

# Mélanges de la Casa de Velázquez

Nouvelle série

53-1 | 2023

50 years of Scholarship on the Southern European Transitions: A Comparative Approach

Dossier. 50 years of Scholarship on the Southern European Democratic Transitions: A Comparative Approach

## The Southern European Transitions to Democracy: A Historiographical Introduction



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### Résumés

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This text serves as an introduction to the dossier *50 years of Scholarship on the Southern European Democratic Transitions: A Comparative Approach* which aims to compare and contrast these processes in Greece, Portugal and Spain, as they unfolded during the 1970s and beyond. Our starting point is that the three Transitions were conceptually linked from the beginning as the vanguard of Huntington's famous "third wave" of democratic transitions, but there has been little substantive comparative historical research, especially considering all three cases together. To foster a more substantive comparative approach, the editors pursued a strategy of co-authorship around common themes, hoping this would facilitate deeper conversations across national divides and languages.

This introduction starts with a brief assessment of several generations of historiography, considering the genealogy of the Southern European "model" of transition, followed by an appraisal of several contributions that have either endorsed or challenged this early model. It then offers a description of the main arguments put forward by the contributors of the dossier, followed by a survey of other relevant debates and promising new directions. It concludes by encouraging further comparative research on the three cases, either as a single unit or in conjunction with other cases.

Ce texte sert d'introduction au dossier *50 ans de recherche sur les transitions démocratiques en Europe du Sud : Une approche comparative*, qui vise à comparer et à contraster ces processus en Grèce, au Portugal et en Espagne, tels qu'ils se sont déroulés pendant les années

1970 et au-delà. Notre point de départ est que les trois Transitions ont été conceptuellement liées dès le début en tant qu'avant-garde de la fameuse « troisième vague » de transitions démocratiques de Huntington, mais il y a eu peu de recherches historiques comparatives substantielles, en particulier en considérant les trois cas ensemble. Afin de favoriser une approche comparative plus conséquente, les éditeurs ont adopté une stratégie de co-rédaction autour de thèmes communs, espérant ainsi faciliter des conversations plus approfondies au-delà des clivages nationaux et des langues.

Cette introduction commence par une brève évaluation de plusieurs générations d'historiographie, en considérant la généalogie du « modèle » de transition de l'Europe du Sud, suivie d'une évaluation de plusieurs contributions qui ont soit approuvé, soit contesté ce premier modèle. Il propose ensuite une description des principaux arguments avancés par les contributeurs du dossier, suivie d'une étude d'autres débats pertinents et de nouvelles orientations prometteuses. Il conclut en encourageant la poursuite de la recherche comparative sur les trois cas, soit en tant qu'unité unique, soit en conjonction avec d'autres cas.

Este texto sirve de introducción al dossier *50 años de estudios sobre las transiciones democráticas en el sur de Europa: Un enfoque comparativo*, que pretende comparar y contrastar estos procesos en Grecia, Portugal y España, tal y como se desarrollaron durante la década de 1970 y posteriormente. Nuestro punto de partida es que las tres transiciones estuvieron conceptualmente vinculadas desde el principio como vanguardia de la famosa “tercera ola” de transiciones democráticas de Huntington, pero ha habido poca investigación histórica comparativa sustancial, especialmente considerando los tres casos conjuntamente. Para fomentar un enfoque comparativo más sustantivo, los editores siguieron una estrategia de coautoría en torno a temas comunes, con la esperanza de que esto facilitara conversaciones más profundas más allá de las divisiones nacionales y los idiomas.

Esta introducción comienza con una breve evaluación de varias generaciones de historiografía, considerando la genealogía del “modelo” de transición del Sur de Europa, seguida de una valoración de varias contribuciones que han respaldado o cuestionado este modelo inicial. A continuación, se describen los principales argumentos esgrimidos por los autores del dossier y se examinan otros debates relevantes y nuevas orientaciones prometedoras. Concluye alentando la realización de nuevas investigaciones comparativas sobre los tres casos, ya sea como unidad única o junto con otros casos.

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## ***Texte intégral***

# **Origins and Goals of the Dossier**

1 The three co-editors were approached by the Editorial Board of *Mélanges* to coordinate a dossier on the transitions to democracy in Portugal, Spain and Greece to celebrate the 50<sup>th</sup> anniversary of the end of the authoritarian regimes. All three of us were enthusiastic about the project, given the dearth of truly comparative current historiography. Despite the fact that these three Transitions were conceptually linked from the beginning as the vanguard of Samuel Huntington’s famous “third wave” of democratic transitions, there has been surprisingly little substantive comparative historical research, especially considering all three cases together<sup>1</sup>. On the one hand, there is still a basic assumption that these cases are related, but on the other hand, there has been little concerted effort to test this assumption after decades of extensive but largely autonomous historical research into each case. This special issue takes the Southern European “model” as its point of departure, re-evaluating it in the wake of almost four decades of historiography. In so doing, we also hope to open new lines of comparative analysis for the next generation of transition scholars.

2 After discussing various options on how to organize the dossier, we adopted a strategy of co-authorship around common themes instead of single-authored articles on each case. We wanted to avoid a series of parallel narratives written by specialists on each country, and facilitate deeper conversations across those national divides and languages. Thus, the editors identified what we viewed as major areas of historical research on the Transitions and asked our co-authors to collaborate in comparing and contrasting the parameters of each theme. Each article would then bring into

conversation the scholarship on each case and the co-authors would draw original conclusions about the state of the field and suggest future avenues of research. We briefly considered having three co-authors, but rejected this as too unwieldy and impractical, and decided to recruit an Iberianist and a Greek scholar for each essay. Finally, we picked English as the common language across scholars from all three countries. We are very grateful to all of the authors who accepted this challenging assignment, and whose fruitful collaboration has produced a unique comparative perspective on the Southern European Transitions.

