Classes (OBC). All this allowed for the deepening of democracy, expressed, for example, in the 1993 agreement when local autonomous governments were introduced in the 600,000 towns and villages, bringing deliberation and decision-making closer to all citizens. They also built a set of mechanisms such as participatory budgets, *lokadalats*, and consultation programs on water (Keane, 2018).

Contemporaneous with the democratization of India, Costa Rica is the second oldest interrupted democracy in the Global South. Its analysis is especially interesting because it is one of the highest quality democracies in the Global South.

Since 1953 Costa Rica has held free and competitive elections, taking place in the context of the abolition of the army since 1948, which has avoided the recurrent militarism that has characterized the contemporary Global South. With centripetal bipartisanship shaped by the National Liberation Party (NLP), it won the first democratic elections supported by the middle class. In its early years applied an agenda with a social-democratic profile that allowed it to accompany democracy with greater socio-economic freedoms. The other party was called since 1983 Christian Social Unity Party (CSUP), made up of a continuum of center-right opposition parties. These two political parties succeeded to consolidate important identities and ties with different organized social sectors, allowed them to control around 90 percent of the votes for the executive and the legislature. And promote a democratic culture, where the government was not only important in the political sphere in the strict sense, but also contributed to socio-economic democracy. Costa Rican democracy managed to survive adverse geopolitical situations, such as the civil wars in Central America (Torres, 2015; Miranda, 2018b; Miranda, 2017).

Costa Rica, like Uruguay, managed to develop extensive social states. Even before the democratic period, under the administrations of Rafael Calderón Guardia and José Figueres Ferrer, a universal social security system was created. Public and quality education was guaranteed, the Labor Code was promulgated, the constitutional chapter of guarantees social was consolidated, banking was nationalized, and rural credit was expanded. This political economy dynamic has allowed Costa Rica to stand out for its state organizational capacity, the autonomy and decentralization of its agencies, and the bureaucratic institution's effectiveness (García and Miranda, 2020, Hangartner and Miranda, 2019; Miranda, 2019b).

Since 2002, even though Costa Rica was the country that made the highest per capita investment in the region, income inequality increased significantly, in a context of political unrest and electoral abstention, a shift of the NLP to the right, reducing the spectrum of political supply, and the personalization of politics. However, the political system has proven to be resilient, and a third party has emerged, the *Partido Acción Ciudadana* (Citizen Action Party), which has covered the social-democratic offer that has characterized the democratic culture of Costa Rican civil society, which has allowed it to obtain the Presidency in the last two elections, in 2014 with Luis Guillermo Solís and 2018 with Carlos Alvarado Quesada (Miranda, 2018a).

Finally, the case of democracy in Botswana must be highlighted. The democratization of Botswana happened in a background where virtually all African countries became authoritarian immediately after their independence or shortly thereafter. At the formal end of the French, Belgian, English, and Portuguese empires, the world superpowers in the context of the Cold War promoted and maintained authoritarian governments aligned with their particular interests.

Botswana achieved independence in 1966, being one of the poorest countries and with a difficult political situation. The population barely reached half a million people, and it was predominantly rural and illiterate. Physical and institutional infrastructure was scarce even by the standards of the time in Africa, due to the lack of care given during the time of colonization by Britain. Politically, there was no bureaucracy, no army, and the middle class was very weak, and all its neighboring countries were hostile to the notion of independence and controlled by minorities.

Nevertheless, Botswana achieved its democratization after independence. The Botswana Democratic Party (BDP) achieved significant autonomy and stability, due to the absence of opposition and general apathy

on the part of the citizenry, in addition to the internal cohesion of the party. The bourgeoisie, which was an essential element in the construction of democracy, became confused with the party structure and was built through state-led development policies. Economic growth, driven by the exploitation of diamonds, granted the material resources so that the State could modernize the public administration. Thus, the traditional institutions were replaced by the new organs, parliament, territorial boards, and district councils, which depended on State recognition. It also invested in communication systems, health infrastructure, and education (Good and Taylor, 2008).

However, must be noted that the political economy of state-building and the exploitation of diamonds limited the quality of democracy. Currently, Botswana has resulted in electoral authoritarianism. Electoral exercises are maintained but in a context of disrespect for political and civil rights.

