Culture and Regimes: The Democratizing Force of Emancipative Values

CHRISTIAN WELZEL

Abstract

This essay argues that high-quality democracy cannot persist in the absence of emancipative values, as much as autocracy cannot persist in their presence. Support for democracy, by contrast, is an altogether misleading indicator of a public's affinity to democracy because what support for democracy means depends entirely on emancipative values: In the presence of emancipative values, people support democracy out of a genuine appreciation of the freedoms that define democracy; but in the absence of emancipative values, people typically misunderstand democracy in authoritarian ways that revert the meaning of support for democracy into its own contradiction: support for autocracy, that is. Hence, autocracy is often more legitimate in people's eyes than the support ratings for democracy suggest. Accordingly, the prospects of democracy are bleak where emancipative values remain weak. These insights provide good reasons to consider emancipative values as a study object of foremost importance, if we are to understand the cultural foundations of democracy.

INTRODUCTION

Almond and Verba (1963, p. 498), in unison with Eckstein (1966, p. 1), introduced the term *congruence*, claiming that political regimes become stable only in so far as their authority patterns meet a population's firmly encultured authority beliefs. According to the congruence thesis, authoritarian regimes are stable when people idolize strong leaders who rule with an iron fist, just as democratic regimes are stable when people believe that political authority ought to be subject to horizontal checks and public consent.

Inglehart and Welzel (2005, p. 187) extended these propositions to show that encultured authority beliefs explain "democratic backsliding" and autocratization in regimes that temporarily climbed to higher levels of democracy than the population's prevalent value orientations support.

Culture also explains the resilience of authoritarianism in regimes in which autocratic power concentration is congruent with most people's normative expectations. Finally, culture explains transitions toward and the subsequent sustenance of democracy among populations that came to firmly believe in democratic principles, particularly universal freedoms.

THE CENTRALITY OF EMANCIPATIVE VALUES

Much of the political culture literature considers explicit popular preferences for democracy to be an indication of a public's genuine demand for democracy (Bratton, Mattes, & Gymiah-Boadi, 2005). However, recent evidence questions the presumption that most people express approval of the word "democracy" out of a genuine appreciation of the freedoms that define democracy in liberal thought (Welzel, 2013, Chapter 10).

So how can we know that people support democracy out of a firm belief in its defining freedoms? Democracy is an emancipatory achievement that frees people from oppression and discrimination and empowers them "to live the lives they have reason to value" (Sen, 1999). Thus, the values motivating democracy emphasize equality, liberty, tolerance, and empowering people to govern themselves, in both private and public life. People who value these goals over others emphasize "emancipative values" (Welzel, 2013). These people understand democracy accurately as a system that grants freedoms and they support it for this reason, and not as a means to other ends, such as prosperity. They also don't misunderstand democracy as something that contradicts the very definition of democracy, like strongman rule. Hence, it is emancipative values and not the explicit avowal of the word "democracy" that shapes a population's true affinity to democracy. In accordance with this conclusion, Welzel (2013, Chapter 8) provides compelling evidence showing that how firmly emancipative values are encultured in a population has far greater predictive power over the actual democratic quality of the respective regime than has the proportion of the population expressing an explicit endorsement of the word "democracy."

MEASURING EMANCIPATIVE VALUES

Using public opinion data from more than a hundred countries covered by the World Values Surveys, Welzel (2013, Chapter 2) explains how to measure emancipative values. The index of emancipative values is an additive summary over a total of 12 survey items, which touch on four domains of human emancipation, namely an emphasis on child autonomy, gender equality, sexual self-determination, and popular voice. Overall, this

index measures support for freedom of choice and equality of opportunities, which combines a libertarian with an egalitarian element into an emancipatory orientation. Index scores range from a theoretical minimum of 0 when a respondent takes the least emancipatory position on all 12 items to a maximum of 1.0 when she or he takes the most emancipatory position on all items. Decimal fractions of 1 indicate intermediate positions. To estimate how firmly encultured these emancipative values are in a given country-population, Welzel calculates the arithmetic sample mean on this emancipative values index.

