

Commentary

Democracy, Democratization, Institutions, and Inequality: Nobel-Winning Insights from Daron Acemoglu and His Collaborators

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Abstract

This paper explores the seminal contributions of Daron Acemoglu and his collaborators to the understanding of democracy, democratization, institutions, and inequality, as recognized by the 2024 Nobel Memorial Prize in Economic Sciences. It delves into the stability and erosion of democratic institutions, emphasizing the interplay between historical legacies, class structures, and strategic political interactions. The analysis synthesizes insights from rational-choice theory, historical institutionalism, and comparative political economy, highlighting the critical role of both formal and informal institutions in shaping political outcomes. Key concepts such as critical junctures, path dependence, and the dynamic balance between state capacity and societal power—termed the “Red Queen effect”—are examined to explain the persistence and transformation of political regimes. The paper also addresses the implications of economic inequality for democratic stability and the continuous process of adaptation required to maintain inclusive institutions. By integrating theoretical perspectives and empirical evidence, this work provides a comprehensive framework for understanding the complex dynamics of democratization and offers policy recommendations for strengthening democratic resilience in the face of contemporary challenges.

Keywords: Democracy, Institutions, Inequality, Path Dependence, Critical Junctures, Acemoglu

1. Introduction

The stability of democratic institutions worldwide has become an increasingly pressing concern in recent decades. Even in regions long considered bastions of democratic governance, we observe an erosion of checks and balances, a rise in populist movements, and the persistence of stark economic inequalities. These developments erode public trust and raise fundamental questions regarding the emergence, consolidation, and long-term viability of democracy. Why do some democracies withstand periods of significant challenge while others succumb to authoritarian tendencies or hybrid regimes? What role do historical legacies, evolving class structures and strategic political interactions play in determining the fate of political institutions? Are the challenges facing contemporary democracies simply a matter of weakened institutional safeguards, or do they represent a more profound transformation in the nature of democracy itself?

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The 2024 Nobel Memorial Prize in Economic Sciences recognized the work of Daron Acemoglu and his collaborators, which provides a crucial framework for addressing these questions. Their scholarship, while influential, has also stimulated significant debate within the academic community. By synthesizing insights from rational-choice theory, historical institutionalism, and comparative political economy, Acemoglu and his colleagues offer a nuanced perspective that transcends traditional modernization theories or explanations solely focused on elite behaviour. They emphasize that both formal and informal institutions, which are the product of historical contingencies and path-dependent processes, are key determinants of whether a society achieves an inclusive, prosperous democracy or remains mired in extractive, stagnant authoritarianism.

Their scholarship also underscores the importance of critical junctures, path dependence, and non-linear effects of inequality. Acemoglu and colleagues reveal that political change involves strategic bargaining between elites and citizens, influenced by credible threats, expectations, and social mobilization. Furthermore, *The Narrow Corridor* (Acemoglu & Robinson, 2019) introduces the dynamic interplay between state capacity and societal power. Democracy flourishes within a narrow corridor of balanced forces, continuously maintained through the “Red Queen effect,” where state and society must both evolve and adapt to preserve liberty. While a compelling metaphor, the “Red Queen Effect” also raises questions about the specific mechanisms of this continuous “adaptation and contestation.” How do we empirically identify and measure this constant dynamic? Is it always necessarily progressive, or could this perpetual struggle also lead to instability or even democratic erosion under certain conditions?

2. The Institutional Perspective on Democracy and Development

Institutions—the formal laws, informal social norms, and organizational structures that govern human interaction—are not merely a backdrop to political and economic life. Instead, as articulated by Acemoglu and Robinson, they are dynamic, evolving entities shaped by power dynamics, historical accidents, and the strategic choices of key actors. This perspective builds upon the foundational work of Douglass North (1990), who argued that institutional arrangements, such as the secure enforcement of property rights, are fundamental drivers of long-term economic performance and political outcomes.

Acemoglu and Robinson make a crucial connection between *inclusive* economic institutions (e.g., broadly protected property rights and open and competitive markets) and the emergence and durability of *inclusive* political institutions and robust democracies. Conversely, *extractive* institutions, which concentrate wealth and power in the hands of a few, create strong incentives for elites to resist reforms that would broaden political participation. This line of reasoning is consistent with the classic analyses of Barrington Moore (1966) and Rueschmeyer, Stephens, and Stephens (1992), who underlined the influence of social structures and class alliances on the formation of different political regimes.

