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Paper No. 26



Mainz Papers on International and European Politics (MPIEP)

ISSN: 2193-6684

Edited by the Chair of International Relations, University of Mainz

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Speyer, Johanna (2022): Backlash: Unpacking the Concept's Analytical Promise. Mainz Papers on International and European Politics, No. 26. Mainz: Chair of International Relations, Johannes Gutenberg University.

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Backlash: Unpacking the Concept's Analytical Promise

Johanna Speyer

Abstract

The increasing contestation of the liberal international order presents a daunting challenge both to practitioners and academics, within all sub-fields of political science and beyond. In these debates, backlash has become a new buzzword. Yet, its definition remains contested, which not only hampers the concept's analytical power, but limits our understanding of the respective resistances, taking place on a national as well as international stage. Recently, Karen Alter and Michael Zürn have addressed this shortcoming. They define backlash as resistance against policies comprising (1) a retrograde objective, (2) extraordinary goals and tactics and (3) a threshold condition of entering mainstream public discourse. Yet, the concept of backlash arrived at thus proves hardly distinguishable from known concepts of resistance, particularly norm contestation. Based on a cross-disciplinary review of both the variegated use of the term backlash in colloquial and scientific language and established theoretical approaches to resistance in international relations, I develop a conceptualisation of backlash which highlights its specificities: backlash is an in-group resistance against institutions and their fundamental norms. This innovative understanding of backlash, based on institutionalist theory and constructivist norms research, opens up new angles for understanding the phenomenon, particularly its causes.

Keywords: backlash, contestation, institutionalism, norm theory, resistance, conceptualisation.

1. Introduction

Both on the national and international scale, we are witnessing an increasing wave of radicalized contestations of established norms and institutions. This resistance, which bedevils very disparate polities as well as trusted forms of coexistence and cooperation, presents a puzzling challenges to economists, lawyers and social scientists alike. These upheavals have even spurred discussions about a crisis of the liberal international order (Ikenberry 2018; Keohane 2021; Lake et al. 2021; Zürn 2018). Such alarming analyses underline the urgent need for academics to understand these phenomena, as well as their causes, consequences or potential remedies.

In colloquial just as in academic language, the present challenges are often labelled as backlash. Yet, there is hardly a common core to this concept. It may denote anything from “recoil” (Madsen et al. 2018: 199) to “a diffuse sense of crisis in [...] the international system of governance” (Deitelhoff 2020: 715–727). It describes states’ actions in opposition to international treaties or social movements’ rejection of domestic societal changes (Caron and Shirlow 2016). Thus, backlash seems to denote a large variety of disagreements (Soley and Steininger 2018: 238), especially when they are seen as exceptionally consequential or anti-liberal (Madsen et al. 2018: 199).

This plasticity is simultaneously promising and disconcerting. It underlines that backlash spans a variety of disciplines in the social sciences and beyond. Hence, the concept has the extraordinary potential to perform as a prism, which integrates hitherto largely separate theoretical and disciplinary approaches. Yet, the lack of a clear scientific conceptualisation of backlash has, to this day, largely inhibited the unfolding of this potential. The analytic leverage of the concept depends on a definition of backlash as a unique phenomenon (see for example Abbott et al. 2000; Alter and Zürn 2020a: 564). Social science urgently needs to answer the question “What is backlash?”

Karen Alter and Michael Zürn (2020a, 2020b) have taken up this challenge. They endeavour to conceptualise backlash and to develop a “proto-theory”, which focuses primarily on the possible consequences of backlash.¹ Their reasoning is based on an impressively broad range of articles brought together in their special issue on “Backlash politics in comparison” (*British Journal of Politics and International Relations* 22:4, 2020). These contributions apply Alter and Zürn’s concept of backlash in a wide variety of contexts, ranging from societal conflicts over gay rights (Encarnación 2020) and feminism (Cupać and Ebetürk 2020) to state resistance against European Integration (Kriesi 2020) or the International Criminal Court (ICC) (Deitelhoff 2020).

Alter and Zürn (2020a: 565–570) define backlash as comprising three necessary elements and three frequent companions. Backlash is an interactive political process (1) pursuing a retrograde objective with the help of (2) extraordinary means that (3) passes the threshold of inclusion into the public discourse. Furthermore, backlash is frequently accompanied by (a) emotive appeals and nostalgia, (b) taboo-breaking strategies and (c) institutional reshaping. This definition pays tribute to the variety of contexts in which backlash may occur. It can be applied to different actors and subjects and thereby can travel across disciplines and levels of analysis. Hence, this concept of backlash, just as the multidisciplinary set-up of the special issue edited by Alter and Zürn, underlines the importance and the promise of the concept for the social sciences.

Yet, according to this concept, backlash is no unique phenomenon. It is hardly distinguishable from trusted concepts of resistance such as dissidence, revolution and norm contestation (Deitelhoff 2020: 723–724). I argue that this hinges particularly on the object of critique and the normative orientation posited by Alter and Zürn’s definition. They understand backlash as resistance against policies, rather than polities. Moreover, the authors reject a normative connotation of backlash, but stress that backlash always pursues a retrograde goal. Conversely, I maintain that backlash cannot be a

¹ Alter and Zürn mainly speak of “backlash politics”. However, they seem to use this concept interchangeably with “backlash”. Furthermore, as I argue in this article, backlash, as an act of resistance, is inherently political. Therefore, I use the term “backlash” in this article also for my review of Alter and Zürn’s reasoning. This has the further merit of allowing an easier interdisciplinary conversation within the emerging literature on backlash.

mere rejection of policies, but always concerns formal and informal institutions as well as the fundamental norms on which they rest. Furthermore, while I follow the authors in dismissing the normative bias inherent in understanding backlash as a regressive phenomenon, I argue that backlash's exceptionality stems from it being a form of in-group resistance, meaning resistance against the own norms and institutions from amid the members of a normative order.