   Assigning each national population a single score for emancipative values glosses over inner-societal variation. National cultures exhibit no monolithic mentality; they are, instead, divided by inner-societal cleavages. Nevertheless, it is possible to identify where the bulk of a population is positioned on emancipation. The arithmetic mean is the best representative of a national culture's central tendency in this regard, which is manifest in the fact that country-wise distributions on the index of emancipative values show strongly mean-clustered, single-peaked shapes for each national population. Furthermore, even though national populations differ internally over emancipative values along such cleavage lines as age, gender, social class, ethnicity and religious denomination, these inner-national differences are far smaller than the mean-level differences between nations. The power of nations to cluster the orientations of their people reflects the power of culture to homogenize people within cultural boundaries and to diversify them across these boundaries. In light of this evidence, it is justifiable to use country-wise population means as an indication of how firmly encultured emancipative values are in the respective society.

   Some scholars criticize the concept of emancipative values because the index components do not always appear to be interchangeable reflections of a single underlying dimension (Aléman & Woods, 2016; Sokolov 2018). This criticism only considers the "dimensional" logic of index construction and, thus, overlooks the alternative logic, which is also valid: the "combinatory" logic. In the combinatory logic, it is the additive presence of a construct's components that accounts for the construct's consequences, irrespective of how cohesive the construct's constituents are in a country. Indeed, Welzel and Inglehart (2016) show that the effects of emancipative values are insensitive to cross-country variability in these values' inter-item cohesion. This cohesion can be anything from weak to strong, but this variability leaves unaffected the items' combined effects, which speaks to "compositional substitutability": an index's combined functioning is insensitive to variability in its single constituents' salience, strength, and cohesion. Whenever this is the case, an index is valid in combinatory logic.

REGIME LEGITIMACY MISUNDERSTOOD

Cross-national surveys show that large majorities of people around the world support democracy, no matter in what type of regime they live. Often, these majorities are larger in autocracies than in democracies, including 90% of the population and more (Norris, 2011). Many scholars interpret these numbers as evidence that the freedoms inherent in liberal democracy represent a universal human desire and that these desires are felt the most where people lack their realization the most (Maseland & van Hoorn, 2012). This interpretation presumes that autocratic regimes are almost always illegitimate in the eyes of their people and persist despite this illegitimacy because of their ability to suppress dissenting majorities, no matter how large these majorities are. The same interpretation also presumes that people who express support for democracy in an autocracy understand democracy accurately as the penultimate alternative to their type of government.

However, recent evidence proves each of these presumptions fundamentally wrong. Whether people express support for democracy out of a genuine commitment to democracy's defining freedoms is evident in emancipative values because they address these freedoms. And since emancipative values vary massively across this world's cultures, the desire for democratic freedoms is not universally human but culturally conditioned, with emancipative values being the most important condition. Indeed, where emancipative values remain weak, most people misunderstand democracy in authoritarian ways, namely as the rule of "wise" leaders to which people owe obedience because the rulers' wisdom guides them to govern in the best of all people's interest (Welzel & Kirsch, 2018). It is noteworthy in this context that most autocracies in the world, including some of the most repressive ones, depict themselves as democratic in their propaganda. The typical narrative is to denounce Western democracy as a perversion of "true" democracy, which is then redefined as some form of guardianship under terms such as *guided*, *managed*, *sovereign*, or *socialist* democracy. As long as emancipative values remain weak, ordinary people lack the moral strength to resist this authoritarian indoctrination and believe in it, visible in what Welzel and Kirsch (2018) have unmasked as authoritarian notions of democracy. In line with these authoritarian notions, people misperceive their regimes as democratic when in fact they are autocratic (Kruse, Ravlik, & Welzel, 2017). This pattern as well maps strongly on emancipative values, which need to be strong to turn people against authoritarian misunderstandings of democracy. All this evidence supports a fundamental revision of our interpretation of support for democracy in autocracies: coupled with authoritarian

notions of democracy, support for democracy reverts its meaning into its own contradiction: support for autocracy, that is (Welzel & Inglehart, 2018).