The framework developed by the authors emphasizes how institutional structures shape the bargaining environment in which political actors operate. This perspective finds support in the work of Haggard and Kaufman (2016), among others, who link state capacity, inequality patterns, and institutional arrangements to democratic prospects. Their work refines and extends existing theories in democratization studies, including rational-choice

models (Przeworski, 1991; Boix, 2003) and historical institutionalist approaches (Hall & Taylor, 1996; Mahoney & Thelen, 2010). Where modernization theory (Lipset, 1959) posited a linear progression from economic growth to democracy, Acemoglu and Robinson show that regime outcomes depend on whether institutional arrangements are inclusive or extractive, how inequalities influence elite strategies, and how past institutional choices constrain present options.

3. Institutional Origins: The Genesis of Political Order

3.1. Historical Contingencies and Critical Junctures

A key element of Acemoglu and Robinson's argument is the recognition that institutions have deep historical roots. They emphasize the importance of “critical junctures”—disruptive events such as wars, pandemics, the collapse of colonial empires, or major economic crises—that create opportunities for institutional innovation or profound transformation. Their book, *Why Nations Fail* (Acemoglu & Robinson, 2012), provides a compelling illustration of this concept, arguing that the Glorious Revolution of 1688 in England was not merely a change in monarchs but a fundamental shift in institutional power towards Parliament, initiating a long-term trajectory of inclusive development.

This perspective resonates with the work of Collier and Collier (1991), who analyzed how critical junctures shaped labour mobilization and regime outcomes in Latin America. These junctures are inherently contingent and unpredictable, reflecting the insights of O'Donnell and Schmitter (1986), who argued that transitions from authoritarian rule often arise from uncertain elite calculations and fears of social unrest.

Acemoglu, Johnson, and Robinson (2001, 2002) have provided substantial empirical evidence demonstrating how historical contingencies, particularly those related to colonial experiences, have led to divergent institutional trajectories across different regions. Their seminal article, “The Colonial Origins of Comparative Development” (Acemoglu et al., 2001), showed how early colonial strategies, influenced by factors such as settler mortality rates, shaped the establishment of distinct institutional arrangements that persisted for centuries. “Reversal of Fortune” (Acemoglu et al., 2002) further demonstrated that some regions that were once relatively prosperous subsequently experienced the imposition of extractive institutions, hindering their long-term development. These studies provide strong empirical support for the argument that historical accidents, combined with critical junctures, can profoundly influence a nation's developmental path.

3.2. Path Dependence in Institutional Development

Path dependence, a concept advanced by North (1990), underscores that once institutions are established, they tend to persist through self-reinforcing mechanisms. Acemoglu and Robinson's distinction between inclusive and extractive institutions exemplifies how past choices structure future options. Colonial legacies, for example, entrenched extractive institutions in Latin America (Acemoglu & Robinson, 2012, p. 211), shaping uneven development trajectories. Mahoney and Thelen (2010) suggest that institutional change is often gradual and endogenous, reinforcing existing trajectories rather than radically altering them. Mahoney (2001) shows how colonial institutional setups influenced diverse

developmental paths in Spanish America. North, Wallis, and Weingast (2009) also show how “limited access orders” lock in exclusive systems of power.

In the African context, Acemoglu and Robinson (2010) in “Why Is Africa Poor?” illustrate how path-dependent patterns of colonial extraction, compounded by post-colonial elite bargains, stymied the emergence of more inclusive institutions. These and similar studies reinforce the claim that even where opportunities for reform arise, the gravitational pull of past institutional arrangements often remains powerful.

3.3. The Interplay of Critical Junctures and Path Dependence

Critical junctures do not guarantee long-term reform. They set new trajectories, but consolidation depends on subsequent politics. Collier and Collier (1991) note that after democratic openings, multiple factors determine if inclusive institutions endure. Tilly’s (2007) emphasis on sustained social mobilization resonates with Acemoglu and Robinson’s logic: transformative moments initiate change, but stable democracy results from continuous, iterative bargaining and adaptation. Baumgartner and Jones (1993), applying “punctuated equilibrium” from evolutionary biology to political science, support the idea that periods of institutional stability are periodically interrupted by significant shifts triggered at critical junctures.

3.4. Institutional Types: Inclusive vs. Extractive Institutions and Their Dynamics

Inclusive institutions disperse power widely, protect property rights, and enable broad participation. This fosters economic growth, innovation, and long-term stability. However, the very concept of “inclusiveness” itself is multifaceted. Does it primarily refer to political participation, economic opportunity, social mobility, or some combination? Furthermore, are there potential tensions or trade-offs between different dimensions of “inclusiveness” in practice?