I base this redefinition in established theories of resistance, namely institutional contestation and norm contestation. In this innovative and integrative theoretical perspective, backlash emerges as a phenomenon uniting the different logics of actions of these two concepts of resistance, which are rooted in institutionalism and social constructivism respectively: backlash is both a behavioural practice captured under the broad notion of 'exit' by the literature on institutional contestation and a discursive practice, as actors contest the validity of fundamental norms.

Due to the limited scope of this article, I will largely confine myself to the conceptualisation of backlash, as a prerequisite to theorising causes and consequences. First, a concise overview of different academic and colloquial understandings of backlash reveals that they merely concur in identifying instances of extraordinary resistance as backlash but diverge fundamentally on the central components of the definition: actors, the object of critique, the process of backlash, its effects and its normative orientation. By presenting Alter and Zürn's (2020a, 2020b) definition according to these elements, I identify three aspects where their definition falls short of establishing the extraordinary nature of backlash. These are (1) the object of critique at stake in backlash, (2) the process of backlash as well as (3) its normative orientation. Based on these three aspects, I posit a novel conceptualisation of backlash which is rooted in institutionalist theory and constructivist norms research. I conclude by discussing how this conceptualisation advances the pioneering work of Alter and Zürn and reflect on open questions for a new research agenda on backlash.

2. Overcoming the Plasticity of Backlash

2.1 Overview of the Use of the Concept

The confused denomination of empirical phenomena as backlash can broadly be clustered into three different categories, which underline the importance of the concept across and beyond sub-disciplines of political science. Backlash denotes (1) domestic resistance of social movements against political/societal changes, (2) the actions of transnational protest movements or (3) state resistance against and exit from international institutions.

- (1) *Domestic resistance by social movements*: Social movement research defines backlash as an action by, and sometimes against, social movements on a domestic level (Alter and Zürn 2020a: 5). Mostly, backlash is seen as a conservative reaction to liberal societal or political changes. Lately, backlash is used to describe (right-wing) populist movements in democratic states (e.g. Inglehart and Norris 2016; Kriesi 2020; Landwehr 2020). These movements stand out as they contest polity as well as policy (Landwehr 2020). Examples of such backlash are many and include the presidency of Jair Bolsonaro in Brazil (Hunter and Power 2019; Sandy 2018) or the developments in Hungary and Poland under the governments of Victor Orbán and the Law and Justice party (PiS) respectively (Kriesi 2020; Rupnik 2007, 2012).
- (2) *Transnational protest movements*: National populist movements in different countries often share interests. Consequently, they constitute transnational movements of "older white men with traditional values" (Inglehart and Norris 2016: 5) who lash back against globalisation (Kriesi 2020: 694; Mudde and Rovira Kaltwasser 2018: 11–12). Conversely, leftist protests against globalisation's neoliberal features, such as the emblematic "battle of Seattle", have also been labelled as backlash (Graham 2001).
- (3) *State resistance against international norms and/or institutions*: Recently, backlash is especially invoked in discussions about a crisis of the liberal international order, as apparent in states' resistance against international organisations and international courts (Börzel and Zürn 2021;

Ikenberry 2018; Keohane 2021; Lake et al. 2021; Zürn 2018). Institutions ranging from the World Trade Organisation (WTO) (Hirschmann 2020: 75) over the EU (Alter 2000) to the ICC or regional courts (Alter et al. 2016; Deitelhoff 2020; Madsen et al. 2018; Soley and Steininger 2018) are confronted with such challenges, which sometimes culminate in a state's exit from the respective institution. By contrast, Carothers (2006), Snyder (2020) or Lake (1994) use the concept to refer to state resistance against liberal norms, which are perceived as Western impositions.

The only common denominator of these diverging understandings is that backlash always means an exceptional kind of resistance. Therefore, this notion of exceptionality must underly any conceptualisation of backlash. Beyond this, the concept of backlash will only have analytical worth if it is different from forms of resistance that have already been fruitfully theorised in the social sciences in general and political science in particular (Deitelhoff 2020: 9–10). In fact, resistance is a normal feature of the political process (Börzel and Risse 2018: 12). Hence, it is unsurprising that with concepts and distinctions such as opposition and dissidence (Daase and Deitelhoff 2018), institutional contestation (e.g. Morse and Keohane 2014), norm contestation (e.g. Wiener 2014) or politicisation (e.g. Hutter et al. 2016), political scientists have already established many concepts of resistance.

Yet, whence this lingering exceptionality of backlash stems remains contested. It is variably located in the five definitional characteristics of the phenomenon. Firstly, regarding actors, social movements and states seem to be most suspect of practicing backlash. Yet, the literature also suggests a possible role for parties, individual leaders and epistemic communities (see for example Kriesi 2020; Madsen et al. 2018). Secondly, backlash's object of critique is defined very differently and ranges from a specific policy to "the system as a whole" (Caron and Shirlow 2016). Thirdly, the process is sometimes defined by a specific kind of action, such as coercive means (for example Mansbridge and Shames 2008). Fourthly, is backlash characterised by a certain outcome or effect? Finally, there is a need to clarify the normative orientation of backlash. I will now summarize Alter and Zürn's definition of backlash along these five dimensions. This reveals both the merits and shortcomings of the definition, based on which I develop my conceptualisation.

2.2 Backlash Politics according to Karen Alter and Michael Zürn

Backlash, according to Karen Alter and Michael Zürn (2020a: 579–580) is "a particular form of political contestation with a retrograde objective as well as extraordinary goals and tactics, which has reached the threshold level of entering public discourse". Besides, they identify "frequent companions: emotional appeals, nostalgia, taboo breaking practices, and institutional reshaping" (Alter and Zürn 2020a: 580). I will now segregate this definition into the five central characteristics, which trace the concept's boundaries.

Actors: At first glance, the above definition is largely silent on who practices backlash. Here, it is indicative to look at the examples for backlash that the authors identify. They name the US' "Temperance Movement" in the 19th century, the mobilisation against "Obamacare" and gay marriage, the Islamic State (ISIL), White Supremacy movements, Radical-Right-Wing parties in Europe, the Chinese Boxer uprising and Cultural Revolution as well as National Socialism in Germany in the 1930s (Alter and Zürn 2020a: 571).