The alternative interpretation is to posit that people in autocracies express authoritarian notions of democracy to hide their alternative regime preference for democracy. This assumption, however, is highly implausible in light of the data. If people's first concern was to hide an alternative regime preference for democracy, they should avoid expressing support for democracy to begin with. In fact, however, people express support for democracy in autocracies no less than in democracies. Thus, support for democracy is rather a constant than a variable. What really varies is the notions of democracy and the values that inspire them.

Political scientists argue since long that different types of regimes successfully instrumentalize schools, the media, and other socialization agents to instill in people the values that fit the regime's underlying norms. These are forms of cultural manipulation that operate against emancipative values, which autocratic elites fight because the spirit of these values undermines the obedience that autocracy needs to function. Openly disqualifying emancipative values as bound to the West and, thus, alien to a country's national culture serves the purpose of cementing an anti-Western identity that shields people from the appeal of emancipative values. Breeding national, ethnic and religious sentiments and other forms of parochial identities are part of this psychological game. Hence, autocratic regimes tend to nurture an anti-emancipative culture of national exceptionalism or suprematism that fit their authoritarian norms. Some authors take this insight to suggest that emancipative values can *only* mature in democracies (Hadenius & Teorell, 2005).

THE EMANCIPATORY IMPULSE OF ACTION RESOURCES

At first glance, the assumption that regime features shape emancipative values seems to be accurate. Indeed, regime characteristics, such as the level of state repression and the scope of democratic freedoms, show a systematic relationship with the spread of emancipative values in a country, at least before proper controls: The lower the level of state repression and the wider the scope of democratic freedoms are, the more widespread emancipative values tend to be (Welzel, 2013, Chapter 8).

Yet, the direct impact of regime characteristics on emancipative values drops drastically in both strength and significance once one takes "action resources" into account. Action resources include (i) *material* means, like food, shelter, household equipment, and monetary incomes that improve people's living standard and enhance their economic power. Action

resources include (ii) *intellectual* skills deriving from information, education, and knowledge, all of which improve people's reasoning capacity, including their ability to think for themselves and to empathize with unfamiliar others. Action resources include (iii) *connective* opportunities, which multiply with urban density and the modern means of transportation and communication, thus enhancing people's possibilities to touch base with like-minded others for a joint purpose (Welzel, 2013, Chapter 1).

Action resources in this sense pervasively change the human condition, transforming life from a source of coercive pressures that dictate one's actions into a source of opportunities to pursue a purpose of one's choice. This coercion-to-opportunity turn in the nature of human existence started out in a handful of Western societies with the Industrial Revolution but is now rapidly expanding into most of the world through globalization. This sea change in the nature of life, which Welzel (2013) describes as human emancipation, is a true novelty in the history of our species.

Indeed, until 200 years ago human existence was almost always and everywhere precarious, entrapped in a constant struggle against famine, pestilence, and violence. But with the growth of action resources among ordinary people in modern times, the individual person gains profoundly in agency because action resources empower people to pursue a purpose of their choice. Hence, there is a liberating impulse in modernity as it frees individuals from perennial existential constraints. To the extent to which this liberating impulse affects the lives of wide population segments, modernity also has an equalizing impulse that closes the power gap between the masses and the elite. The invention and spread of modern-day democracy is the institutional tribute to this groundbreaking shift in societal power structures (Pinker 2017).

From the viewpoint of the mass-elite power balance, it is important to note that greater action resources in the hands of ordinary people also means greater resources of *collective* action. In other words, when people are more capable to pursue a purpose of their choice, this capability gain also includes *shared* purposes for which people join forces on a voluntary basis. These changes strengthen civil society and social movements vis-à-vis the state. Hence, growing action resources in the hands of ordinary people infuse societies with greater self-coordinating capacities, including the capacity to organize effective resistance against oppressive elites (Welzel, 2013, Chapter 7).