Dahl’s (1971) concept of polyarchy and Boix’s (2003) argument about the importance of economic equality are in harmony with these insights. Inclusive institutions alleviate elite fears of radical redistribution, making democratic concessions feasible and self-reinforcing. Fukuyama (2011) underscores that accountable governance and the rule of law emerge more readily in inclusive systems. Linz and Stepan’s (1996) categories of regime types, including stable democracies with institutionalized checks, mirror the logic of Acemoglu and Robinson. The “virtuous circle” of inclusive institutions, as articulated in *Why Nations Fail*, is a powerful metaphor. Imagine a snowball rolling downhill: each rotation gathers more snow, increasing its size and momentum. Similarly, each step towards greater political inclusion tends to generate more economic opportunities. This expanding economic openness fosters shared prosperity, motivating citizens to become more invested in protecting and enhancing their political freedoms. The elegance of this model lies in its self-reinforcing nature—political inclusion breeds economic opportunity, and economic empowerment fuels demands for greater political participation. This dynamic can be observed in diverse historical contexts, from South Korea’s democratization alongside its economic “miracle” to the transformative impact of inclusive institutions in post-war Europe.

Conversely, *extractive institutions*, which concentrate power and resources within a narrow elite, create a “vicious circle” of stagnation. As Acemoglu and Robinson (2012) demonstrate,

extractive political institutions reinforce extractive economic arrangements. O'Donnell's (1994) work on informal institutions like clientelism illuminates how authoritarian rulers use informal power structures to maintain control. In *The Narrow Corridor*, Acemoglu and Robinson argue that escaping this vicious circle requires a delicate balancing act: sufficient state capacity to maintain order, but also sufficient societal power to prevent that capacity from becoming oppressive. Without robust checks from society, elites can perpetuate extraction indefinitely.

Grzymala-Busse (2010) stresses that the interplay between formal and informal institutions can either support or subvert reforms, making the path to inclusivity even more challenging. Acemoglu and Robinson's focus on both formal structures and informal norms broadens the analytical scope. States can possess impressive constitutions on paper, yet lack the real-world capacity to enforce them—they become "paper leviathans." This is consistent with Helmke and Levitsky's (2004) definition of informal institutions as socially shared rules that can either complement or contradict formal norms. Migdal's (1988) concept of "strong societies and weak states" further underscores how informal social networks can either constrain or bolster state authority. A complete understanding of democratization requires examining not only constitutions and electoral laws but also the unwritten norms, cultural practices, patronage relationships, and social networks that shape political behaviour. Whether these informal rules strengthen or weaken democracy depends on their alignment with inclusive or extractive patterns.

3.5. Institutional Evolution: Persistence, Change, and Interdependence

Institutional analysis extends beyond understanding the origins of institutions; it must also examine how they persist, evolve, and interact across different spheres of society. Acemoglu and Robinson (2012) argue that elites maintain extractive institutions to protect their privileged positions. Over time, these vested interests become deeply entrenched, making reform increasingly difficult and costly. North's (1990) concept of "adaptive efficiency" and Pierson's (2004) theory of "increasing returns" help explain why established orders become progressively more resistant to change. Similarly, Olson's (1982) notion of "institutional sclerosis" describes how entrenched interests can block beneficial reforms, further solidifying the status quo.

In stable democracies, inclusive institutions tend to persist because they generate benefits that are widely shared, reducing the incentive for any single group to attempt a power grab. This inherent persistence, however, serves as a stark warning for contemporary democracies. It underscores that even well-established inclusive systems are not immune to backsliding if the underlying conditions that sustain them—broad-based prosperity, active citizen participation, and robust accountability—begin to erode.

Persistence, however, is not inherently beneficial. It can also sustain illiberal regimes, as evidenced by long-standing dictatorships where elites skillfully suppress opposition and maintain control. Democratization, according to Acemoglu and Robinson (2006), is often best understood as a bargaining process in which elites strategically grant political rights when the costs of maintaining repression become too high. This is not a benevolent act, but a calculated concession driven by power dynamics and the threat of societal unrest. This idea is in accordance with O'Donnell and Schmitter's (1986) concept of "pacted transitions" and

Przeworski's (1991) argument that democracy often emerges as the "least costly" option for elites facing pressure. Lipset (1959) further supports this, suggesting that economic development can facilitate democratization by raising the opportunity costs of authoritarian rule.

Democratization requires more than just well-designed institutions; it requires credible commitments from key actors. Over time, successful democratic transitions see new formal rules become embedded within supportive social practices. Ostrom's (1990) work underscores this point, demonstrating that durable institutions are most likely to emerge when communities develop trust and mechanisms for mutual monitoring and accountability. The interdependence of political, economic, and social institutions is a core theme in Acemoglu and Robinson's analysis. In *The Narrow Corridor*, they emphasize that both societal mobilization and state capacity are jointly necessary for a country to enter and remain in the "narrow corridor" of liberty.