This list of considerably disparate movements nevertheless suggests that Alter and Zürn mainly see social movements as perpetrators of backlash. These may be domestic (the movements against Obamacare or gay marriage in the US) or transnational (the Islamic State), may base themselves in a particular religion (temperance movement, ISIL) or be more inclusive as to religious or ideological background (resistance to "Obamacare"). They may be political parties. Besides, they differ considerably as to their degree of organisation, their longuevit  and the breadth of the social changes that they pursue. This definition recalls social movement research, which points to the broad category of social movements as the initiators of backlash (Alter and Zürn 2020b: 5). Hence, Alter and Zürn (2020a: 572) coin the concept of "backlash movements", which they consider to be "omnipresent features of politics".

Importantly, we can distil that backlash can only be practiced by collective actors. This seems plausible as backlash is generally considered as a large and important form of resistance. Alter and Zürn (2020a: 580) even demand that backlash must reach a “threshold level of entering public discourse”. While the precise nature of this threshold remains unclear, demands voiced and pursued by a single individual could not qualify as passing such a threshold. Besides, understanding backlash as a practice of collective actors is compatible with other scholars’ suggestions that backlash can be driven by epistemic communities, economic actors, branches of government or the state (for example Inglehart and Norris 2016; Madsen et al. 2018: 204).

A backlash movement is ultimately defined by the retrograde goal it pursues (Alter and Zürn 2020a: 567). This desire to reinstate a past state of affairs will be further discussed in relation to backlash’s object of critique in the next paragraphs. Yet, Alter and Zürn oppose the idea that backlashing actors are always motivated by a (perceived) loss of power (Madsen et al. 2018: 200; Mansbridge and Shames 2008: 626) and the consequent desire to reinstate “part of or all the former power” (Mansbridge and Shames, 2008: 627).

Thus, we can conclude that Alter and Zürn see collective actors, more precisely backlash movements, as the perpetrators of backlash. These may differ widely in relation to the political sphere in which they act, as well as to their (non-)religious background and their inclusivity. However, they always pursue a retrograde goal.

Object of critique: Alter and Zürn (2020a: 566–577) see backlash as chiefly directed against policies. In applying the understanding to right-wing populist parties in Europe, Landwehr (2020: 602) grants that this policy resistance may reach out to a polity. Yet, she argues in line with the concept she applies that eventual backlash against a polity is merely instrumental to reaching a substantive retrograde goal. Likewise, Alter and Zürn (2020a: 566–567) state that “backlash movements often challenge not only policies but also shared principles, goals, procedures, and practices within which political processes and the exercise of political authority occurs”. Thus, while the authors do not exclude the resistance against polities from the phenomenon of backlash, they advance policy resistance as a necessary element of backlash, whereas resistance against a polity seems to be a possible, additional feature or even a mere means to achieve the retrograde goal with regard to a policy.

Yet, when understood (primarily) as resistance against a certain policy, backlash is no distinctive concept of resistance. Firstly, the assumption that backlash, practiced against a policy, may or may not concern the polity, and that policy remains central, throws together very different practices of critique, which are extremely different as to their possible consequences. Whereas policies generally concern a closely circumscribed aspect of life, the polity describes the underlying institutional structure, which organises the coexistence, cooperation and decision-making in a society or community. The polity determines how a certain policy comes about in the first place. Consequently, summarizing the resistance against such a polity and the simple resistance against a certain policy under the same label confuses the meaning of backlash.

Secondly, disagreements about a certain policy are a day-to-day feature of politics. Especially in democratic political systems, such disagreements are voiced by the opposition, inside and outside parliament. Certainly, such protest may sometimes not respect the rules of the state’s polity. To distinguish between compliant and more radical resistance, Daase and Deitelhoff (2018) have suggested the concepts of opposition and dissidence.

Thirdly, backlash becomes indistinguishable from norm contestation if primarily understood as policy resistance. Norms are always two-pronged entities in that they determine the normal and the normative: a norm is “a standard of appropriate behavior for actors with a given identity” (Finnemore and Sikkink 1998: 891). Norm contestation encompasses “social practices, which discursively express disapproval of norms” (Wiener 2014: 1). Hence, “[...] political backlash [in Alter and Zürn’s definition; J.S.] can be understood as a sub-type of contestation that is extraordinary in its claims and focused on reverting to a prior social condition”. Yet, “backlash and contestation are hard to distinguish empirically” (Deitelhoff 2020: 718). In spite of this close similarity and the prolific research agenda on

norm contestation (see only Deitelhoff and Zimmermann 2020; Hoffmann 2010; Wiener 2014), norm contestation is not debated in Alter and Zürn's conceptualisation and theorisation of backlash.

In parallel to other modes of resistance, it makes sense to distinguish acts of norm contestation according to how encompassing the critique of a norm is. Deitelhoff and Zimmermann (2019, 2020) show that contestation dynamics and their effects on norm robustness differ according to whether the interpretation of a norm in a specific situation (applicatory contestation) or the very validity of a norm (validity contestation) is questioned. In validity contestation, actors "challeng[e] broadly shared notions of what constitutes a better world and how this better world is achieved and sustained", something that Alter and Zürn (2020a: 567) assume backlash movements to do. Accordingly, I argue below that validity contestation of fundamental norms is a crucial component of backlash.

Aside from the object of critique being a policy, Alter and Zürn posit that backlash always counts with a retrograde objective. As the authors rightly observe: "[w]ithout the retrograde directionality, backlash politics would be indistinguishable from a lot of social movement initiated contentious politics" (Alter and Zürn 2020b: 742). While conceiving of backlash as inherently retrograde remains true to the literal meaning of the word, locating the exceptionality of backlash almost exclusively in this directionality does not do justice to backlash. If this were the central distinguishing characteristic, backlash would not be a categorically distinct form of resistance, but merely differ by degree from known forms of resistance, particularly norm contestation (Deitelhoff 2020: 723–724). Additionally, the mere fact of a retrograde objective carries little theoretically relevant information, so the value added of such a conception of backlash is doubtful.

