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Challenges in conceptualizing and measuring meanings and understandings of democracy

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Abstract Research on meanings and understandings of democracy is growing. But besides useful theoretical and empirical insights, this research produces open questions concerning the conceptualization and the measurement of meanings of democracy. This special section—and especially this introductory paper and the different contributions—reflect on several key challenges and thereby go beyond the debate about advantages and disadvantages of open and closed questions measuring meanings of democracy in surveys. Both conceptualization and measurement have different challenges which researchers should take into account when developing research designs, specifically by doing cross-cultural comparisons. Other challenges are connected to the debate on universalism versus relativism and the usage of various terms, which are often not clearly defined. This paper offers an analytical framework to distinguish between meanings and understandings of democracy, thereby integrating comparative political theory and empirical democracy research through inductive and deductive approaches. And it gives an overview of the contributions of this special section. In sum, research on meanings and understandings of democracy is needed to gain a better picture of political cultures around the world.

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Herausforderungen für die Konzeptualisierung und Messung von Demokratieverständnissen

Zusammenfassung Die Forschung über Bedeutungen und Verständnisse von Demokratie nimmt zu. Neben zahlreichen theoretischen und empirischen Erkenntnissen ergeben sich aus dieser Forschung auch eine Vielzahl offener Fragen und Herausforderungen bezüglich der Konzeptualisierung und Messung von Demokratieverständnissen. Diese Special Section reflektiert mehrere dieser zentralen Fragestellungen und geht damit über die Debatte der Vor- und Nachteile offener und geschlossener Fragen zur Messung von Demokratieverständnissen in Umfragen hinaus. Sowohl die Konzeptualisierung als auch die Messung haben unterschiedliche Herausforderungen, die Forscher bei der Entwicklung von Forschungsdesigns berücksichtigen sollten, insbesondere bei kulturübergreifenden Vergleichen. Weitere Herausforderungen stehen im Zusammenhang mit der Debatte über Universalismus versus Relativismus und der Verwendung verschiedener Begriffe, die oft nicht eindeutig definiert sind. Mit dem folgenden Beitrag präsentieren wir einen analytischen Rahmen zur Unterscheidung der Bedeutungen und des Verständnisses von Demokratie und integrieren dabei die vergleichende politische Theorie und die empirische Demokratieforschung mittels induktiver und deduktiver Ansätze. Zudem stellen wir die Beiträge dieser Special Section kurz vor. Zusammenfassend lässt sich sagen, die Forschung zu Bedeutungen und Verständnissen von Demokratie ist dringend notwendig, da nur so ein besseres Bild der diversen politischen Kulturen gewonnen werden kann.

1 Introduction

Research on the meanings and understandings of democracy has recently become more and more important in two specific fields. In the context of political culture research, it moves beyond the classical cognitive interest in political cultural research in the tradition of Almond and Verba (1963) and Easton (1975), which almost exclusively asks for the support of democratic values and political objects by the population (e.g. Norris 1999, 2011; Braizat 2010; Bratton 2010; Diamond 2010; Chu and Huang 2010; Shi and Lu 2010; Weßels 2015; Schubert and Weiß 2016a; Ferrín and Kriesi 2016; Mohamad-Klotzbach and Schlenkrich 2016; Pickel 2017; Ulbricht 2018). The analysis of the meanings and understandings of democracy that prevail in populations helps us to identify the measures people use to evaluate, support or reject the political regimes in which they live—both democracies and autocracies—and to act politically in them.

We find meanings and understandings of democracy also in central debates of democracy research, especially the "quality of democracy"-debate (Lauth 2004; Munck 2009, 2016; Coppedge et al. 2011; Pickel and Pickel 2012; Pickel et al. 2015, 2016), the crisis diagnoses of democracy (e.g. Keane 2009; Ercan and Gagnon 2014; Schaal 2016; Merkel and Kneip 2018), the legitimacy of democracies (Kriesi 2013, Celikates et al. 2015), their frontiers (Förster and Lemke 2017) and democratic innovations (Smith 2009; Newton and Geissel 2012).

Furthermore, the Western conceptual history of democracy has already undergone several comprehensive transformations of meaning. The most serious transformation was probably from small-scale, direct-democratic models to large-scale, representative democracy models (Dahl 1989; Keane 2009). As the next major shift in meaning, the literature discusses the expansion of the discourse on the meanings of democracy beyond the Western context of discourse, which is expected to lead to a confrontation of globally different ideas on democracy (multiple meanings) (Schubert and Weiß 2016b; Little 2018).

Today, various aspects can be studied in the field:

a) variance of space (different countries, regions, subnational levels);
b) variance of time (premodernity versus modernity; longitudinal analysis);
c) origins of specific meanings and understandings of democracy;
d) variances in regime types (democracies, autocracies, hybrid regimes) or governmental systems (majoritarian versus consensus democracy; parliamentary versus presidential democracy);
e) differences in social groups (e.g. age cohorts, education, income, ethnicity);
f) differences in political groups (voters, party supporters/members, ideological spectrum); or
g) meanings and understandings of democracy as independent or dependent variables.