Tilly (1990) supports this perspective, showing that democratic states historically emerged through complex negotiations involving warfare, taxation, and social cooperation. Institutions are not isolated actors; they shape and are shaped by economic growth, class structures, and cultural norms. This interdependence means that democratization cannot be explained by any single factor. Instead, it is the result of an ongoing interplay between multiple domains, each influencing the incentives, actions, and capabilities of key actors.

4. Strategic Interaction, Dynamic Modelling, and Multiple Actors

How exactly do these institutional dynamics play out in the real world? Acemoglu's emphasis on strategic interaction aligns with the rational choice tradition in democratization studies, as seen in Przeworski (1991) and Boix (2003). However, it is very important to distinguish Acemoglu's approach from purely instrumentalist accounts. While instrumentalism focuses on elites strategically manipulating institutions for their own benefit (Shepsle, 1989), Acemoglu's framework incorporates a more dynamic and interactive view, where institutions themselves shape the strategic landscape and influence actors' preferences over time. This is in line with the "historical institutionalist" perspective (Hall & Taylor, 1996), which suggests the "stickiness" of institutions and their capacity to constrain and enable action.

Furthermore, Acemoglu and his collaborators' work addresses the limitations of earlier modernization theories (Lipset, 1959), which posited a linear relationship between economic development and democracy. Focusing on strategic interactions and institutional dynamics, they explain why economic development does not always lead to democratization and why democratic transitions can occur in less developed countries. This aligns with the "transitology" literature (O'Donnell & Schmitter, 1986), stressing the importance of political factors and strategic choices in transitions from authoritarian rule. However, unlike some transitology approaches that were criticized for being overly focused on elite pacts and neglecting broader societal forces (Karl, 1990), Acemoglu and Robinson's framework incorporates both elite-level bargaining and mass mobilization as vital elements.

In *Economic Origins*, Acemoglu and Robinson (2006) state, "The nature of institutions affects how credible the promises made by the elite are, and in turn, this credibility affects whether citizens will accept policy concessions instead of demanding democracy" (p. 214). This illustrates the significant interplay between strategic action and institutional context.

The Narrow Corridor extends this analysis to the broader interaction between state and society, echoing O'Donnell's (1994) concept of "delegative democracy" and Przeworski's (1991) "contingent consent."

4.1. Dynamic Modelling of Political Change Over Time

Acemoglu's framework adopts a dynamic perspective on political change, contrasting with Huntington's (1991) "waves of democratization." His approach underscores path dependency, where past institutional choices shape future possibilities. This aligns with Mahoney and Thelen's (2010) "gradual institutional change" theory. This approach allows for the analysis of path dependence and the long-term consequences of political choices. This aligns with the "new historical institutionalism" (Thelen, 1999), which accents the importance of sequencing and timing in institutional change.

However, while some historical institutionalist approaches have been criticized for being overly deterministic, Acemoglu's framework allows for agency and strategic choice within historically constrained contexts. In *Economic Origins*, democratization is modeled as a dynamic process where past decisions about repression or concession influence future opportunities for democratic reform, operationalized through a "Markov perfect equilibrium" (Acemoglu & Robinson, 2006, p. 231). This dynamic approach, considering the future implications of present decisions, distinguishes Acemoglu's work from more static analyses. This echoes O'Donnell and Schmitter's (1986) work on transitions from authoritarian rule, which suggests the sequencing of political reforms while contrasting with Huntington's episodic view. The emphasis on gradual institutional change in Acemoglu's work also connects to debates about institutional "punctuations" versus gradual evolution (Krasner, 1984). While Krasner focused on rare moments of radical institutional change, Acemoglu's framework suggests that significant political transformations can occur through accumulated incremental changes driven by strategic interactions. This also resonates with Streeck and Thelen's (2005) work on "institutional change in advanced political economies," which stresses various modes of gradual institutional transformation.

4.2. Incorporation of Multiple Actors with Diverse Interests

Unlike binary models (elites vs. masses), Acemoglu incorporates multiple actors with diverse interests, aligning with Boix (2003) and Ansell and Samuels (2014), who accent class-based coalitions. In *Economic Origins*, the "three-class model" views the middle class as a potential "pivot actor" in democratic transitions, acting as a stabilizing force (Acemoglu & Robinson, 2006, p. 267). This resonates with coalition theories, such as those of Rustow (1970) and Luebbert (1991), emphasizing multi-class coalitions in democratization. Acemoglu's incorporation of multiple actors, particularly the middle class, addresses a key limitation of earlier democratization theories that focused primarily on the dichotomy between elites and masses. This focus on the middle class also connects to debates about the role of economic inequality in democratization (Acemoglu & Robinson, 2006). By showing how the relative size and power of the middle class can influence the likelihood of democratic transitions, Acemoglu's work offers a nuanced perspective on the relationship between economic structure and political regime.