The nature of life varies on a continuum from coercive pressures, at one polar end, to opportunities for choice at the opposite end. Intimately related, human mentalities vary on a continuum from *preventive closure*, at one extreme end, to *promotive openness* at the other. Variation on this continuum evolved as a psychological adaptation to objective living conditions (Welzel,

2014). When life circumstances change in similar fashion for the bulk of a population, we see these psychological adaptations operate on the level of entire national mentalities, with shifting central tendencies in a population's dominant orientations. These adaptations keep human mentalities in touch with reality, which is essential to our species' survival and well-being. Furthermore, the adaptability of mentalities allows for the natural evolution of moral systems. For this reason, technological progress has been followed by a moral progression toward emancipative values (Alexander, Inglehart, & Welzel, 2015). In fact, the strength and spread of emancipative values in a society tells one where on the continuum from preventive closure to promotive openness the collective mentality of the respective population is located: Weaker emancipative values indicate a position closer to preventive closure; stronger emancipative values indicate a position closer to promotive openness.

For these reasons, emancipative values evolve in close association with action resources, which shift life circumstances from constraints to opportunities (Alexander *et al.*, 2015). There is nothing particularly Western about emancipative values from this point of view: Emancipative values are most widespread in Western societies not because these societies are Western but because they have experienced the most massive growth of action resources in the hands of ordinary people. Insofar as action resources grow among the populations of non-Western countries, emancipative values are emerging there as well. This is a natural mentality change. The reason is that the key evolved gift of our species, intelligence, equips all members of humankind with the potential to think for themselves. As soon as spreading education, information and communication activate this potential, people gain intellectual autonomy. As a direct consequence, people lose their need for doctrinal guidance and they no longer wish to be told what to think and what to do. In this moment, people begin to perceive unchecked authority as arrogated rather than legitimate, which inevitably makes them find appeal in emancipative values.

Logically, to the extent to which action resources and the related life opportunities distribute unequally across different population segments, emancipative values progress in a socially layered manner: Their rise is least pronounced among lower-class segments in which people command lesser action resources and, accordingly, live in greater existential insecurity. Thus, social inequality in action resources leads to social polarization over emancipative values, with those "left behind" finding appeal in populist ideologies that advocate a backlash of cultural values. Recent electoral triumphs of right-wing populism, from Brexit to Trump, illustrate this pattern (Alexander & Welzel, 2017).

THE PSYCHOLOGICAL ANTIPODES OF EMANCIPATIVE VALUES

Emancipative values need to be seen in the context of their direct psychological antipodes, three of which are of particular importance. Since emancipative values embody a cosmopolitan orientation, the three antipodes each incorporate the exact opposite: a parochial orientation. The antipodes I have in mind are familism, religiosity, and nationalism, or more precisely supremacist versions of these orientations, which stylize the own clan, the own religion, and the own nation as inherently superior to others (Alexander *et al.*, 2015). Familism, religiosity, and nationalism are parochial in the sense that they establish an impermeable "us-and-them" separation that sustains exclusionary group identities with the purpose to limit solidarity to the in-group. Authoritarianism, fundamentalism, and nativist populism all appeal to these parochial "we first" orientations. These appeals are powerful because they directly address a tribal instinct—the instinct to turn back to preventive closure when we perceive a threat linked to a recognizable out-group. Where these parochial orientations persist, emancipative values cannot flourish. In fact, they can even revert. These are the situations in which authoritarianism can persist and when democratic backsliding becomes more likely. Conversely, however, when action resources diffuse so widely and equally that group boundaries lose their salience, parochial orientations lose their appeal, and the identity shield against emancipative values begins to erode.