With initial findings from these multiple meanings of democracy, empirical research can identify differences between regions, e.g. between Western and non-Western countries (Dalton et al. 2007; Schubert and Weiß 2016a); differences between countries in the same region (Bratton and Mattes 2001; Ferrín and Kriesi 2016; Pickel 2016; Robbins 2015; Schedler and Sarsfield 2007; Shastri et al. 2017); and differences between social groups (Shastri et al. 2017; Jacobsen and Fuchs 2020; Ceka and Magalhães 2020) and generations (Sack 2017). In addition, we can observe and discuss different meanings and understandings of democracy between and within the political elites and citizens (Oschlies 2013) and between democratic and undemocratic meanings of democracy (Lu and Shi 2015; Kirsch and Welzel 2019).

Finally, existing research shows that there are various methodological approaches to expanding knowledge about meanings and understandings of democracy. Of course, there is the classical approach of survey research (Dalton et al. 2007; Ferrín and Kriesi 2016; Kirsch and Welzel 2018). We find open and closed questions in various large survey programs such as the World Values Survey (WVS), the European Social Survey (ESS), all Global Barometers (Asia Barometer, Afrobarometer, Arabbarometer, Latinobarometro). Several methods are used to analyze the survey

data, mostly factor analysis (e.g. Pickel 2016; Kirsch and Welzel 2019), but recently latent class analysis has also been used (Davis et al. 2020).

In addition to the survey approach, there are also studies that work with alternative methodological approaches such as focus groups (King and Wand 2007; Gillman 2018), the Q-method (Oschlies 2013; Andersen et al. 2018; Carlin 2018), repertory-grid (Osterberg-Kaufmann 2016, Osterberg-Kaufmann and Stadelmeier 2020), text mining (Lemke and Wiedemann 2015), discourse analysis (Lu and Shi 2015; Holbig 2016; Zapf 2016), content analysis with social media (Valera-Ordaz 2019), visualizing through drawing (Silveira and Heinrich 2017), visual interpretation narrative exercise (Hinthorne 2012), or mixed-method designs (Bratton et al. 2005). All these methodological approaches help us to gain insights into the explicit and implicit meanings and understandings of democracy in different social groups and/or countries.

In the future, one of the most important tasks of comparative democracy research (Schubert and Weiß 2016b) will be to systematically record different meanings empirically and bring them together to form a common, globally oriented and transculturally based understanding of the term democracy. With suitable methods for measuring the meanings and understandings of democracy, it might be possible to identify a common core of democracy that can be applied across countries and cultures with its abstract principles, and which, at the same time, does not commit these principles to a specific institutionalization, such as participation in elections. Furthermore, this common core of democracy would be open to transitions of the concept due to democratic innovations.

Nevertheless, there are some challenges for scholars working in the field. For instance, it is not possible to speak of uniform findings, which makes a comparison of different theoretical considerations and methodological analysis strategies difficult. Quite a number of terms are used in the literature to investigate individual levels of knowledge about democracy, in some cases using them synonymously. This makes it necessary to encourage a clear use of terms. Only then would it be possible to think about appropriate ways to operationalize and measure meanings and understandings of democracy. As we have seen, the field is open to a broad range of qualitative and quantitative methods, which could be helpful for several of the above-mentioned research areas.

The special section presents different conceptual and methodological answers to some of the challenges we address in the following section. In this introduction, we provide a framework for distinguishing meanings and understandings of democracy—a differentiation that is not yet clearly addressed in current research. The studies contribute to the debate on democracy as a universal concept versus democracy as a relativistic concept and lay out interconnections of various conceptual approaches and research strategies.

This paper is structured as follows. First, we address several challenges concerning the conceptualization, operationalization and methodological aspects concerning meanings and understandings of democracy. Second, we comment on two current research issues. We give some insights into the universalism-versus-relativism debate and we give a critical overview on the usage of terms in this research field. Third, we present an analytical framework to distinguish meanings and understand-

ings of democracy in future research. Finally, we give an overview on the several contributions of this special section.

2 Three strains of challenges: conceptualization, operationalization, methodology

The empirical analysis and interpretation of the results arising from the various approaches in the field of democracy and political culture research depend on three decisive key criteria: conceptualization, operationalization, and methodological approaches. These three aspects produce certain challenges:

Challenges of conceptualization At the core of these challenges lies the consideration of what is generally (public) and specifically (experts) associated with the concept of democracy. When we analyze meanings and understandings of democracy, we need to think about what democratic characteristics and/or understandings of democracy we use for the investigation. The use of a thin or thick concept is just as conceivable as the inclusion or omission of relevant aspects (e.g. non-democratic features) or they stretch the concepts too far beyond their original intention.