Svolik (2012) likewise analyzes how authoritarian elites manage threats from within and from popular uprisings. Although he focuses more on dictatorship survival, his work aligns with Acemoglu's broader strategic approach to understanding how authoritarian regimes may split, bargain with other elites, or concede to popular pressures. Acemoglu, Egorov, and Sonin (2008, 2012, 2015, 2020) extend these ideas, modeling coalition formation, the dynamics of constitutions, and how changing environments affect political equilibria. Their analyses capture a variety of actors beyond a simple elite-mass dichotomy, highlighting fluid alliances and strategic behaviour in non-democratic as well as transitional contexts.

4.3. Role of Expectations in Shaping Behaviour

Acemoglu stresses the role of expectations, building on Przeworski's (1991) concept of "uncertainty." Expectations about future mobilization influence elite decisions regarding concessions or repression. As Acemoglu and Robinson (2006) explain, "If elites anticipate that repression will become more costly in the future due to mobilization or changes in social conditions, they are more likely to concede democratization" (p. 93). This links to O'Donnell and Schmitter's (1986) concept of "contingency," where elite expectations about future threats shape democratization decisions. Acemoglu's emphasis on expectations builds on the work of rational expectations theorists in economics (Muth, 1961) and its application to political science. By incorporating expectations into the analysis of strategic interactions, Acemoglu's framework points out the importance of information, credibility, and trust in shaping political outcomes.

This connects to debates about the role of "common knowledge" and "focal points" in coordination games (Schelling, 1960). For instance, if both elites and masses expect a successful mobilization for democracy, elites are more likely to concede to preemptively avoid costly conflict. Conversely, if elites believe that popular mobilization will be weak or quickly suppressed, they are more likely to resist democratization. This demonstrates the self-fulfilling nature of expectations in political transitions.

5. Analysis of Equilibrium Selection in Complex Political Environments

Acemoglu and Robinson use game-theoretic equilibrium selection to explain how particular democratic outcomes emerge. Their approach shifts attention away from historical institutionalism's emphasis on "critical junctures" (Mahoney & Thelen, 2010) and instead highlights the strategic interactions that lead to a specific equilibrium. In *Economic Origins*, they argue that the possibility of democratization hinges on whether elites can credibly commit to future redistribution; when such commitments are not possible, elites often favour institutional changes as a more reliable way to ensure policy shifts (Acemoglu & Robinson, 2006, p. 215). This focus on credible commitments parallels North and Weingast's (1989) exploration of the Glorious Revolution, which shows how institutional mechanisms can uphold promises over time. By applying game-theoretic analysis to equilibrium selection, Acemoglu and Robinson offer a more precise understanding of how one political outcome prevails over other potential trajectories, contributing to discussions on path dependence and "lock-in" (Arthur, 1989).

These ideas extend further in Acemoglu, Egorov, and Sonin's (2013) "A Political Theory of Populism," which employs signaling games and incomplete information to show how

populist leaders capitalize on voters' fears and resentment. In "Why Do Voters Dismantle Checks and Balances?" (Acemoglu, Robinson, & Torvik, 2013), they examine the puzzle of why voters sometimes support leaders who erode institutional constraints. Taken together, these studies illustrate how equilibrium selection is driven by both short-term calculations about policy gains and the long-term institutional consequences that follow.

6. Economic Inequality and Democratic Stability

The relationship between inequality and democratization has long been central to political economy. Early models, like the "redistributionist model" by Meltzer and Richard (1981), suggested that greater inequality increases the redistributive demands of the median voter. As these demands grow, economic elites resist democratic reforms to avoid expropriation. Boix (2003) refined this by stating that elites with immobile, taxable wealth (e.g., land) are more likely to block democratization than those with mobile, diversifiable capital. Acemoglu and Robinson (2006) proposed a non-linear, inverted U-shaped relationship between inequality and democratization likelihood. Under moderate inequality, elites may preemptively cede power to avoid high repression costs, facilitating democratic institutions. In severe inequality contexts, repression is less costly than conceding power, while very low inequality reduces revolutionary threats, minimizing reform incentives.