We can thus conclude that Alter and Zürn assume backlash to be primarily directed against a policy in pursuance of a retrograde objective. However, this understanding fails to establish backlash as a theoretically distinct phenomenon, especially against the backdrop of norms research and institutional contestation.

Process: Backlash, according to Karen Alter and Michael Zürn (2020a: 566), is defined by extraordinary means, that is, means that "challeng[e] dominant scripts". Although this does not necessarily imply the use of coercive power, such as the threat of sanctions or even the use of violence (Alter and Zürn 2020a, note 7), the precise nature of these means remains unclear. For instance, is backlash primarily characterised by a discursive rejection of the policy under critique (such as in norm contestation) or does backlash necessarily involve a certain behaviour, such as exit (as argued by Soley and Steininger 2018). Thus, along the seminal distinction of protest and disagreement as either "Voice" or "Exit" (Hirschman 1970), backlash, as conceptualised by Alter and Zürn, eschews categorisation.

Beyond the unclear nature of the "extraordinary means", the authors stress that backlash is an interactive phenomenon. Backlash processes evolve over time in response to the actions of others vis-à-vis the resistance. In line with norm contestation research (e.g., Deitelhoff and Zimmermann 2020; Speyer 2018; Wiener 2014), Alter and Zürn (2020a: 672–673) describe backlash as a process of resistance, which may escalate through interaction. At the heart of their theorisation, the authors present a sophisticated model of how the reactions to backlash can shape the process of backlash and especially its outcomes (Alter and Zürn 2020b: 749). The authors stress in particular that the answers to backlash may enhance the "frequent companions" of backlash: nostalgia and emotional appeals, taboo-breaking and institutional reshaping (Alter and Zürn 2020a: 668–670). Here again, the close similarity of the evolution of backlash to the dynamics of norm contestation suggests that the two forms of resistance need to be distinguished carefully lest backlash describe a mere sub-type of norm contestation.

I conclude that Karen Alter and Michael Zürn conceive of backlash as a process, not a one-off action. This action is defined by measures, which challenge dominant scripts and whose radicalisation and consequential nature can be ascertained by analysing the intensity of its "frequent companions". This intensity, as well as the effect of a process of backlash, depend on the reaction of other actors.

Effect: Alter and Zürn (2020a: 574) explain "[o]ur backlash politics definition does not include the success of the backlash movement in the sense of achieving its policy or polity goals". But "since

counter-mobilisations and counterstrategies can defuse backlash movements, there is no reason *per se* to presume that the causes and triggers [of backlash] will be directly related to the consequences [of backlash]”. Backlash, the authors argue, may entail (a) no change to policy and polity alike, (b) fundamental change to policy or polity, including the lasting creation of new social cleavages, or even (c) social reversion, entailing a fundamental reconstitution of the polity. Especially in these latter scenarios, initially domestic or geographically confined backlash processes may develop international contagion (Alter and Zürn 2020a: 574–575).

Consequently, while the authors acknowledge the possibly detrimental effects of backlash, they nevertheless separate the consequences of backlash from its definition. This is crucially important, as a definition comprising characteristics and consequences conflates cause and effect (Abbott et al. 2000: 402).² Backlash as a process is independent of its eventual outcome. Still, the authors rightly stress that, given the potentially far-reaching effects of backlash, social science urgently needs to turn to the phenomenon and to theorise why a certain process of backlash leads to a certain outcome (Alter and Zürn 2020a: 575).

Normative Orientation: Against the widespread connotation of backlash as anti-liberal and regressive, Karen Alter and Michael Zürn (2020a: 665, 2020b: 740–743) posit a normatively neutral concept of backlash: backlash movements always pursue a retrograde objective, but this retrograde objective is not necessarily regressive. They defend this normatively neutral definition on three grounds (Alter and Zürn 2020b: 741–742). Firstly, they argue that a definition without normative baggage is of greater analytical value. Secondly, the authors stress that the normative judgement on a certain goal will vary according to the normative persuasion of the person who judges. Furthermore, they emphasise Nicole Deitelhoff’s (2020: 727) observation that an action that appears regressive in the sense of limiting individual rights might yet turn out to have a positive effect on these very rights in the longer term. Lastly, they add that “the regressive label obscures that backlash politics are themselves a contestation about the definition of what is progressive for a particular group or society”.

This reasoning is highly persuasive. From an analytical point of view, tying backlash to a certain normative orientation would unduly limit the applicability of the concept and lead to normatively biased investigations.³ Yet, the authors weaken their bold positioning with three unfortunate moves. First, they concede that “normative judgements must be part of studying backlash politics” (Alter and Zürn 2020b: 741). Nonetheless, the advantages of including such a normative perspective remain unclear (Alter and Zürn 2020b: 751). As a form of resistance, which involves norms, backlash is automatically a normative practice. Yet, I suggest that both the discriminating power and the analytical value of the concept can be increased by locating its normative characteristic in the relationship between the backlashing actor and the object of critique, rather than measuring it against a normative standard, which is external to the concept itself.

Second, the normatively agnostic nature of Alter and Zürn’s backlash concept is questioned by its definition itself. The authors demand that backlash claims must pass a threshold condition of entering public discourse. This, however, requires an at least partially open public space (Alter and Zürn 2020a: 567–568). Yet, how open does a public space need to be so as to allow for backlash? This assumption seems to reintroduce a normative positioning.

Lastly, the authors insist that a retrograde objective, meaning the desire to return to a previous state of social affairs, is not necessarily regressive. Still, the opposite seems to be true for their examples of backlash. The objectives pursued by these movements are invariably regressive from a liberal standpoint, but their retrograde nature is not always obvious. For example, mobilisations against “Obamacare” in the US or gay marriage in many Western democracies are arguably opposed

² Indeed, by assuming that institutional reshaping is a frequent companion of backlash rather than a possible effect, the danger of collapsing causes onto effects remains.