Furthermore, it is necessary to consider how identity, experience, tradition, culture, language, religion, knowledge, etc. influence the process of conceptualization in the minds of the scholars and the citizens under investigation.

Challenges of operationalization In terms of operationalization, it is important to consider which measuring instruments and indicators are suitable for empirically measuring citizens' knowledge and perception of the concept of democracy. While the exploration of meanings tends to raise the question of inductive forms of data collection, measuring the understandings of democracy requires the examination of existing items for their usefulness as well as the development of new item sets. For this purpose, both open and closed question formats should be used. Furthermore, the question arises whether, in addition to the frequently used Likert scale, Guttman scales could be used to examine differences in the significance of various dimensions of democracy. The debate between ranking and rating in survey research or the question of dichotomous or gradual measurements also play a role. In this context, it is also important to consider appropriate aggregation rules for the dimensionality of theoretical concepts of democracy. All these aspects have to be related to the systematized concept(s) (Toshkov 2016) that are theoretically claimed.

Methodological challenges The third group of challenges deals, for example, with the handling of the measurement invariance of instruments (items, scales) in intercultural analyses (e.g. Jacobsen and Fuchs 2020). In this context, the question of how to deal with obvious lip service and the problem of social desirability (both in a democratic and in an authoritarian context) is raised constantly. In addition, as in any empirical study of social phenomena, problems of selection bias through the selection of cases and data must be taken into account. These considerations are complemented by findings from a somewhat newer field of research that deals with

the problem of dealing with cultural and linguistic equivalence (van de Vijver 2003; van Deth 2013; Schaffer 2014).

3 Tying in with current research

3.1 The universalism–relativism debate

In the debate about concepts and support for democracy, we basically have two opposing positions—even if it is not always 100% clear where the respective authors can be classified. On the one hand we have those who say democracy is a worldwide universal value and on the other hand those who say democracy is relative (see Fig. 1).

The argumentation of Amartya Sen (1999), as one of the advocates of the concept of democracy as a universal value, should be taken here as an example of this position. She says the value of democracy includes firstly an intrinsic importance in human life, as every human being desires freedom and the ability to exercise civil and political rights. Secondly, it includes an instrumental role that people obtain by expressing and supporting their claims to political attention. And thirdly it is the constructive function in the formation of values, as the practice of democracy gives citizens an opportunity to learn from each other and helps a society to form its values and priorities. She argues that these merits are not regional in character and that the cultural argument does not foreclose or constrain the universal value of democracy. Sen (1999) denies cultural peculiarities or assumed civilizational predispositions imposed by our past.

Even if there are still a handful of authors (Diamond 2008; Beetham 2009) who follow comparable arguments the debate about the universal value of democracy has significantly shifted since Fukuyama (1992) announced the end of history and the final triumph of Western liberal democracy after the fall of the Iron Curtain.
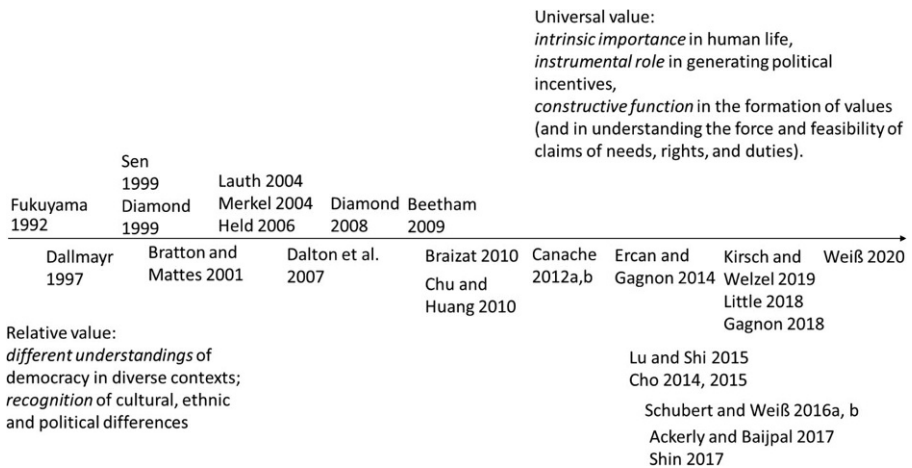
Fig. 1 State of the Art: Democracy as a universal value (Own compilation)

Theoretically initiated as early as 1997 by Dallmayr (1997) with the Comparative Democratic Theory, the idea began to grow among theorists that "liberal universalism and egalitarianism need to be tempered and corrected through closer attention to cultural heterogeneity and the 'politics of difference'" (Dallmayr 1996, p. 206). And therefore, that cultural peculiarities must be taken into account in the conception of democracy.