This explains why highly unequal societies in Latin America entrenched authoritarianism (Sokoloff & Engerman, 2000; Engerman & Sokoloff, 2002), whereas moderately unequal societies like pre-industrial Britain transitioned peacefully to parliamentary rule (North & Weingast, 1989). Historical and comparative studies support these insights. Acemoglu and Robinson (2012) in *Why Nations Fail* show how colonial Latin America's extractive institutions and extreme inequality led to cycles of authoritarian rule, while Britain's balanced wealth distribution facilitated inclusive institutions. Empirical evidence by Easterly (2007) and Houle (2009) further supports the link between extreme inequality and regime instability. By synthesizing insights from classical political economy, comparative-historical analysis, and advanced empirical techniques, they have reframed debates on inequality, institutions, and democracy. Their non-linear model and emphasis on the interplay between economic structures and political power have inspired research into micro-level mechanisms of political transitions, cultural and ideological factors, path dependence, resource-based autocracies, and state capacity. While debates continue about cultural dynamics and preference formation, their influence remains substantial, enriching the understanding of why some societies achieve stable democracy while others do not.

7. Navigating the Narrow Corridor: State Capacity, Societal Power, and the Red Queen Effect

Building upon their earlier work (Acemoglu & Robinson, 2006; 2012), the concept of the "narrow corridor" posits that stable democracy exists in a precarious space, defined by a delicate balance between state capacity and societal power. This balance is not static; it requires constant contestation and adaptation—a dynamic process they call the "Red Queen effect" (Acemoglu & Robinson, 2019).

- **Balance Between State Capacity and Societal Power:** This core tenet distinguishes the theory from approaches that prioritize either state strength (Huntington, 1968) or societal

preferences alone. While drawing inspiration from Hobbes's "Leviathan," they emphasize the necessity of "shackling" it—demonstrating the essential role of societal mobilization in constraining state power (Acemoglu & Robinson, 2019). This resonates with Tilly's (1990) work on state formation but extends it by explicitly focusing on the emergence and role of countervailing societal forces. The example of civil society in post-Apartheid South Africa, acting as a check on the ANC's power, vividly illustrates this dynamic (Acemoglu & Robinson, 2019). Their other works (Acemoglu & Robinson, 2023; Acemoglu, Garcia-Jimeno, & Robinson, 2015) further explore and formalize this crucial balance.

- **Dynamic Equilibrium and the Red Queen Effect:** The "Red Queen effect" captures the ongoing struggle between state and society. Unlike modernization theory (Lipset, 1959), the Narrow Corridor theory emphasizes the continuous and dynamic nature of this relationship. Democracy is not a final destination but a constant process of adaptation and contestation. This perspective provides a valuable lens for understanding democratic backsliding, as underlined by Levitsky and Ziblatt (2018) and Bermeo (2016). The erosion of societal mobilization can disrupt the "Red Queen" equilibrium, allowing the state to accumulate excessive power. This contrasts with Przeworski's (1991) argument that democracy becomes self-sustaining at higher levels of economic development, underscoring the importance of ongoing societal vigilance.

- **Mechanisms of Institutional Stability and Change:** The theory's understanding of institutional stability differs from Linz and Stepan's (1996) focus on elite consensus. Acemoglu and Robinson (2019) argue that stability requires not just formal rules but also active societal support and enforcement. This is in harmony with O'Donnell's (1998) concept of horizontal accountability but adds the crucial dimension of *vertical accountability*—the role of societal mobilization in holding the state accountable.

7.1. The Shackled Leviathan

The concept of the "Shackled Leviathan" is arguably one of the theory's most significant contributions. It underscores that even in established democracies with formal checks and balances, societal power is essential to constrain state power. This distinguishes it from purely Madisonian notions of checks and balances, which primarily focus on institutional mechanisms. The theory provides a framework for understanding cases like South Africa's resistance to executive overreach under Zuma, where a robust civil society and independent judiciary, forged in the struggle against apartheid, acted as a powerful check. Chile's 2019 protests offer another example of societal mobilization effectively "shackling" the state. This also offers a more nuanced understanding of democratic backsliding than simply stressing eroding norms (Levitsky & Ziblatt, 2018).

7.2. Contemporary Applications and Policy Implications of Acemoglu and Collaborators' Institutional Framework

7.2.1. Democratic Backsliding and the Erosion of the Red Queen Effect

The contemporary phenomenon of democratic backsliding—where elected leaders gradually dismantle democratic norms and institutions—vividly illustrates Acemoglu and Robinson's core arguments. Scholars like Levitsky and Ziblatt (2018) in *How Democracies Die* and

Bermeo (2016) have documented how modern autocrats often employ legalistic manoeuvres, co-opt the judiciary, and manipulate the media to consolidate power (see also O'Donnell, 1996; Schedler, 2013; Levitsky & Way, 2010). These strategies resonate deeply with Acemoglu's emphasis on the gradual erosion of inclusive institutions. When the political equilibrium shifts towards extractive arrangements, elites can incrementally dismantle accountability mechanisms, often under a veneer of legality (Acemoglu & Robinson, 2012).