THE "TECTONIC MODEL" OF REGIME CHANGE AND STABILITY

Emancipative values change at a glacial pace, growing in small increments. Over recent decades, these moves have been, for the most part, progressive. The key defining feature of liberal democracy—civic entitlements—also evolved, for the most part, progressively, albeit in sudden disruptive shifts (Welzel, 2013, Chapter 4). The joint progression of both emancipative values and civic entitlements reflects a co-evolutionary dynamic that sustains a strong correlation between both variables at each temporal cross-section. But is it possible to identify the driver in the progressive parallelism between these two variables when one of them proceeds incrementally and the other disruptively? The "emancipatory theory of regime change and stability" by Welzel, Inglehart, and Kruse (2015) formulates testable predictions to this end.

In phrasing these predictions, the authors conceptualize the relationship between emancipative values and civic entitlements as a supply–demand linkage with respect to democratic freedoms. In this relationship, civic entitlements constitute the *elite*-side *supply* of democratic freedoms, while emancipative values constitute the *mass*-side *demand* for them. Since

demands change glacially through continuous incremental steps, while supplies change disruptively through rare sudden jumps, Welzel, Inglehart, and Kruse summarize their co-evolutionary dynamic as what they call the "tectonic model" of regime change: Incrementally changing demands build up an accruing tension with stagnant supplies, until this tension releases through a sudden disruptive shift that brings the supplies back into equilibrium with the demands. Accordingly, the direction and scope of regime change operates as a correction of the supply's initial misfit to the demand. To confirm these propositions empirically, three distinct regularities must show up in observational data:

1. Where the elite-side supply of freedoms *falls short* of the mass-side demand, an occurring regime change shifts the supply *up*ward—to the extent to which the supply previously fell short of the demand. In this case, we observe transitions *toward* democracy or, in short, democratization.
2. Where the elite-side supply of freedoms *exceeds* the mass-side demand, an occurring regime change shifts the supply *down*ward—to the extent to which the supply previously exceeded the demand. In this scenario, we witness transitions *away* from democracy or, in short, autocratization.
3. Where the elite-side supply of freedoms fits the mass-side demand for them, no regime change occurs and the supply stays where it was. This is the case of regime *stability*, which can be either democratic or autocratic stability.

Political science knows separate explanations of (i) the emergence of democracies, (ii) the breakdown of democracies and their recession into autocracies, (iii) the survival of democracies, and (iv) the stability of autocracies. Yet, all these explanations co-exist rather isolated from each other. In fact, several authors argue that the causes of these various aspects of regime stability and regime change are different in kind and largely incomparable. Against this backdrop, it is an outstanding feature of the "tectonic model" that it unifies explanations of the two opposite versions of regime change—democratization and autocratization—as well as the two opposite forms of regime stability—democratic and autocratic stability—in a single theory. This single theory provides a unified framework to understand regime stability and regime change, based on a unitary principle: the direction and degree of incongruence between regime institutions and cultural values.

Now, to test whether observed data support the "tectonic model," one must map regime changes occurring within a defined time window on

the supply–demand misfits present at the opening of this time window. Welzel *et al*.'s (2015) regression analyses, depicted in Figures 2 and 3 of their article, demonstrate exactly these points for almost a hundred countries from all over the globe, including more than 90% of the world population. Indeed, between 1980 and 2010, countries like Zimbabwe, Nigeria, and Venezuela starting out with freedom supplies largely exceeding freedom demands in 1980 experienced a corresponding supply drop by 2010. These are cases of autocratization. Conversely, countries like Chile, Slovenia and Taiwan starting out with freedom supplies far short of demands in 1980 experienced a corresponding supply jump by 2010. Finally, countries with supplies starting out at equilibrium with demands in 1980 experienced little shift in supply by 2010. The latter pattern is typical for most Western countries, which sustained a democratic equilibrium, as well as for most Middle Eastern countries, which sustained an autocratic equilibrium over this period. Overall, the direction and scope of the supply–demand misfit explains a highly significant 57% of the entire cross-national variation in the direction and scope of regime changes, toward and away from democracy. Since regime stability is merely the inverse of regime change, the model also explains the former, and it does so equally well for both democracies and autocracies.