In the course of the partly contradictory results of the numerous large surveys about the support of democracy, which have been available to us since the 2000s, the empiricism has begun to open itself to the theoretical considerations that there are obviously different meanings and understandings of democracy worldwide. This led leading scholars and principals of regional public-opinion surveys to focus on how citizens think about democracy and weigh it against other forms of government in 2008 with the book "How People View Democracy" (Dalton et al. 2008). The essential finding was that people obviously associate the term democracy with different things or do not know what democracy is, which implicitly still means there is a correct (universal) understanding of democracy.

In more recent literature (Lu and Shi 2015; Cho 2015; Schubert and Weiß 2016a, b), it is hardly arguable anymore that democracy is a controversial concept, even to the point of the conviction that democracy can be used for different purposes in different contexts (Gagnon 2018; Weiß 2020).

Due to these developments, comparative democracy researchers have in recent years increasingly criticized the universalist concept of democracy and standardized survey research as a methodology (Ariely and Davidov 2011; Schaffer 2014). As a consequence, the search for new frontiers in the concept of democracy and a (new) core of democracy becomes necessary. This new concept of democracy should not only have the claim of global validity without normative Western bias, but should also be flexible enough to reflect democratic innovations within the West.

3.2 Some thoughts on terms in the field

Within the literature concerning democratic support and democratic political culture, we can see a shift from articles that focus on measuring political support for democracy (e.g. Norris 1999, 2011; Pickel und Pickel 2015), to articles that address the underlying meanings and understandings of democracy (Pickel 2017). This is not only a paradigmatic change, but it also offers a better understanding of the results in political support for democracy.

The terminological landscape in the theoretical, conceptual and empirical discussion of how people view democracy is very diverse and sometimes confusing. Therefore, in this section we describe this conceptual diversity, while the next section proposes a conceptual distinction between the meanings and understanding of democracy in order to initiate a systematic debate on this issue.

Starting in the 1960s, research focused on *democratic values* or *principles*. Studies by Prothro and Grigg (1960) or McClosky (1964) show that people differ in supporting abstract or specific democratic values. Respondents widely support abstract values like democracy, free speech or majority rule, but differentiate when these principles are formulated in more specific terms.

Table 1 Terminology used in analyzing meanings and understandings of democracy (Own compilation)

Meanings of democracy	
Meanings of democracy	Schaffer (1998); Diamond (2010); Chu and Huang (2010); Bratton (2010); Shi and Lu (2010); Braizat (2010); Canache (2012b); Lu and Shi (2014); Schaffer (2014); Gagnon (2018); Quaranta (2018, 2020); Weiß (2020); Zagrebina (2020); Mobrand (2020)
Understandings of democracy	
Understandings of democracy	Karlström (1996); Dalton et al. (2007); Arensmeier (2010); Schaffer (2014); Lu and Shi (2014); Youngs (2015); Pickel (2016); Ceka and Magalhães (2016); Gillman (2018); Zagrebina (2020)
Popular understandings of democracy	Dalton et al. (2007); Shin and Cho (2010); Huang et al. (2013); Cho (2014); Shin (2017); van Wessel (2017); Gillman (2018); Hu (2018)
Informed understanding of democracy/ democratic knowledge	Norris (2011); Zagrebina (2020)
Conceptions of democracy	
Conceptions of democracy	Miller and Hesli (1997); Schaffer (1998); Allan (2006); Crow (2010); Lu and Shi (2015); Bengtsson and Christensen (2016); Mauk (2016); Mohamad-Klotzbach and Schlenkrich (2016); Silveira and Heinrich (2017); Bedock and Panel (2017); Shin and Kim (2018); Ulbricht (2018); Jacobsen and Fuchs (2020); Ceka and Magalhães (2020)
Popular conceptions of democracy	Silveira and Heinrich (2017); Zhai (2019)
Populist conceptions of democracy	Steiner and Landwehr (2018)
Normative conceptions of democracy	Landwehr and Steiner (2017)
Concept of democracy	Schaffer (1998); Youngs (2015); Zagrebina (2020)
Citizens' conceptualizations of democracy	Canache (2012a)
Citizens' conceptions of democracy	Crow (2010); Fuchs and Roller (2016); Shin and Kim (2018)
Citizens' conceptions of democratic decision-making	Heinisch and Wegscheider (2020)
Further terms in the field	
Notions of democracy	Schaffer (1998); Welzel and Moreno Alvarez (2014); Youngs (2015); Welzel and Kirsch (2017); Kirsch and Welzel (2019); Valera-Ordaz (2019); Zagrebina (2020)
Councillors' notions of democracy	Heinelt (2013)
Perceptions of democracy	Ottemoeller (1998); Hinthorne (2012); Lee (2013); Youngs (2015); Teti et al. (2019); Zagrebina (2020); Zhai (2020)
Views of democracy	Camp (2001); Diamond and Plattner (2008); Westle (2015); Kriesi et al. (2016)
Popular definitions of democracy	Marcus et al. (2001)
Democratic values/ principles	Prothro and Grigg (1960); McClosky (1964); Fuchs (1999); Thomassen (1995, 2009)
Citizens' models of democracy	Kriesi et al. (2016)