³ This insight recalls the “nice norms bias” by which academics criticised the “teleological flavour” (McKeown 2009: 7) of a norms research centred on “good”, that is liberal and progressive norms (Finnemore and Sikkink 2001: 403–404; McKeown 2009: 7–8).

to a further liberalisation of gay rights or involvement of the state in health insurance. They do not, however, invariably advocate the reversal of the achievements in anti-discrimination legislation.⁴ Metaphorically speaking, these actors merely wanted to stop where they stood, rather than advance towards further liberalisation. Still, if backlash is defined (inter alia) by its retrograde objective, this resistance to further liberalisation does not qualify as such. The very examples given for backlash therefore question whether retrograde and regressive can be distinguished as neatly as the authors propose.

The backlash definition by Alter and Zürn stands out by its ability to travel between different times, geographical contexts and political spheres. This is a considerable asset and does justice to the interdisciplinary promise of the concept. Yet, while this connectivity of backlash must be a central characteristic of the concept, the above review has revealed the weaknesses of the definition by Alter and Zürn. Taken together, they entail that backlash appears as a redundant term for resistance dynamics that can be captured by trusted concepts such as dissidence, different modes of institutional contestation and, most particularly, norm contestation. In the next section, I will reconsider the object of critique, the process and the normative orientation of backlash in turn and propose a redefinition of these characteristics with the aim of establishing backlash as an analytically distinct concept. Such a concept of backlash promises to be a fruitful basis for a much-needed research agenda.

3. Conceptualising Backlash

3.1 Object of Critique

If backlash is understood chiefly as resistance against a specific policy, it becomes indistinguishable from usual opposition and contentious politics as well as norm contestation. The various uses of backlash that I have reviewed above suggest that backlash is directed against an institution and a polity, rather than a certain policy. Against this backdrop, Deitelhoff asks, whether the concept of backlash should be limited to systemic challenges “that aim at changing the institutional order or its normative fabric at a whole” (Deitelhoff 2020: 725).

Indeed, this suggestion fulfils the double purpose of establishing backlash as exceptional and as a distinctive phenomenon of resistance. Simultaneously, I argue that to unfold its analytical potential, the concept of backlash needs to be grounded in established theories of resistance. Here, the reflections so far suggest that norm contestation and institutional contestation, two metatheoretically distinct, but equally dynamic strands of research, can be helpful.

Institutions have long been at the heart of much IR theorizing (see, for example Keohane 1984; Martin and Simmons 1998, 2012). In the last decade, the disintegration and contestation of institutions has received particular attention (for example Debre and Dijkstra 2020; Hirschmann 2020; Morse and Keohane 2014; Zürn 2018). Institutional contestation, which may take the form of opt-outs, state exit, forum shopping or counter-institutionalisation, is mostly seen to be triggered by causes external to the institution itself.

Formal or informal and national as well as international institutions rest on their own fundamental norms. These norms are foundational to the institution and define basic characteristics of the community of actors, who form part of the institution.⁵ Still, the literature on institutional contestation has rarely attempted to disentangle norms and institutions (Morse and Keohane 2014: 387). Yet, it is apparent that the contestation of an institution may well stay aloof of questioning the basic rules of a society or community. At the same time, the contestation becomes more holistic if it encompasses both the institution and its fundamental norms.

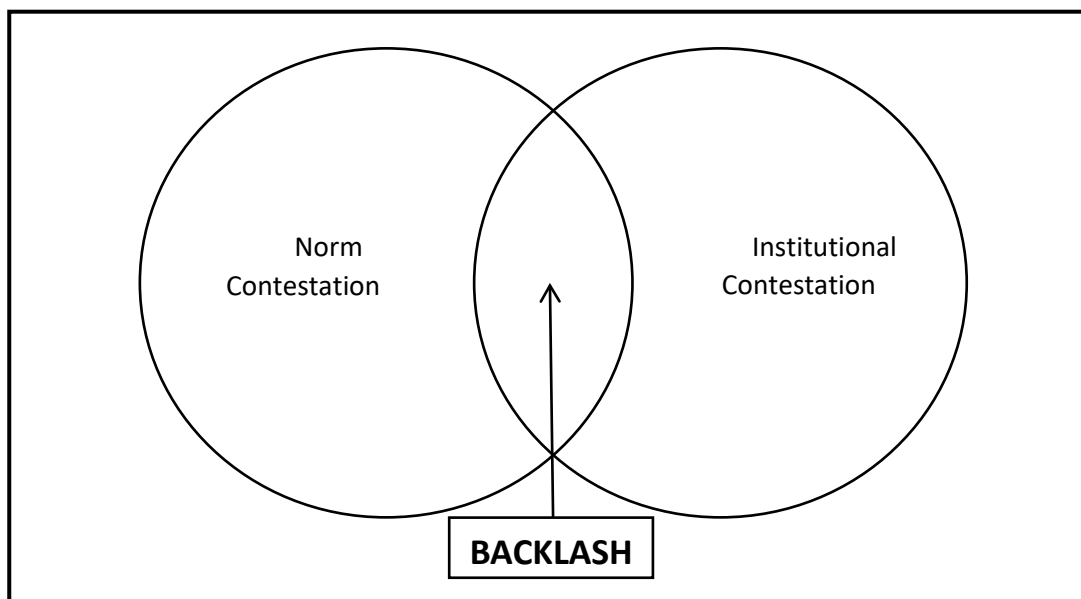
⁴ See, for example, the debate on the legalisation of same-sex marriage in the German parliament: <https://dserver.bundestag.de/btp/18/18244.pdf>

⁵ On the international level, a good example for such fundamental norms is Art. 2 Treaty of the European Union (TEU), which stipulates, inter alia, that the rule of law and democracy are foundational values of the institution and common to the EU member states.