The "Red Queen effect" is central to Acemoglu and Robinson's analysis (Acemoglu & Robinson, 2019). Democratic backsliding frequently occurs when this balance is disrupted. A breakdown of the Red Queen effect occurs when societal mobilization weakens, permitting elites to capture institutions and reconfigure the rules to their advantage. This weakening of civil society can be attributed to factors such as increased political polarization (McCoy, Rahman, & Somer, 2018) and the rise of disinformation (Tucker et al., 2018).

7.2.2. The Role of Technology and Digital Media

The rise of digital media and its impact on political mobilization and democratic processes adds another layer of complexity to Acemoglu's framework. Margetts (2016) underlines how digital platforms can lower the costs of collective action, facilitate social movements, and potentially enhance citizen engagement. However, these same technologies can be exploited for manipulation, propaganda, and surveillance, empowering authoritarian regimes (King, Pan, & Roberts, 2013; Morozov, 2011). Integrating Margetts' insights with Acemoglu's model suggests that the impact of technology on democracy is contingent upon the pre-existing institutional context (see also Diamond, 2010; Persson, 2020).

Acemoglu and Johnson's recent book, *Power and Progress* (2023), and Acemoglu (2022) in the Oxford Handbook of AI Governance discuss how Artificial Intelligence may exacerbate inequality or undermine democratic accountability if left unchecked by inclusive institutions. In societies with robust, inclusive institutions, digital tools can amplify citizens' voices, strengthen transparency, and reinforce societal checks on state power. Conversely, in settings characterized by extractive institutions or a weakened Red Queen effect, digital technologies can be instrumentalized to disseminate misinformation, suppress dissent, and consolidate authoritarian control (Deibert, 2013; Gunitsky, 2015).

7.2.3. Policy Implications for Strengthening Democratic Resilience

Daron Acemoglu and his collaborators' institutional framework provides a roadmap for policy interventions aimed at strengthening democratic resilience and counteracting backsliding. These implications can be summarized as follows:

Prioritizing Inclusive Institutions: The foundation of democratic stability lies in establishing and maintaining broadly inclusive political and economic institutions (Acemoglu & Robinson, 2012; North, Wallis, & Weingast, 2009). This entails ensuring broad power-sharing arrangements, robust property rights protection, and equal economic opportunities. By mitigating elite fears of expropriation and fostering a sense of shared prosperity, inclusive institutions create a conducive environment for sustainable democratic governance.

Addressing Inequality as a Threat to Democracy: Acemoglu and Robinson suggest that extreme economic inequality poses a significant threat to democratic stability (see also Piketty, 2014; Stiglitz, 2012). High levels of inequality can incentivize elites to resist democratization

or actively undermine democratic institutions to protect their privileged position. Therefore, policies that reduce inequality, such as investments in education, healthcare, and social safety nets, are not only socially desirable but also central for reducing elite anxieties and creating conditions for a more equitable and stable political order.

Reinforcing Checks and Balances: Strong and independent institutions are essential for maintaining the delicate balance between the state and society (Przeworski, 2019; Haggard & Kaufman, 2016). This includes an independent judiciary capable of upholding the rule of law, impartial electoral commissions that ensure free and fair elections, and effective legislative bodies that hold the executive branch accountable. However, Acemoglu and Robinson stress that formal checks and balances are insufficient without a mobilized citizenry that actively participates in political life and demands accountability from its leaders (see also Putnam, 2000 on the importance of social capital). “Why Do Voters Dismantle Checks and Balances?” (Acemoglu, Robinson, & Torvik, 2013) details the mechanisms by which voters themselves can be complicit in eroding constraints, particularly in polarized or populist contexts.

Protecting Media Freedom and Fostering a Vibrant Civil Society: A free and independent press, along with a vibrant civil society, plays a central role in constraining elite power, exposing corruption, and fostering informed public debate. As Meijer (2014) argues, norms of transparency are vital counters to elite manipulation. Protecting the free flow of accurate information (Sunstein, 2018) and supporting investigative journalism is vital for preventing democratic backsliding.

The Imperative of Continuous Societal Engagement: Acemoglu and Robinson’s framework underscores that democracy is not a static endpoint but an ongoing process that requires constant vigilance and engagement. The Red Queen effect stresses the necessity of sustained societal pressure to maintain the balance between state power and citizen participation. As documented by Tarrow (1994) and Skocpol (2003), periodic surges in mobilization are vital for revitalizing democratic institutions and counteracting tendencies toward elite dominance. Acemoglu et al. (2024) further demonstrate how democratic institutions can become self-enforcing when they deliver broad-based public goods.