Table 1 (Continued)

Terms used especially in the debate of measuring the quality of democracy	
Types of democracy	Collier and Levitsky (1997); Kaiser (1997); Schmidt (2002)
Profiles of democracy	Bühlmann et al. (2012); Lauth (2016); Schlenkrich (2019)
Models of democracy	Habermas (1994); Strömbäck (2005); Held (2006); Fuchs and Roller (2018)
Variants of democracy	Held (2006)

This overview of the literature is not complete; it serves only to exemplify the diversity of terminology used both in different studies, but also sometimes in the same studies

Although democracy was widely supported in the United States in the 1960s, the way people thought of what democracy should be varied considerably, especially when looking at specific democratic ideas. Additionally, these variations were related to differences in income, formal education, region, and politically literate versus "the masses".

Another influential scholar was Rokeach (1968, 1974) who studied abstract democratic values (freedom, equality) and other political values (peace, national security) as part of his terminal values scale especially in the United States. But although he didn't use the term "democratic values", he argued in case of freedom and equality that "it would be especially helpful for the understanding of public opinion on political issues if we were regularly to assess the relative importance of *freedom* and *equality* in our respondents and to relate these to whatever political opinions are under consideration." (Rokeach 1968, p. 558). He thereby underlined the importance of studying the relationship between democratic values and other political attitudes.

A revival of this research took place in the 1990s when scholars like Thomassen (1995) or Fuchs (1999) analyzed democratic values not only in the United States, but also in other Western democracies. But they often focused more on abstract democratic values like freedom and liberty than return to more specific questions as those scholars before did. However, their comparative studies showed that people in democracies varied concerning in their views on what kind of democratic values are important in a democratic system. The work by Schaffer (1998) switched the perspective because he clearly focused on meanings of democracy.

Since the 2000s more scholars have been working on this topic, thereby adding more terms to the debate (see Table 1). These terms are related to different phenomena under study. Scholars who focus on measuring the quality of democracy or engage in theoretical discussions often use terms like "models", "profiles" or "types". Some of them use scientific concepts of democracy that serve as baseline models for measuring variations of democracy, which are closely related to one or several understandings of democracy. Studies that focus on people, citizens, or elites—mostly through surveys—often use terms like "meanings", "understandings", "notions", "conceptions", "conceptualizations", "views" or "perceptions".

All these terms are more or less clearly used in the literature. Quaranta (2018, pp. 860–861) defines meanings of democracy, to begin with, as "a 'cognitive orientation', i.e. 'beliefs' about democracy are included" (Almond and Verba 1963). "These beliefs basically concern what citizens think democracy is and they allow their views of it to be revealed." According to Bratton (2010, p. 107), one could

assume that *meanings of democracy* are self-definitions of democracy, i.e. the respondent's definitions of democracy. Or it can be called a "self-defined characterization of democracy" (Bratton 2010, p. 107). In sum, meanings of democracy have an associative or intuitive touch, without normative alignment and "encompasses a range of standards, some of which are in tension or matter more to certain people than to others" (Schaffer 1998, p. 10).

Meanings of democracy are distinguished from *understandings of democracy* by the fact that understandings of democracy individually mean different representations of a still identical object and continue to enable uniform measurement, while meanings allow for conceptual ambiguity, ambivalence and contestedness (Schaffer 1998; Weiß 2020). Shin and Kim (2018, p. 228) argue that *understandings of democracy* can be understood as the cognitive aspect of democracy.[1] This means it consists of two dimensions:

a) the identification of what democracy is and therefore identify the essential properties of democracy;
b) "to differentiate the democratic regime properties from those of its authoritarian and other alternatives" (Shin and Kim 2018, p. 228).

As understanding suggests a specific definition of a concept, scholars can therefore test in general if respondents (or other scholars) have the same or a different understanding based on the attributes and their relationships mentioned, which goes beyond the comparison of democracy and autocracy. *Understandings of democracy* can be related even to different "models of democracy" (Held 2006) or ontological "theories of democracy" (Schmidt 2019). Scholars speak for example of democracy as liberal democracy, social democracy, or participatory democracy. These are all "classical subtypes" (Collier and Levitsky 1997) or "regular subtypes" (Lauth 2009) of the concept "democracy", especially in the context of democracy measurement.

As can be seen in Table 1, scholars also use more specific *conceptions* in the field of *meanings* and *understandings of democracy*. These too define certain subtypes, e.g. "popular understandings", "popular conceptions", "normative conceptions", "populist conceptions", "citizens' models", "informed understanding", "liberal notion", "liberal understanding", "authoritarian notion". These subtypes refer either to specific social *groups* (citizens, populations), specific *models* (liberal, authoritarian) or to specific *qualities* (informed). Distinguishing these subtypes helps us to compare for example citizens' and elites' meanings of democracy (e.g. Oschlies 2013). Another term would be concepts of democracy. Schaffer's (1998) argument summarizes that speaking of concepts of democracy may be misleading, as it "would suggest that a consensus exists about the way membership or rule should be understood" (Schaffer 1998, p. 10). He (Schaffer 1998) denies the existence of this consensus and instead refers to the term meanings of democracy.