With regard to norm contestation, Deitelhoff and Zimmermann (2020) have suggested to distinguish between applicatory and validity contestation, depending on whether the interpretation of a norm in a specific situation or the norm as such is questioned. If backlashing actors contest “what is progressive for a particular group or society” (Alter and Zürn 2020b: 742), they are obviously contesting the validity of these fundamental norms. Thereby, validity contestation goes beyond the normative structure to attack the institutional structure of a domestic, regional or international order (see also Niemann and Schillinger 2017).

Thus, based on the elaborated theoretical approaches to norm contestation and institutional contestation, I determine that the concept of backlash is not reducible to either of these modes of resistance. Rather, the exceptional character of backlash is based in the fact that backlash is simultaneously the contestation of an institution and the validity of this institution’s fundamental norms. Backlash is then to be located at the intersection of these two theoretical approaches (see Figure 1). Consequently, the object of critique in backlash is twofold: backlash is directed both against an institution and the fundamental norms on which the institution rests.⁶ Put simply, backlash always attacks a polity (which incorporates a normative and an institutional expression), not a mere policy (which could face norm contestation) or the material structure of an institution (possibly subject to institutional contestation). As a consequence, backlash is not merely a sub-type of validity contestation (contrary: Deitelhoff 2020: 718).

Figure 1: Venn diagram of backlash as located at the intersection of institutional contestation and norm contestation



Understood thus, the concept of backlash is rooted in institutionalist theory as well as constructivist norm theory. This has important implications for the modes of action necessary for a process of backlash, but also serves as an illustration of the integrative potential that the concept of backlash brings to the social sciences.

3.2 Process

⁶ For a similar reasoning, see Madsen et al. (2018) and Soley/Steininger (2018), who distinguish between the resistance against a specific judgement (pushback) and an international court as such (backlash).

Anchoring backlash in institutional contestation and norm contestation provides a theoretical basis for the concept, which remains unclear in the conceptualisation by Alter and Zürn. Besides, this insight allows for crucial discoveries about the process of backlash. Institutionalism, particularly rational choice institutionalism, is based on a materialist ontology (Fioretos et al. 2016: 7). Therefore, institutional contestation is always a certain kind of behaviour: non-compliance, regime shifting, counter-institutionalisation or exit (for example Alter and Meunier 2006; Hirschmann 2020; Morse and Keohane 2014). Even the literature on contested global governance, which contemplates non-material causes for institutional contestation, assumes that states express their disapproval through exit or counter-institutionalisation (Zürn 2018).

Conversely, true to the constructivist origins of the theory, norm contestation refers to the critical discursive engagement with a norm. In fact, mere non-compliance is inconclusive given that “[a]s deontological entities, norms derive their validity primarily from the shared intersubjective acceptance of their obligatory claims by their addressees and, only secondarily, from their factual enforcement” (Deitelhoff and Zimmermann 2020: 53). For validity contestation, arguably the most radical form of norm contestation, this discourse needs to fulfil three characteristics.⁷ It (1) is independent of a specific situation and a particular interpretation of the norm, (2) questions the source of a norm’s validity claim, by attacking the cultural values, reasoned consensus or common (informal) institutions on which a norm’s validity rests and (3) is cast as emancipatory or anti-universalist, depicting the opposition to the norm as an essential fight against foreign domination (see Deitelhoff and Zimmermann 2020).⁸

Backlash therefore emerges as a two-pronged practice: collective actors simultaneously engage in behavioural contestation of an institution and discursive contestation of a certain norm. Here again, backlash reveals its exceptionality and its integrative potential: It is exceptional as it requires the simultaneous engagement in contesting behaviour and discursive contestation. Thereby, the concept integrates material and non-material ontologies.

In line with Karen Alter and Michael Zürn (2020a: 567–568), I conclude that backlash does not necessarily involve coercive means. Likewise, I follow their reasoning that backlash cannot be defined by its outcome. Clearly, backlash, understood as the rejection of an institution and its fundamental norms, could have far-reaching consequences. Still, including such consequences into the conceptualisation in the first place would unduly limit the concept and inhibit any investigation into which characteristics of an instance of backlash cause a certain outcome.

Lastly, I agree that backlash is a process, which is influenced by the reaction of others. For both institutional and norm contestation, it has been established convincingly that the reaction of other member states or norm supporting actors is very consequential (e.g., Debre and Dijkstra 2020; Deitelhoff and Zimmermann 2020; Speyer 2018). Nevertheless, in line with the above reflections on backlash’s consequences, such reactions are not themselves part of the concept of backlash. They are triggered by backlash and may have important repercussions on the evolution of a backlash process and its eventual outcome. Hence, their investigation seems a crucial task for a research agenda on backlash, for which this conceptualisation exercise aims to provide a fruitful groundwork.⁹

3.3 Normative Orientation

Aware that colloquial understandings are often too confused to serve an analytical purpose (Swedberg 2018: 184), Alter and Zürn (2020a: 566) have suggested stripping away the common anti-liberal connotation of backlash and posit that backlash always involves a retrograde, though not regressive, goal. Against this, Deitelhoff (2020: 718, 723-724) argues that backlash can only be distinguished from

⁷ Deitelhoff and Zimmermann (2020) identify the contestation of the whaling moratorium as validity contestation.

⁸ Such a discourse will likely involve emotional appeals and taboo-breaking, which Alter and Zürn (2020a: 668–669) assume to be frequent companions of backlash.

⁹ These feedback effects could be modelled with the help of the concept of reactive sequences as developed by Historical Institutionalism (Fioretos et al. 2016: 12).

known forms of contestation if the normative orientation is retained as a central defining characteristic.

Departing from these debates, I have suggested that backlash is the simultaneous behavioural contestation of an institution and discursive contestation of the validity of the fundamental norms underlying this institution. Thus, backlash describes a new category of resistance, rather than a specific kind of known forms of contestation. Besides, to unfold its analytical leverage, backlash should indeed be unincumbered by normative judgements. Reserving the concept for resistance with a very particular political orientation would force the researcher to make a problematic and contestable normative assessment and risks to conflate research and political activism. Moreover, such an understanding unduly narrows the scientific gaze to cases of backlash inside liberal communities where a comparison across liberal and illiberal orientations may be highly instructive.