All these studies case demand a broader, truly plural historical reconstruction of democracy, restoring the contributions and experiences made by the Global South. Such as the assembly democracies of the Levant territories, the formation of civil society in the early Islamic political community, the regional commitment to democratic values in contemporary Latin America, and high-quality democracies like Uruguay. It also forces us to rethink the so-called preconditions; those success stories of democratization in unfavorable contexts such as the cases of India and Botswana indicate that there is no single model or sequence of democratization.

3. Contemporary challenges of democracy in the Global South

One of the main challenges for democracy in the global South and at the global level is the democratization of the Arab countries. The Arab countries as a region and cultural sphere are the only ones that have remained outside the contemporary global democratization processes, with the partial exceptions of Lebanon and Iraq, and Tunisia, which since October 2011 has been holding free elections.

However, since December 17, 2010, when Mohamed Bouazizi, a fruit vendor, set himself on fire to protest the police treatment, the so-called Arab Spring began. The Arab Spring reached practically all the Arab Republics. It caused the fall of Zine al-Abidine Ben in Tunisia in less than a month and after more than two decades of a mandate, it forced Hosni Mubarak in Egypt to resign on February 11, 2011, after almost three decades in power, the acceptance of a transition agreement by President Ali Abdullah Saleh

in Yemen, the assassination of Muammar Qadhafi in Libya, and the near-collapse of the Bashar al-Assad regime in Syria.

One of the most frequently used hypotheses to understand the authoritarian government's resilience in Arab countries is to understand the cultural sphere, specifically the Muslim religion, as the most significant explanatory variable. However, as a counter-example of Muslim-majority countries with democratic experiences, the case of Turkey and Indonesia can be cited. And countries with large Muslim populations like India and Nigeria also have democratic experiences.

Therefore, our hypothesis is that the resilience of the non-democratic governments of the Arab countries is explained by the combination of a rentier state with political elites of authoritarian vocation that is supported regionally, which has allowed the development of a regime with a diverse political instrument national and regional to stay in power.

The Arab Spring, the democratization of Tunisia, and even the failed attempts at democratization in the other Arab countries show that there is no Arab essentialism that prevents it from being democratic. Authoritarians rely on political and political economy elements to stay in power, and there is no insuperable cultural intrinsic element.

A fundamental and distinctive element of the Tunisian case was the moderation of the Ennahda Party. An Islamic party that due to its moderation was able to generate pacts with secular sectors, and the population, in general, did not see it as a threat of religious fundamentalism. Although the beginning of the revolution was a fortuitous event, the Ennahda Party and the secular opposition sectors had a decade of regular dialogues, creating a political society. The Armed Forces also played a very important role, during the Ben Ali administration they remained autonomous and institutional, so at the time of the protests, they prevented the police, close to Ben Ali, from using lethal force against the protesters, and they withdrew their support for the autocrat allowing him to leave for Saudi Arabia, thus guaranteeing a non-violent end. Additionally, Tunisia at the time of transition, had better economic indexes, higher levels of education, and a more moderate Islamic sector compared to the other Arab countries (Stepan and Linz, 2013).

Presently, Tunisian democracy faces several challenges. Since 2011 it has had eight prime ministers, of which three only in 2020. Additionally, it has high levels of corruption, unemployment, and fiscal deficit. This situation raises a vulnerability scenario where the distance between expectation and the real functioning of democracy generates discontent that can be capitalized on by non-democratic sectors.

On the other hand, Egypt has more than 98 million people and is the most populous and one of the most influential countries among the Arab community. The Muslim Brotherhood, the main opposition force, unlike the Tunisian Ennahda Party, maintained a high level of radicalism. That included the rejection of women's rights, of secular groups, and the requirement for the empowerment of an imam to ensure that new constitutional laws stayed aligned with the *shari'a*, which fragmented the opposition and prevented the creation of a common bloc. The military in Egypt never left power, was the Supreme Council of the Armed Forces who led the country during the transition, while in Tunisia was a civilian body. On average, the population is poorer and less educated than in Tunisia (Plattner, 2011; Stepan and Linz, 2013).

Thus, is evident that the successful and unsuccessful transitions of the Arab Spring cannot be explained by a single variable. There is a set of synergies, actors, and structural elements that have resulted in different scenarios.