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[1] Quaranta (2018, p. 860–861) defines the meanings of democracy as "a 'cognitive orientation', i.e. it involves their 'beliefs' about democracy (Almond and Verba 1963). These beliefs basically concern what citizens think democracy is and they allow their views of it to be revealed." For us, this cognitive aspect is more related to the term understanding than meaning.

Notions or views of democracy refer somewhat more vaguely to ideas of what a particular concept should be. They nevertheless have a basic normative approach in that they are closely linked to value orientations that suggest what kind of reality people would like to live in. And since values can be defined as specific, we can read their normative orientation and with it a normative claim on the concept of democracy based on it.

The literature encompasses a diverse use of all these terms without applying them as differentiated as, for example, in Schaffer (1998). Our differentiation in the next section is based on a selection of categories that allows a further clarification of the terms *meanings* and *understandings of democracy*.

4 A framework to differentiate meanings and understandings of democracy

In the search for precise terms we are in favor of a differentiated use of meanings of democracy and understandings of democracy. Therefore, we suggest seven possible key categories in Table 2.

4.1 Key question

When studying meanings of democracy, we ask "What do *you* mean by democracy?" or, in a more abstract way, "What does X think democracy is?". In the context of mass or elite surveys, focus groups or other sorts of interviews, we would ask the respondent about his or her definition of the term democracy. This question is open and does not use predefined ideas to classify the answer as right or wrong. When we study understandings of democracy, we ask "What is (liberal, social, direct, etc.) democracy?" or "What characteristics are part of (...) democracy?". This question suggests that we—as researchers—have a specific understanding of democracy, e.g. a liberal understanding of democracy. And then we ask people how they define it, or we look at writings or speeches and check how they define (liberal) democracy.

Table 2 Criteria to distinguish between meanings and understandings of democracy. (Own compilation)

	Meanings of democracy	Understanding(s) of democracy
(1) Key question	What do you mean by democracy?	What is (liberal, social, direct, etc.) democracy?
(2) Focus	Intuitive, affective	Cognitive
(3) Constructivism vs. positivism	Constructivist	Positivist
(4) Relativism vs. universalism	(More) relativistic	(More) universalistic
(5) Perspective	Subjective	Objective
(6) Intension vs. extension	Intension	Extension
(7) Inductive vs. deductive	Inductive	Deductive

4.2 Focus

Meanings of democracy are more *intuitive* or *affective*, whereas understandings of democracy focus on the cognitive aspect. In order to understand local meanings of democracy a "thick" description is needed—a description that is bound to circumstances and embedded in deeper structures of meaning (Schaffer 2014). "If we are to investigate seriously how people understand such terms, then we need an approach that provides people opportunities to articulate the connections that they themselves make between meanings, the complexities that they themselves grapple with, and the conceptual puzzles that they themselves have not been able to solve" (Schaffer 2014, p. 328 f). The realization of this research goal can only be achieved with a methodological approach that enables people to engage intuitively and affectively with abstract concepts of what democracy is like. The condensation requirements imposed by survey instruments, for example, leave little room for people to articulate their thoughts (Schaffer 2014), since they address *cognitive* skills of knowledge acquisition or agreement.

4.3 Constructivism vs. positivism

Studying meanings of democracy implies arguing from a *constructivist* perspective. Constructivism is the idea that "the manner in which the material world shapes and is shaped by human action and interaction depends on dynamic normative and epistemic interpretations of the material world" (Adler 1997, p. 322). In this perspective there is not one reality, but numerous constructed realities. This means, in line with the exploration of the meanings of democracy, that there is not "one" democracy, but many mental or real constructions of democracy.

Studying understandings of democracy implies arguing from a *positivist* perspective. "Positivists generally work within a realistic epistemology", which can be understood as a general framework or set of constraints that allows questions about truth and justification to be answered (Dessler 1999, p. 124). Thereby a specific understanding of democracy is formulated and tested empirically, which is possible both on the micro level (surveying if people have a specific understanding of democracy), on the meso level (studying if political parties support a specific understanding of democracy) or on the macro level (studying the specific democratic profiles of countries).

4.4 Relativism vs. universalism

This leads to another significant differentiation of both concepts—*relativism and universalism*. The *relativist* position assumes that people always perceive the world from social contexts and judge it accordingly. According to this view, cultures have a profound influence on people's perception and judgement. These culturally different ways of perceiving reality prevent all people from considering the same norms to be correct, such as democracy (Zapf 2016). The study of the meanings of democracy implies a more relativistic view of democracy, in which there is no fixed

benchmark. Everything can be associated with democracy, even non-democratic characteristics.