To be sure, validity contestation is always a highly normative practice as it involves the encompassing rejection of the validity of a norm. This is even more acute if fundamental norms of an institution, that is, those norms, which govern basic orientations and procedures of a certain society or group of states, are in jeopardy. Backlash inexorably upsets the normative conviction embodied in the fundamental norm and institution under attack. Thus, while I do not agree that “normative judgements must be part of studying backlash politics” (Alter and Zürn 2020b: 741), I argue that the normative context in which backlash takes place is decisive, as it underlines the concept’s exceptionality.

Resistance against norms and institutions is to be expected where these are perceived as alien impositions. Martin and Simmons (1998: 755) maintain that states are likely to create and abide by institutions of their own normative convictions and that, therefore, resistance of illiberal actors against a liberal institution should be expected. Similarly, Keohane and Morse (2016: 346–347) see such ideological conflict as a possible cause for regime shifting and competitive regime creation. Norm researchers have argued that norm contestation will grow where actors are subjected to a norm without having participated in the norm’s creation or interpretation (Deitelhoff and Zimmermann 2020; Speyer 2018).

It follows that asymmetric resistance is to be expected to a certain degree and has accordingly been studied. Yet, as evidenced for example in the backlash of Hungary and Poland against European Integration (for example Kriesi 2020), what is puzzling about the recent wave of resistance denominated as backlash is that we see in-group resistance: Collective actors reject the normative and institutional framework, which embodies their own normative convictions and which they have either helped to create or worked hard to join.

Consequently, the exceptional and singular character of backlash also hinges on its normative orientation. I propose to limit backlash to this form of symmetrical resistance within an in-group marked by a common normative persuasion. Thus, backlash can happen inside a liberal or non-liberal context. If, however, actors push back against norms and institutions, which are alien to them, they do not practice backlash.¹⁰ Table 1 below summarises these types of resistance.

¹⁰ I conceive of collective actors as part of the in-group if they are either a founding member of the normative order or have made significant efforts to join the normative order in question. Even though membership in the liberal normative order is likely linked to benefits for a state concerned, it is important that the state has joined the liberal normative and institutional order voluntarily and was not forced to do so by other actors. However, I concede that this definition becomes less clear when applied to organisations with a world-encompassing claim, such as the United Nations, or states, who have moved to the periphery of an institutional order. An interesting case in point is Turkey who, as one of the founding members of the Council of Europe (CoE) and a long-term accession candidate to the EU, aspired to join a liberal in-group but has increasingly backtracked from this position and is currently defying judgements of the European Court of Human Rights. Concerning this case, my definition firstly encourages a segmentalized view of “the liberal order”, whereby in-groups are defined not only along the norms that they adhere to but also circumscribed by an (with regard to states mostly formal) institution, in this case the CoE or the EU. This leads us to the question whether the position of an institution within the liberal order or the institution’s scope for

Table1: Backlash as an in-group phenomenon in liberal and non-liberal contexts

norms & institutional order	liberal	non-liberal
backlashing actor	backlash	pushback
liberal	backlash	pushback
non-liberal	pushback	Backlash

In conclusion, I reiterate that backlashing actors follow a retrograde objective, which is, however, not invariably regressive or anti-liberal. Instead, it is the normative symmetry between a backlashing actor and the institutional/normative context inside and against which the resistance is practiced, which determines whether we are faced with backlash.

3.4 Definition

As a result, I suggest understanding backlash as a descriptive rather than a normative concept:

We are confronted with backlash when *collective actors* engage in contesting both the *validity of the fundamental norms of an institution* as well as *the institution upholding, supporting and enforcing those norms*, as long as actors, norms and institutions share the *same normative conviction* and if the actors are *part of/subject to the norms and institution* they attack.

Defined thus, backlash emerges as a new and singular concept of resistance with three exceptional aspects, namely its object of critique (an institution and its fundamental norms), its process (which combines behavioural institutional contestation and discursive validity contestation) and its normative orientation (in-group resistance). This backlash concept is not redundant but describes a new form of resistance, which is in need of scientific study and which has thus far not been theorised. From an analytical point of view, the concept spans paradigmatic camps by integrating institutionalism and constructivism.

Furthermore, in difference to the backlash concept put forth by Alter and Zürn, I argue with this definition that backlash is not just a specific variant of known forms of contestation. The difference is

enforcement of its fundamental values must be taken into account. The definition of a specifically liberal in-group is further complicated by the curious observation that the concept of liberalism only works if actors already subscribe to liberal norms (Thiele 2017; Böckenförde 1976). Thus, the classification of states as part of the in-group certainly requires further clarification. Yet, as pointed out above, backlash is not exclusive to states but may be perpetrated by a wide variety of collective actors, which may more readily be classified as in- or out-group with this definition. Furthermore, only by conceiving of backlash as an in-group phenomenon can we distinguish backlash from established concepts of resistance and grasp the particularly puzzling nature of processes and conflicts such as the contention between Poland and the EU. Resistance against norms that are perceived as alien, as Western meddling or even as patronizing has always existed and is a signature characteristic of e.g., anti-colonial struggles (e.g., Carothers 2006; Steffek 2013; Debre and Dijkstra 2020: 24). In conclusion, the merits of defining backlash as a symmetrical form of resistance arguably outweigh the drawbacks of an in-group definition that requires further specification at the margins. Nevertheless, further specification remains an indispensable task for future research.

categorical, not merely gradual. Backlash involves norm contestation but cannot be reduced to a particularly radicalised form of it. Nor is the mere fact of collective actors pursuing a retrograde goal enough to speak of backlash.

Another important difference between my conceptualisation and Alter and Zürn's is the nature of the concept and its underlying logical-geometrical structure. Such conceptual issues are often neglected (Mahoney 2010: 136), but are in fact highly relevant, as a conceptualisation actually develops a theory of the phenomenon's ontology (Goertz 2006: 27). Concepts are "theoretical means for the purpose of intellectual mastery of the empirically given" (Weber 2012: 134–135).