Arab republics and monarchies have managed to combine and balance the mechanisms of representation, consultation, coaptation, and selective repression. In some countries, such as Algeria, Jordan, Kuwait, and Morocco, political competition is allowed, but this is characterized by not deriving a real power to legislate or govern. They have also achieved to maintain coalitions between economic and political elites (Diamond, 2010; Yom and Gause, 2012).

Fear has also been a fundamental tool for the maintenance of authoritarian regimes. By promoting fear, they seek to make believe that there are no alternatives to their government. The leaders of authoritarian regimes present themselves as the guarantors of order, the fundamental objective of politics, and more recently as protectors of secularism and efficient in economic modernization processes. And they present their rivals as extreme Islamism, the end of secularism, where women's rights will be eliminated. They also point as examples of the democracy dangers to the actions of Ayatollah Khomeini after the Iranian revolution of 1979, the Algerian civil war of 1991, and the current situation of civil war in Yemen, Syria, and Libya.

The eight monarchies, Jordan, Morocco, Saudi Arabia, Bahrain, Kuwait, Oman, Qatar, and the UAE have been especially resilient, in fact, exactly, the Arab Spring was itself the Arab *Republics* Spring. During the Arab Spring, there were no major jumps in these monarchies, most of the protests were punctual and with greater emphasis on the change of

the way of governing and not on the change of government, except for Bahrain which was close to become a revolution, but the clan al-Khalifa was helped by the Gulf Cooperation Council (GCC) led by Saudi Arabia. Arab monarchies are absolutists, kings and emirs rule in a discretionary way (Yom and Gause, 2012).

Oil has played a leading role in authoritarian regime maintenance, both at the regional and national levels. High dependence on oil not only makes a country's economy a rentier but also its State. A rentier State is characterized by a strong government in respect of civil society. The basic function is not the tax collection and its legitimacy does not go through its administrative capacities of these resources but rather captures international rent and distributes it selectively. The State is not redistributed but distributed. To the monopoly of violence, it adds the monopoly of economic sanctions, extraordinarily centralizing power.

Of the sixteen Arab countries, eleven are rentier, where the export of oil and gas represents more than 70, and even more than 90 percent in some cases, of the income of their states. There are also non-oil countries cases, but the international aid received has anrentier effect, since it also uses it to stay in power. For example, Egypt since the Camp David peace accords in 1978 has received more than $ 28 billion in development aid from the United States and more than $ 50 billion in military aid. Countries like Jordan and Morocco also receive large amounts of money from Northern countries. To this must be added, the political and diplomatic support that helps to legitimize these regimes in front of their societies. At the regional level, the financial and military support of Saudi Arabia to maintain the monarchies stands out, obtaining a foremost role leading the Gulf Cooperation Council (GCC). In 2011 Saudi Arabia, Kuwait, Qatar, and the UAE, through the GCC, contributed a stabilization fund for Bahrain and Oman of $ 20 billion and offered Morocco and Jordan $ 5 billion to join the organization (Yom and Gause, 2012; Diamond, 2010).

But there are also States where oil contributes a significant part of fiscal resources, and that do not have this logic of a rentier state. Karl (1997), to understand these exceptions, as in the case of Norway, points out that the fundamental thing is the moment when oil is discovered. In the case of Norway, when oil began to be exploited, there were already solid institutions while in the Arab countries, the economic and State modernization was linked to the industrialization of oil.

We consider this hypothesis correct but incomplete. It is stated that, indeed, the institutionalization before the oil exploitation process, limits

the logic of the rentier state. However, the appearance of oil in a context of low institutionalization does not automatically result in authoritarian rentier logic. It will depend on the vocation of the political elites. As the case of Venezuelan democratization shows, which we will analyze later, the industrialization of oil in low institutionalization contexts but with democratic elites, can achieve effective democratization.

Nor do we consider the Diamond (2010, p. 103) hypothesis correct, when he affirms that "When the global revolution in energy technology hits with full force, finally breaking the oil cartel, it will bring a decisive end to Arab political exceptionalism". We state as the case of Venezuela shows that the decrease in income generates a rebalancing of strategies. Limited to the capacity of coaptation and selective benefits, authoritarian repression increases.