Universalism is based on a number of premises (all human beings are equal, have the same cognitive abilities and can therefore think about appropriate norms), which lead to the conclusion that there is a universal capability—namely reason—with the help of which humans can recognize their nature and, based on this, norms. From this, the conclusion is then derived that there are norms that should apply to all people, that all people are equally addressed and that are in principle comprehensible to all people, like democracy (Zapf 2016). The study of the understanding of democracy implies a more universalistic view of democracy in that the formulation of one (or more) specific understanding(s) of democracy is a prerequisite for its empirical evaluation.

4.5 Perspective

Concerning the perspective, the key question is "Who defines what democracy is?". Concerning meanings of democracy, the respondents or units of analysis like politicians, parties, etc. define what democracy is. This is a quite *subjective* perspective, instead of the more *objective* perspective, in which experts define what democracy is. The expert (e.g. a political scientist) says what democracy looks like and uses this definition as a benchmark to check if people or countries share this (or better: his/her) understanding of democracy.

4.6 Intension vs. extension

Thinking of Sartori's (1970) ladder of abstraction, we can use both *intension* and *extension* of concepts to describe the two concepts. When we analyze meanings of democracy, we focus on *intension*. The empirical results we get are not comparable and not quite representative. But they help us to describe the thinness or thickness of the concepts defined by respondents and others in their views. When we study understandings of democracy, we focus much more on *extension*. By defining a specific understanding of democracy, we can then test it on a large basis of respondents or countries or other units of analysis. Of course, thinness and thickness of the postulated concept plays a key role for the analysis. The number of necessary and sufficient properties of defining democracy is critical for the way we can study it empirically.

4.7 Inductive vs. deductive

The diversity of methods can be differentiated into two different research strategies[2]:

a) *inductive* approaches,
b) *deductive* approaches, and
c) mixed approaches.

We want to leave aside the distinction between quantitative and qualitative designs because the literature shows that both methodological traditions can be helpful in different ways for all three research strategies. The *inductive approach* is a classic bottom-up strategy. Here, empirically detectable (real existing) meanings of democracy in the sense of a grounded theory can be recorded. In our view, the inductive approach is closely related to studying meanings of democracy.

The *deductive approach* is a top-down strategy. Here, a specific understanding of democracy can be assumed from the outset and measured by different methodological approaches. This enables the analysis of the support of different democracy models (e.g. liberal democracy, social democracy) in different spatial and/or temporal contexts.

We are aware that the proposed dichotomies in some of the categories cannot be assigned as clearly as the table suggests. However, such a clarification of terms is needed to initiate a process of reflection on the phenomena under study, the aims of the research, and the findings we use for comparisons.

5 Contributions of the special section

In accordance with the field of research outlined here, the special section aims in particular to strengthen the discussion on methods for measuring meanings and understandings of democracy and to bring together some thematic research on this topic.

In sum, this special section contributes to the following two key points. First, it provides some considerations for combining research strategies and conceptual approaches to position the studies in the debate on the meanings and understanding of democracy. Second, all contributions deal with different aspects of the challenges mentioned above, as they discuss theoretical questions on conceptualization, expand knowledge about survey research by offering new theory-based conceptualizations based on new (Baniamin 2020) and existing (Wegscheider and Stark 2020) items. In addition to the use of qualitative interviews (Frankenberger and Buhr 2020), they introduce new methodological approaches from psychology (Osterberg-Kaufmann and Stadelmaier 2020) and linguistics (Dahlberg et al. 2020) which underlines the

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[2] There is also a third possibility, namely mixed approaches that combine both inductive and deductive reasoning. Ideally, this is an interplay of both strategies in the sense of a hermeneutic spiral of knowledge gain. This could be a stepwise process by first inductively studying the meanings of democracy of people or elites and then using these findings to construct different models of democracy based on the properties mentioned by the respondents. These models can then be used, for example, in large scale surveys to test their empirical relevance.

importance of interdisciplinary research. The studies also vary according to regions (World: Wegscheider and Stark 2020; Europe: Dahlberg et al. 2020; Frankenberger and Buhr 2020; Africa: Baniamin 2020; Asia: Osterberg-Kaufmann and Stadel-maier 2020) and different political levels (local level: Osterberg-Kaufmann and Stadelmaier 2020; regional level: Frankenberger and Buhr 2020; national level: Wegscheider and Stark 2020; Baniamin 2020; Dahlberg et al. 2020).

The special section is divided into two sections, which are centrally oriented on the methodological approach. The first section deals primarily with the understanding of democracy and thus follows a more deductive approach.