Putting things together, the direction and scope of regime change operate largely as a function of the regimes' initial misfit with their surrounding culture, in striking confirmation of the "tectonic model" of regime change. Still, the relationship between emancipative values and civic entitlements could be reciprocal, such that values also change in response to their initial misfit to the regimes' democratic quality: Values could be *over*-emancipative when they score higher than the regime's scope of civic entitlements suggests. Or they could be *under*-emancipative when they score lower than the regime's scope of civic entitlements suggests. Now, if regimes—merely by means of their presence—instill congruent values into people, emancipative values would change as a function of their misfit with the regime's civic entitlements: Initially, over-emancipative values subsequently turn less emancipative, at the same time as initially under-emancipative values subsequently turn more emancipative. The analyses by Welzel *et al*. (2015) conclusively disprove this interpretation. Indeed, people's values have mostly turned more emancipative, regardless of whether or not they misfitted the regime's civic entitlements in a previous period.

FURTHER EVIDENCE

The conceptual diagram in Figure 1 places emancipative values center stage in Welzel's encompassing theory of human emancipation. This theory
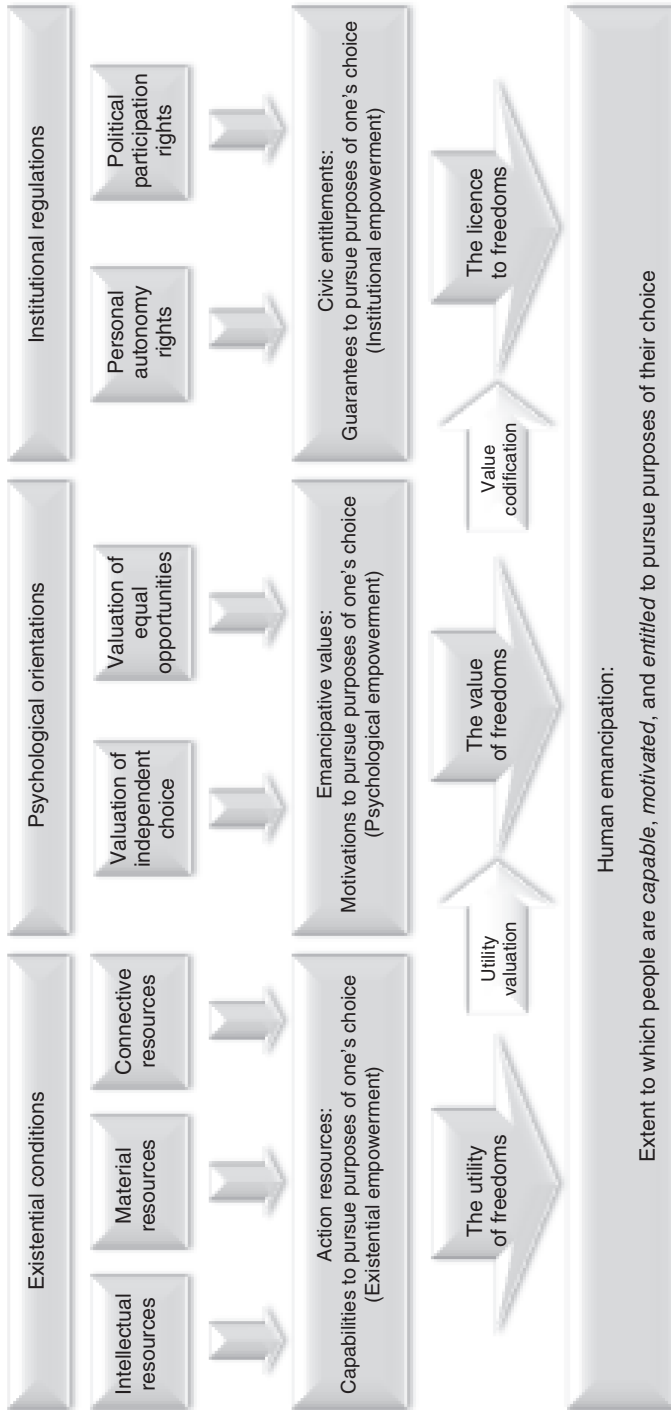
Figure 1 Societal progress as human emancipation. *Source:* Reprint of Figure 1.1 in Welzel (2013, p. 44), by permission of the author, see: www.cambridge.org/9781107664838.