Due to all these factors, the Arab countries remain the least democratized region of the world. But there is no intrinsic element that normalizes authoritarian governments. They are the consequence of political logic and political economy reinforced at the national and regional levels.

The Arab Spring is still going strong to challenge authoritarian regimes. In Sudan, the government is being run by a half-civil and half-military Sovereignty Council, after the thirty-year regime of Omar al-Bashir was ended in April 2019. In Allergy, Abdelaziz Bouteflika after twenty years of authoritarianism was forced to resign his candidacy for a new presidential term, although his close collaborator, Abdelmayid Tebún, came to power. Iraq in December 2019 and Lebanon in January 2020, Arab countries that are the most pluralistic with the exception of Tunisia, the prime ministers were forced to resign after massive civil protests.

Turkey and the Justice and Development Party (AKP) became a benchmark for defenders of democracy in Arab countries. Turkey, geopolitical belonging to Western Asia and, with a Muslim majority of 70 million people since 1950 functioned as a parliamentary and multiparty democracy, being governed since 2002 by the AKP, a democratic Islamist party.

The AKP government under the presidency of Recep Tayyip Erdogan during the first five years from 2002 to 2007 was characterized by the deepening of democracy. The civil control over the military was consolidated, the Kurdish ethnic identity was recognized and The Kurdish peace process began. There was a significant process of economic growth, and international relations with its neighbors were relaxed. However, after Erdogan's re-election, from 2002 to 2011, power was personalized in the figure of

the president, a significant secular group of allies was marginalized since Erdogan's, several democratization reforms were halted, and he manipulate the Kurdish question to secure the political agenda. And since 2011, with another electoral victory for the AKP there have been important setbacks in democracy, especially significant in the area of judiciary independence. During this period, Turkish politics has focused on security issues and facing threats from Daesh, which has earned it the political support and diplomatic backing of the countries of the North and has politically capitalized on the fear of the citizens, in the face of the historic terrorist attacks suffered. Meanwhile, the violation of human rights and limitations on political and civil liberties continue (Öniş, 2016; Yılmaz, 2017).

Erdogan has not only won elections but has also overcome a coup such as the one of July 15, 2016. After the failed coup, the government has become more authoritarian, has increased repression against the opposition, coerced the freedom of expression of the media, academia, and civil society in general, and forced in March 2019 to hold Istanbul municipal elections again after the AKP had lost. But the instrument that seeks to legalize this situation is the amendment to the constitution of April 2017.

The Turkish case, like the Venezuelan, shows that the autocrats as they overcome democratic and non-democratic obstacles are managing to establish themselves in power with the same plurality of instruments. Within these instruments, the Turkish and Venezuelan cases also illustrate what has been called legalized authoritarianism. Where not only is the autonomy of the judiciary and electoral bodies limited, but these are instrumentalized to meet the needs of the autocrat.

One of the concepts most used to describe these hybrid regimes is Levitsky and Way (2005: 5) competitive authoritarianism. For these authors, competitive authoritarianism is a type of hybrid, undemocratic regime distinguished by being a civil regime where formal democratic institutions are the mechanisms to achieve government. But the holders of state power abuse their position to have significant advantages in the competition for power. However, we consider that this concept is not entirely accurate, since in the case of Turkey, and as will be seen with the Venezuelan case, the autocrats have damaged the electoral spaces but their main effort has been to co-adopt the liberal dimension of the democracy. The rule of law has made changes in formal institutions to concentrate and maintain the power of legalizing authoritarianism.

For this reason, Miranda (2020b) proposes the concept of legalized authoritarianism and defines it as a non-democratic hybrid regime

characterized by manipulating institutions and laws to maintain and concentrate power. It restricts the autonomy of the electoral authorities and the rule of law. It does not limit the presidency power but it is its main articulator. In legalized authoritarianism, laws are an instrument to transform their abuses and excesses into legally justified forms and actions, and the State is the legal expression of authoritarian hegemony. Laws are generally unconsulted since they maintain control of the legislative power, and their application and interpretation are guaranteed by the judiciary. Also dominated by the executive, the constitutional separation of powers is only a facade than they are articulated and subordinate to the executive power.

Thus, legalized authoritarianism is one of the main challenges for contemporary democracy in the Global South.