The first part starts with the paper of *Hasan Muhammad Baniamin* (2020) and it focuses on the discrepancy between the subjective and objective assessment of the level of democracy in Africa. Whereas on the basis of the data from Afro-Barometer 5, a large number of Africans are convinced that they live in a demo-cratically governed country and are also satisfied with its organization, the experts' assessments differ considerably, as they classify a large portion of the countries as deficit democracies or even authoritarian regimes. Thus, in his multi-level analysis, he argues that it is not worth measuring the level of democracy on the basis of public perception because it is misleading for the actual assessment of democratic satisfaction. He tries to explain this discrepancy through an alternative measurement of orientation towards the state (*rights seekers vs. privilege seekers*) and examines how this orientation affects their perception of the state and its leadership. His chapter concludes that this type of orientation can indeed function as a layer of belief that influences the cognitive system with which they evaluate the political system under which they live. People who have rights seeking nature tend to be critical of the state, especially when there are governance-related problems like corruption. On the other hand, privilege seekers focus more on performance indicators such as management of the economy and reduction of crime.

Carsten Wegscheider and *Toralf Stark* (2020), the authors of the second contribu-tion, also address the individual evaluation of democratic performance. In contrast to Baniamin, however, the authors argue that a valid assessment of democracy per-formance depends above all on citizens' knowledge of democracy and the country's level of democracy. It is important not only to know which components belong to a democracy, but also to recognize non-democratic characteristics. In their multi-level analysis, they clearly show that citizens who have a distinct democratic knowl-edge but live in a country with a low level of democracy evaluate the democratic performance more negatively. Conversely, the higher the level of democracy in a country, the better the evaluation of the performance of the democracy by citi-zens with a high level of democratic knowledge. These findings together with the results of Baniamin show that there is an urgent need for a more comprehensive survey of citizens' knowledge of democracy in order to investigate meanings and understanding of democracy.

This leads us to the second part of the special section, which is dedicated to the research of the meanings of democracy by applying inductive research logic. In this field of non-survey research *Rolf Frankenberger* and *Daniel Buhr* (2020) introduce their approach of measuring meanings of democracy from a phenomeno-logical perspective. Their key argument is that survey research produces incomplete

results in measuring meanings of democracy because the manner in which citizens define democracy is highly diverse and is significantly influenced by their own life experiences. Therefore, to examine the citizens' meanings of democracy, the applied methodological approach must take into account individual cross-references and interconnections to other topics of their lives. By using a qualitative multidimensional analysis based on 389 qualitative interviews, the authors can observe the so-called first-order meanings of politics, participation, and democracy individually and analyze their connection to each other. They can show that survey-based quantitative research has clear limits in terms of gathering such first order constructions. Therefore, it seems appropriate to use open, qualitative methods inspired by phenomenological methodology in order to get as close as possible to first-order subjective constructions of meaning in democracy.

The contribution by *Norma Osterberg-Kaufmann* and *Ulrich Stadelmaier* (2020) also argues for more differentiated or mixed methodological approaches to examine meanings of democracy. Their proposal is to combine the repertory grid and semantic differential methods. With the repertory grid method, the authors offer a completely new approach to transnational and intercultural research that provides new insights into international comparison and gains a more differentiated understanding of what democracy means to people. Its application to the Singaporean middle class is an impressive example of the individual meaning of democracy because it shows that their meaning of democracy contains the core elements of Western democracy, but that it is limited to a minimal understanding that includes only election. The final combination of the repertory grid method, which is rather an inductive/bottom-up approach, with the semantic differential method serves the attempt to use the results of the former for a deductive/top-down design in order to enable large *N* studies and thus increase representativeness.

Finally, the work by *Stefan Dahlberg, Sofia Axelsson* and *Sören Holmberg* (2020) focuses on a challenge in survey research that deals with comparability and measurement equivalence across languages, cultures and countries. By using a distribution-semantic lexicon, a statistical model for gathering information about the simultaneous occurrence of words from large text data, they test their assumption that words with similar meanings tend to occur in similar contexts and that contexts shape and define the meanings of words. Using text data corpora containing online web documents classified by country, language, and as social or news data, they can clearly show that the meaning of democracy varies regionally and culturally. While in Europe and English western democracy is primarily associated with an input dimension, there are clear differences with regard to religious imprinting. In Catholic Europe, for example, the value of community is valued much more highly than in Protestant Europe, where individual political freedoms and rights are important. Finally, the results of their study show that there are some common understandings of the concept of democracy, but also regional differences that comparative surveys cannot capture.

In summary, both the introduction and the five contributions to this special section contribute to improving research on meanings and understandings of democracy. They present answers to some of the challenges introduced at the beginning of this introduction, and also pose some new follow-up questions. It should have become

clear by now that research into the meanings and understandings of democracy helps us to gain a more comprehensive insight into the processes observed in political cultures and political regimes. But to improve the ongoing research in the field we have to build bridges between different theoretical and methodological approaches, open the discourse between western and non-western thought on democracy, and use this knowledge to build, for example, better methodological instruments that help us to broaden our insights into meanings and understandings of democracy.

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