The challenges facing contemporary democracies—including populism (Müller, 2016; Mudde, 2007), identity-based polarization (Fukuyama, 2018), digital disinformation (Benkler, Faris, & Roberts, 2018), and widening inequalities—further underscore the enduring relevance of Acemoglu and Robinson’s work. Their framework helps explain why even established democracies can experience backsliding when elites exploit societal divisions, weaken institutional constraints, and curtail accountability. In an increasingly complex and interconnected world facing challenges such as climate change, pandemics, and economic volatility (Rodrik, 2011), the need for responsive and accountable institutions is more pressing than ever.

To effectively address these challenges, societies must cultivate a robust Red Queen dynamic: a capable state balanced by a mobilized and empowered citizenry underpinned by inclusive policies and transparent governance. Acemoglu and Robinson’s framework provides both a diagnostic tool for understanding the fragility of democracy and a prescriptive guide for strengthening its foundations.

8. Debates and Discussions

While Acemoglu and his colleagues have made seminal contributions to our understanding of the interaction between long-run development, institutions, democracy, and democratization, their works are, of course, not immune to scholarly critique. Debates persist concerning both its empirical grounding and theoretical comprehensiveness. A recurring criticism centers on the framework's prioritization of institutions as the *paramount* determinant of economic growth. This emphasis, some argue, risks oversimplifying the complicated interplay of factors that shape historical trajectories. A more holistic understanding, these critics contend, requires incorporating the influence of enduring cultural norms, the constraints and opportunities presented by geographical endowments, the disruptive power of technological advancements, and the agency of individuals and groups in shaping societal outcomes.

Moreover, the very conceptualization of “institutions” within the framework has been questioned. Critics argue that the term's inherent ambiguity can lead to imprecise application and, in some cases, tautological reasoning. The precise causal pathways linking specific institutional forms to economic performance, as well as the directionality of that relationship, remain subjects of ongoing scholarly investigation and require more rigorous explication.

Empirically, their framework's reliance on selected historical narratives has been challenged. Scholars have raised concerns regarding the generalizability of findings derived from specific case studies, pointing to alternative interpretations of historical events and the existence of counter-examples that appear to contradict the framework's central claims.

Finally, some have characterized their focus on formal institutional structures as overly deterministic. Critics suggest that this perspective may understate the role of historical contingency, path dependence, and the potential for diverse, and even divergent, developmental trajectories. The frequently employed dichotomy of “inclusive” versus “extractive” institutions, while analytically useful, is also viewed by some as a simplification that fails to capture the nuanced spectrum of institutional arrangements and the gradual, often contested processes of institutional evolution (for example, Brancaccio & De Cristofaro, 2022; Dzionek-Kozłowska & Matera, 2021; Berman, 2020)

9. Conclusion

Acemoglu and his collaborators, recipients of the 2024 Nobel Memorial Prize in Economic Sciences, demonstrate that the emergence, sustainability, and erosion of democracies are not predetermined outcomes of economic growth or simple elite pacts. Instead, they result from dynamic interactions, shaped by historically contingent paths and the interplay of inclusive and extractive institutions. Their work combines rational-choice models, historical institutionalism, and comparative political economy to illuminate how both formal frameworks and informal norms shape political behaviour and outcomes.

By foregrounding critical junctures, path dependence, and strategic bargaining, Acemoglu and co-authors explain why regime transitions may stall, why seemingly entrenched autocracies sometimes collapse, and why institutions in certain contexts evolve into stable democracies. Their analyses of inequality show that extreme economic disparities can lead to authoritarian entrenchment, while moderate inequality may encourage preemptive reforms. In *The Narrow Corridor*, they extend these arguments, highlighting how effective democracy hinges on a balance between robust state capacity and organized societal power, maintained

through the perpetual “Red Queen effect.”

Beyond offering an interpretive framework, Acemoglu and his collaborators provide timely insights for policymakers. Their emphasis on inclusive institutions calls attention to the urgent need to curb social and economic exclusion, nurture vibrant civil societies, and bolster accountability mechanisms, especially in an era of heightened polarization and digital misinformation. By synthesizing structural analysis with strategic choice, their research offers both explanatory power for democratic failures and a constructive foundation for reform efforts.

In a world grappling with resurgent authoritarianism and complex global challenges, Acemoglu's Nobel-winning scholarship is not just a diagnostic tool, but a call to action. Perhaps its most enduring insight is not simply the importance of institutions, but the imperative of ongoing societal vigilance and proactive engagement to ensure that those institutions indeed remain “inclusive,” and that the Leviathan remains perpetually and intentionally shackled by an empowered citizenry. This, arguably, is the most crucial challenge for democratic resilience in the 21st century and beyond.

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