On the other hand, Indonesia with its 287 million people is the most populous country in Southeast Asia and the most populous with a Muslim majority (90 percent declare themselves Muslim) worldwide, with a significant plurality that has more than 500 groups ethnolinguistic, and at the time of democratization, it was in a relative poverty situation and a regional context not very friendly to democracy. For more than thirty years Suharto ruled the country together with the military in an authoritarian way, limiting and controlling civil and political freedoms. However, after the collapse of the Suharto regime in the late 1990s and the first general elections in June 1990, the democratization process began.

Indonesia has been characterized by a political regime with extensive political and civil liberties, peaceful rotation of rulers, political parties' plurality, an active civil society, and freedom of the press. This has been thanks, especially, to the actions of the main political actors, the modernist and urban Muhammadiyah movement and the traditional and rural Nahdlatul Ulama. Both have contributed to valuing plurality and the values of democracy in general, and the former was one of the main opponents of the Suharto regime (Webber, 2006).

At present, the main challenge for Indonesian democracy is civil unrest due to socioeconomic difficulties, which enhances the possibility of authoritarianism or the other phenomenon that threatens democracy in the Global South and worldwide, populism.

For Miranda (2020b, p.29), populism is a specific way of competing and exercising political power, distinguished by proposing a deinstitutionalized and direct relationship between the ruler and the ruled, and a friend/enemy discursiveness. Populism re-politicizes civil society in an undemocratic way, legitimacy does not pass through democracy and

liberalism, but through a non-liberal and distorted conception of democracy, and where agreements and dialogue are not the distinctive features but rather the mobilizations and plebiscites, politics is no longer seen as the construction of the public good but as the struggle between friend/enemy. Populism seeks to accumulate power in the executive to the detriment of counterweights and accountability, and social plurality and demands are reduced to a vertical homogenizing discourse.

India is a case of populism. As noted in the previous section, after Nehru's death, India's politics was characterized by instability. Nehru's successor, Lal Bahadur Shastri, also died unexpectedly. Indira Gandhi assumed the presidency of India. She was the second woman to lead a country, just after Sirimavo Bandaranaike in Ceylon.

Gandhi sought to personalize politics and a direct relationship with the people, marginalizing the Congress Party, which she reduced to an electoral machine. Centralized and nationalized politics, reduced autonomy to regional and local spaces, undermined judicial autonomy, politicized the civil service, and especially damaging, compromised secularism. Gandhi was re-elected with popularity never seen before in India, thanks to his anti-poverty rhetoric and the military victory over Pakistan. But increasingly, the elections took on a plebiscite character. On June 26, 1975, she declared the Emergency, judicial procedures and democratic rights were suspended, public meetings of more than five citizens were prohibited, the media was censored, Parliament and the cabinet were constantly ignored and in January 1977 called elections for March of that year. The opposition Janata coalition won for the first time in history, the Congress Party lost the national government and obtained less than 40% of the votes, 34%. The elected Prime Minister was Morarji Desai (Kothari, 1988; Ganguly, 2019, Ganguly, 2002).

Indira Gandhi was reelected in 1980. During her administration ordered a bloody military assault on a Sikh holy site, prompting her assassination in 1984 at the hands of her Sikh bodyguard and violent religious clashes. Her successor was her son Rajiv Gandhi, who could not do too much to repair regional and caste fractures. Rajiv was also assassinated, in May 1991 by a Tamil from Sri Lanka.

But even populism is more accentuated, in the current situation of the Indian political system, with the Bharatiya Janata Party (BJP) in power and Narendra Modi as Prime Minister. The BJP is a nationalist, Hindu, anti-intellectual party, whose main resource to reach power was the media, in campaigns that included GIS mapping, advertising saturation campaigns,

contradictory messages to different audiences, misinformation, and negative images of its opponents.

How Ganguly (2019) warns, during the Modi administration the minorities' rights, freedom of expression, and the cultural and intellectual autonomy of institutions have been reduced, placing in danger the secular and pluralist foundations of democracy and the Indian State.

On the other hand, Brazil, the most populous country with more than 200 million people and the one with the largest international projection in Latin America, also currently has a populist government. Jair Bolsonaro, a right-wing reserve military officer, was elected president in 2018. His administration has been especially conflictive. He has sought to undermine the autonomy of the other powers of the State, delegitimize traditional political parties, and has maintained friend/enemy rhetoric in the face of his opponents. His main allies have been the Evangelical Church and the Armed Forces, who have strengthened against civil control (Neto and Alves, 2020; Miranda, 2020a).