Karen Alter and Michael Zürn (2020a: 575) conceptualise backlash by identifying necessary and sufficient characteristics of backlash. They do so largely inductively and use the special issue contributions to ensure that their concept is applied to an impressive variety of empirical cases and contexts. Thereby, they seem to presuppose backlash as a classical concept (Sartori 1970): By adding certain characteristics to the necessary core criteria they have identified, the concept can easily become more precise and conform more closely to a certain empirical manifestation.

Conversely, I posit that backlash should be thought of as an ideal type (Weber 1978, 2012). Ideal types are especially suitable tools for approaching new concepts, as they allow for theory-guided analyses and the identification of commonalities and differences between various empirical phenomena (Swedberg 2018: 184; Weber 2012: 133). Therefore, the concept of backlash suggested here is a heuristic tool, not an exact replica of a certain empirical case. The concept of backlash in my definition and as an ideal type serves as a lens, through which certain characteristics of the empirical phenomenon under study are highlighted.

The ideal type then allows for the creation of subtypes. Following its logical-geometrical structure as a radial concept (Collier and Mahon 1993: 848–853), these subtypes will have fewer characteristics than the ideal type, for example because a sub-type does not apply to all collective actors, but only to states. This conforms to the observation that backlash can occur in many variants and on many political spheres. Neither the ideal type presented here, nor the classical concept, however, can distinguish between different intensities of backlash. Alter and Zürn attempt to capture varying radicalisation of the phenomenon by the presence of the frequent companion features emotive appeals, taboo-breaking and institutional reshaping. Yet, as I have argued above, these are either common characteristics of validity contestation and as such definitional characteristics of backlash or conflate backlash with its possible consequences. Backlash, by its very nature, is exceptionally radical. The comparison of empirical cases to the ideal type will show, whether backlash can assume different intensities, on which factors these intensities depend and whether the intensity of backlash is consequential.

4. Conclusion

"[B]acklash often serves as an umbrella term for any form of disagreement" (Soley and Steininger 2018: 238). Nonetheless, faced with increasing instances of resistance denominated thus, a social science research agenda on the phenomenon is as necessary as it is promising. Scholars need to understand about the causes and consequences of backlash, not least to devise effective counterstrategies. Furthermore, as evidenced by the cross-disciplinary use of the concept, backlash has a strong integrative potential within the social sciences and beyond.

Yet, such a research agenda depends on the prior meticulous conceptualisation of the phenomenon. Karen Alter and Michael Zürn have taken up this task and developed a concept and a proto-theory of backlash as framework for a special issue on the topic. The contributions to the special issue bear witness to the broad applicability of the suggested concept as well as to the need for a common definition. The two authors provide a valuable building block for this aim.

Still, the authors' conceptualisation does not construct backlash as an exceptional kind of resistance and thus does not realise the only common ground inherent in scholars' and pundits' understandings of backlash. Particularly, backlash, according to Alter and Zürn, is no singular phenomenon. Rather, their definition makes backlash redundant, at least of the concepts of validity contestation of norms or radical forms of resistance, such as dissidence. If backlash is defined thus, it confuses our understanding of global processes of resistance, rather than enabling a thorough analysis of such processes, which is a prerequisite to designing effective counter-measures.

Contrary, I argue that backlash must be understood as a distinct phenomenon in order for the concept to develop scientific significance and analytical leverage. Thus, I have concentrated on identifying what makes backlash exceptional. Starting from established theories of resistance, which are close to backlash: norm contestation and institutional contestation, I have devised a new conceptualisation of backlash, which differs from Alter's and Zürn's definition in three crucial respects: the object of critique, the process of backlash and its normative orientation. Conversely, I retain the definition of actors and the separation between the concept and its effect. I understand backlash as a phenomenon, whereby collective actors contest both an institution as well as the validity of the institution's fundamental norms as long as this happens within an in-group with a shared normative persuasion.

This revised definition of backlash is meaningfully different from the concept advanced by Alter and Zürn. Firstly, it allows for a more nuanced analysis of processes of resistance. It is not redundant with established theories of resistance. Accordingly, it grasps a new and puzzling form of resistance. At the same time, this new concept of backlash also helps researchers to sharpen established concepts and theories of resistance, such as norm contestation, institutional contestation, revolution or dissidence, to name only some. Whereas the astonishing variety of examples for backlash that Alter and Zürn mention underlines the interdisciplinary promise of the concept, it also underlines the need for a conceptualisation with more discriminating power.

Backlash, as defined in this article, is a primarily descriptive concept. It is also an ideal type, which, as a heuristic tool, seems to be the most suitable basis for research on the phenomenon. This ideal type especially unfolds its potential when used as a template, against which empirical cases are analysed. As the emphasis of this article was on conceptualising backlash, rather than theorising its causes and consequences, this task of applying the definition to different empirical instances of supposed backlash remains for future research. Still, as the concept suggested here is firmly anchored in the theories on institutional contestation and norm contestation, the causes, which have been advanced for these phenomena, already set the scene for investigations into the causes of backlash: Institutional contestation is mostly based in a rationalist ontology, which suggests material causes for it. By contrast, in the constructivist ontology of norm contestation research, causes are non-material and unobservable. Such a firm anchor is arguably indispensable when investigating a new phenomenon. Moreover, the investigation into the causes of backlash will bring these theoretical approaches into conversation and thereby promises important theoretical advances, which go well beyond the mere phenomenon.

Alter and Zürn (2020a: 577) expressly meant their conceptualisation of backlash to provoke. I reiterate the potential of the phenomenon of backlash for the social sciences and echo their call for a new research agenda on backlash. With the conceptualisation of backlash in this paper, I have attempted to address the shortcomings of their pathbreaking definitional exercise and to provide a theoretical foundation as a fruitful basis for much-needed further investigations.

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