identifies the core theme of societal progress as "human emancipation," which is the process by which (i) growing action resources, (ii) rising emancipative values, and (iii) expanding civic entitlements work together in enhancing ordinary people's agency in pursuing purposes of their choice. The theory of emancipation suggests a sequence in the co-evolution of its three key ingredients such that (i) emancipative values rise in response to growing action resources, while (ii) civic entitlements expand in response to risen emancipative values and grown action resources.

Using information incorporated in the trend- and cohort-patterns of emancipative values, Welzel (2013, Chapter 4) estimated these values backward in time all the way to 1940–1950 for about 80 countries worldwide that represent more than 90% of the world population. Based on these estimates, Figure 2 documents the co-evolution of the three components of human emancipation, separately for the 10 culture zones in Welzel's historically grounded culture zone scheme. Three insights become clear from these diagrams: first, the trend has been overwhelmingly progressive in each component of human emancipation and this is true for the world as a whole; second, the components evolve tightly linked to each other, with emancipative values rising alongside action resources and civic entitlements following emancipative values; third, Western cultures have been in the lead position and continue to hold this position in the overall emancipatory dynamic.

CONCLUSION

Emancipative values are the most important aspect of political culture concerning a population's readiness for democracy. These values are not a culture-bound product that belongs exclusively to the West. Instead, emancipative values emerge as part of a broader process of human emancipation that evolves naturally as economic development places more action resources into the hands of ordinary people. The desire to pursue a purpose of one's choice that inevitably emerges with emancipative values directs people's attention toward civic entitlements that guarantee freedom of choice—which is the central theme of democracy. For these reasons, emancipative values provide the key selective force in the evolution of political regimes. The resulting selective pressures operate in favor of democracy because emancipative values build the grassroots motivations that channel mass support toward pro-democratic actors and away from anti-democratic ones. This makes it increasingly likely that regime conflicts end in favor of democracy and in disfavor of autocracies once emancipative values have become sufficiently widespread.