So India and Brazil, the two great leaders of the Global South, have populist governments. Due to its high influence, this limits the capacity for cooperation among countries of the Global South in democratic matters.

The Venezuelan case analysis is especially important for our study because lets us analyze three phenomena with important theoretical derivatives and representative of the contemporary challenges of democracy in the Global South. First, like the oil industrialization at low political institutionalization levels, but with a democratic vocation of the political elites, allows an effective democratization process. Second, how can a stable democracy break down and populism emerge, and what is the role of oil with this change in vocation. And finally, another case of legalized authoritarianism is exemplified, and how the decrease in income does not make authoritarian regimes fall but makes them more repressive.

The so-called Venezuelan democratic period began in 1958 without much experience with democracy or civil governments in the country. During the next two decades, a pact of democratic commitment, limited competition, and a minimum program was maintained that managed to stabilize the country, all the presidents alternated ending their constitutional terms, and one of the strongest bipartisanships in the world was constituted. Political parties were the main actors of the political system, highly institutionalized, disciplined, and centralized, with solid ties with sectors of organized civil society and broad identification with society in general. Thanks to the oil income, the State functions multiplied and expanded throughout the national territory,

and important socioeconomic successes were achieved, especially in health and education, the country became industrialized. And all this in a context of massive popular support and an electoral turnout of around 90 percent of voters. Venezuelan democracy was considered one of the best in the Global South (Miranda, 2019b; Miranda, 2017b; Miranda, 2017c).

Thus, Venezuela is an example of how oil income, combined with the democratic vocation of the political elite, can contribute to democratization. Oil income is not intrinsically negative. Political economy consequences depend on how it is used.

However, at the end of the 1970s, the political model was exhausted. Political parties moved away from civil society, oil revenues fell, generating a context of increased poverty, inequality and unemployment, and the corruption level was up. In this context, Lieutenant Colonel Hugo Chávez, the leader of a failed coup in 1992, won a free and competitive presidential election. During the first years of his administration, he focused his efforts on changing the laws to concentrate and stay in power, articulating all the State powers for his benefit. At the same time, thanks to the bonanza in oil revenues, he selectively deployed a set of welfare and clientelistic policies to maintain popular support, gave him numerous plebiscitary electoral victories. Then, after the oil rent bonanza reduction, the Chávez administration lost legitimacy due to its inability to offer clientelistic policies, which was offset by the increase in repression and the limitation of civil and political rights (Miranda, 2019b; Miranda, 2017b).

Additionally, this populist and rentier nature has promoted a contagion effect in the region. As Miranda (2020b) points out, Nicaragua has also benefited from Venezuelan oil income. It is estimated that oil cooperation from Chávez reached more than 500 million dollars annually since the arrival of Daniel Ortega to power, that is, around 7 percent of Nicaraguan GDP. Additionally, the Venezuelan cooperation funds were administered outside the budget law, which allowed the Ortega administration to have a greater discretionary capacity for its selective clientelist policies. Ortega has also sought to change the laws and articulate the powers of the State in his favor, limiting the civil and political rights of the opposition.

Returning to Venezuela, during the current administration of Nicolás Maduro, the Government has become less competitive, with less capacity to offer clientelistic policies, and therefore, more repressive. Of the most noteworthy elements, we can point out the lack of autonomy of the electoral authority, grave injuries to human rights, the militarization of citizen security, selective political repression, all in a national context of

humanitarian crisis characterized by the shortage of food and medicine, the continual suspension of public services, and high rates of violence and insecurity.

Additionally, is also noted that there is no consolidation of democracy. That even in a stable democracy, with a strong party system, and progress in socio-economic matters, some of these variables may regress, generating a breakdown of democracy.

Finally, another general hypothesis that does not support the evidence from the Global South is the theory of modernization. This indicates that countries to achieve democracy have as a precondition reaching certain socioeconomic levels. The evidence from Sub-Saharan Africa refutes it.

In most Sub-Saharan African countries, coups d'état have been replaced by elections, they are constitutional governments that include, at least formally, separation of power, protection of fundamental rights, anti-corruption commissions, electoral bodies, time limits to the presidencies. Civil society has also been strengthened thanks to the expansion of communication media. However, they highlight as general challenges to democracy the low commitment of political elites to the values of this form of government, threats to freedom of expression, corruption, nepotism, and the inability to respond to the most needs society's pressing forces, such as poverty and insecurity.

The case of Nigeria deserves special attention because is the most populous country in Africa with more than 60 million people and one of the most influential in all of Sub-Saharan Africa. Despite the consolidation of elections as a way of accessing power, the installation of a party system, and the control of civilians over the military, the elections have not been entirely competitive. Power has been personalized, the civil elites maintain an authoritarian vocation, legal mechanisms have been used to limit the opposition, the relationship with civil society has been patronizing, and the military has found other ways to influence the country politics (Fasakin, 2015). For its part, South Africa also deserves special attention for its regional influence and international projection. The party of the African National Congress (ANC) with which Nelson Mandela came to the presidency inaugurating democracy, has maintained the power to the present. It is being confused in recent years with the state apparatus. South Africa, like many countries in the region, combines elections and formal democracy with limited competition through selective violence, intra-elite conflict, extensive poverty, high inequality levels, and high levels of widespread violence (Von Holdt, 2013).

There are also more complex African cases, such as those having difficulties with state-building. Sub-Saharan Africa is the region of the world where the State is weakest. Countries such as Sudan, South Sudan, Somalia, the Democratic Republic of the Congo, the Central African Republic and Chad, have not been able to guarantee the monopoly of violence or the control of their territory. In Asia, Afghanistan has not achieved political order either, and therefore, there is no framework for the development of democracy.

4. Conclusions

This study has contributed to a cosmopolitan vision of democracy. It was exposed that democracy is not only a universal value but has empirically reached very different latitudes. So, it can be said that democracy is a universal heritage. Additionally, this study has contributed to rebuilding the history of democracy in a broad and plural way.

Theoretically, it has also made contributions. Empirical elements were provided, with the cases of Uruguay and Costa Rica. This sustains that the quality of democracy depends significantly on the functioning and resilience of the political party system, on the plurality of programmatic agendas, and on management capacity, that have governments to respond to the needs of civil society, including non-political spheres, such as socioeconomic conditions.

With the analysis of the cases of India, Botswana, and Indonesia, It was evident that the modernization theory postulates are not correct, since countries with generalized poverty can achieve democracy. Nor is it true that with a high religious and cultural plurality, as in India and Indonesia, democracy cannot be achieved. From this study, is concluded that these elements are not insurmountable preconditions for countries to achieve democratization. These hypotheses are based on the historical experiences of democratization in the Global North. Therefore, analyses of democracies in the Global South not only support to understanding the countries of these regions but also contribute to comprehending the North and improving the theoretical frameworks.

Is emphasized that there is also no intrinsic element in the Arab countries or in the Muslim religion that prevents democracy. Arab countries have made significant contributions to democracy throughout history. The current democratization difficulties of the Arab countries correspond to political and political economy elements, where the explanatory variables

are the authoritarian vocation of their elites, the political economy of oil revenues, and the regional context of mutual support between authoritarian regimes.

The political economy hypothesis about oil rent was also sophisticated. It was accepted that the political economy effects of oil income depend on when the oil appeared, whether it was before or after it had reached institutional stability. However, even in the context of low institutionalization, the relationship between oil income and authoritarianism is not automatic. It will depend on the vocation of the political elites, as demonstrated by the democratization of Venezuela. The low institutional framework makes the vocation of the political elites an even more relevant variable than in the context of high-quality institutions.

A more pertinent category was offered to analyze contemporary authoritarianism, that of legalized authoritarianism. That unlike the other adjectives, it captures more exactly as autocrats, rather than weakening the other powers of the State, which is what the most frequently used categories emphasize what they seek is to co-opt and articulate these powers in your benefit. This was evidenced in the analysis of the cases of Turkey, Venezuela, and Nicaragua.

Finally, the study contributed to the analysis of populism, which is one of the most common contemporary political phenomena worldwide. Populism emerges when coincide with the political parties' inability to articulate demands with civil society's dissatisfaction and the perception of inability to affect the public agenda. This was illustrated by the cases of India, Brazil, and Venezuela.

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