By the same token, however, democracy remains a fragile achievement that is in danger of backsliding where emancipative values are weak.
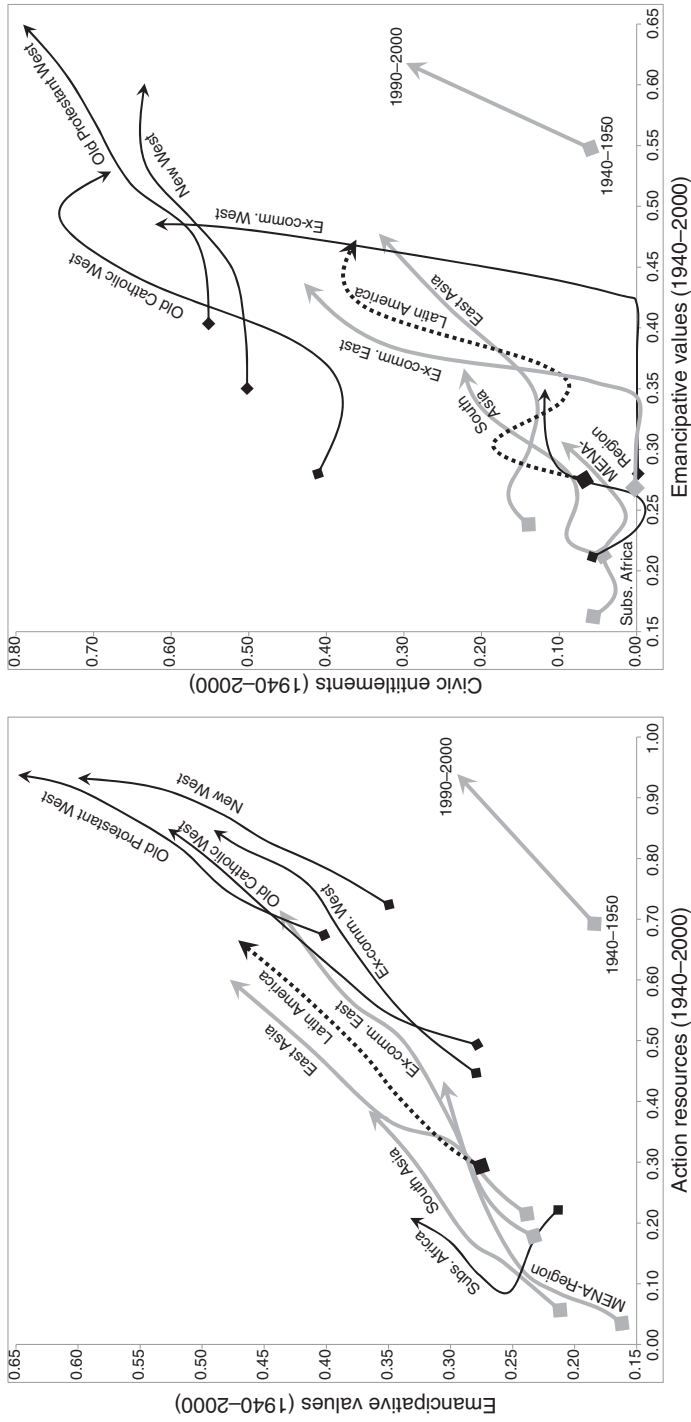
Figure 2 Societal progress as human emancipation. *Source:* Reprint of Figure 4.5 in Welzel (2013, p. 160), by permission of the author, see: www.cambridge.org/9781107664838.

Sharp inner-societal divisions over people's access to action resources and the life opportunities attached to these resources constitute the single-most important cause behind the parochialisms embedded in familism, religiosity, and nationalism that block emancipative values.

These insights provide good reasons to consider emancipative values as a study object of foremost importance if we are to understand the cultural foundations of democracy. Future research would be well advised to measure emancipative values in more nuanced ways and to study in greater detail these values' drivers and the dynamics by which they transgress cultural boundaries or stop short of them. A promising new route of research includes survey experiments, using exposure to authoritarian indoctrinations as a randomized treatment, to figure out how strongly people's resistance against such manipulations depends on their adherence to emancipative values and to see how value-induced resistance strength interacts with personality traits and the overall prevalence of emancipative values in a person's reference group.

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Member of the *German Academy of Sciences*, **Christian Welzel** (cwelzel@gmail.com) is the political culture research professor at Leuphana University in Lunenburg, Germany. He is also president (emer.) and vice president of the World Values Survey Association and chief foreign director of the Laboratory for Comparative Social Research (LCSR) at the National Research University-Higher School of Economics in St. Petersburg and Moscow, Russia. Welzel's research focuses on human empowerment, emancipative values, cultural change, and democratization. Recipient of multiple large-scale grants, Welzel is the author of more than a hundred-and-fifty scholarly publications. Besides his award-winning *Freedom Rising* (2013 at CUP, winner of the *Alexander George Award* and the *Stein Rokkan Prize*), the most recent books include *Democratization* (with Christian Haerpfer, Ronald Inglehart and Patrick Bernhagen, 2nd fully revised and updated edition at OUP 2018), *The Civic Culture Transformed* (with Russell J. Dalton, at CUP 2014); and *Modernization, Cultural Change, and Democracy* (with Ronald Inglehart, 2005 at CUP). Funded by the German Science Foundation's *Reinhart Koselleck Award*, Welzel currently directs research on the project "The Cool Water Effect: The Geo-Climatic Origin of Western Civilization's Emancipatory Dynamic."

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