## Generations of Historiography

- 3 In the immediate decade after the Transitions, political scientists aggregated the three cases into a Southern European “model” of transition. Building on Immanuel Wallerstein’s categorization of Southern Europe as a “semi-peripheral” region, the authors of a seminal volume sought to draw the neglected region into comparative political science models<sup>2</sup>. More importantly, they argued that the recent Transitions had, at long last, brought Southern Europe into the range of “normal” Western European patterns, a conclusion confirmed by a later volume that identified these new democracies as unique models of consolidation within dozens of the so-called “third wave” democratic transitions<sup>3</sup>. In Samuel Huntington’s schema, the first wave of democratization began after the revolutions of the late 18th century, while the second wave occurred after World War II. The third wave began with the transitions in Southern Europe in the mid to late 1970s, encompassed regime change in Latin America and Asia, and climaxed in Eastern Europe in the early 1990s<sup>4</sup>.
- 4 The Third Wave transitions that began in Southern Europe posed a conundrum because they didn’t seem to fit what had been the dominant “modernization” theory of democratization. As articulated in Seymour Martin Lipset’s seminal 1959 article, before a country could transition successfully to democracy it had to pass through certain stages of economic and social “modernization”, which could take generations<sup>5</sup>. The ideal model, in this case as in many, was Britain, which experienced a gradual, centuries-long transition, during which economic, social and political evolution were inextricably intertwined. Within this framework, democratization was the culmination of a long-term process, and was not expected to be universally accessible to all countries. But instead of a gradual long-term transition, the Southern European countries underwent political transitions to western-style democracies within a few short years.
- 5 To explain this apparent disconnect, political scientists turned their attention to the short-term decisions taken by individuals which resulted in the demise of the authoritarian regime and the establishment of a democratic one. Defined as the “elite agent” or “transitology” approach, the seminal text was the comparative analysis of O’Donnell and Schmitter. For O’Donnell and Schmitter, it was the legitimation crisis among authoritarian elites that initiated a process of “auto-transformation”. Through a pragmatic search for new options, the disenchanting authoritarian elites could undertake liberalizing reforms and eventually open negotiations with moderate regime opponents. If successful, these negotiations between authoritarian and opposition leaders would produce an agreement on a new set of “rules of the game.” These in turn defined the parameters in which a new set of democratic institutions could be “crafted”. In other words, the new transitology model emphasized the role of actors over structural changes and of contingency over determinism, of transitions as an uncertain space in which human agency, particularly that of elite political actors, was decisive. By the end of the 1980s, when another series of transitions from authoritarian rule took place in Eastern Europe, it was the Southern European “elite actor” model that was held up as the preferred road map.

6 At the same time that the model was consolidated, there was always an underlying tension between the Spanish and Portuguese cases. Coming from the post-hoc perspective of consolidated democracies, Philippe Schmitter used the term “equifinality” to conceptualize how countries can take radically different paths to the same general destination<sup>6</sup>. Their considerable differences had to be minimized in order to shoehorn them into the same interpretation; thus, at the outset, Portugal’s revolutionary rupture, set off by a colonial crisis that provoked a left-wing military coup in April 1974 that in turn unleashed a grass-roots popular revolution, could not have looked more different from Spain’s “pacted” transition between old regime and opposition elites. In fact, Spanish elites in 1975-76 viewed Portugal as a negative model to avoid, and the fear of “portugalization” was itself a stimulus for the famous Spanish “consensus”. The unitary Iberian model only functioned when the revolutionary period in Portugal was viewed as a temporary deviation on the road to the “normal” western European democracy that it eventually became.

7 The optimism that this model could be exported anywhere reflected the confidence that structural obstacles need not be an impediment to democratization if political actors made good decisions. However, it was precisely the fact that so few other democracies outside Southern Europe managed to consolidate that eventually undermined the conviction that elite agency had been the only key factor in their success. Thus, the faltering of democratic legitimacy in Latin America, the uneven consolidation in the ex-Soviet bloc and the virtual halt of the third wave of new democratizations after the early 1990s began to chip away at what had been the dominant theoretical approach in the 1980s. While few scholars would discount the importance of short-term elite decisions and “crafting” in precipitating regime change and constructing solid democratic institutions, most would now qualify that they are necessary but not sufficient to a successful transition and, even more so, to consolidation.

8 Instead, since the 1990s the trend has been to turn the spotlight on other factors—and other actors—in explaining and problematizing the Southern European transitions. In general terms, there has been a widespread critique of the “top down” view of transitions, both as an ideal model but also as a description of realities that were messier and more uncertain. Scholars have explored the Transitions “from below”, demonstrating that collective actors from the broader population—of men and women—were also active agents in proposing alternative and competing visions of a democratic future. Moving away from the short-term decisions of elites has also opened longer term perspectives on the origins and chronology of the Transitions, not only in terms of economic or political factors but also of cultural mentalities. Taking advantage of the trend towards transnational history, scholars have also sought to examine the impact of external forces, going beyond the superficial generalizations of “third wave” globalization contagion. A more recent trend in the scholarship, as the events themselves have faded into history, is to analyze the evolving memorialization of the Transitions and how memory has been mobilized for different purposes by each new generation. While all of these developments have enriched the scholarship on the Transitions, most of it has been rooted in the national case studies rather than in comparative analysis.

## The Articles

9 The opening article in the dossier, “From Dictatorship to Democracy: the Institutional Transitions. Transitions from above?”, by Ioannis Balampanidis and Maria Inácia Rezola, addresses some of the questions that have ever since, but perhaps with renewed intensity lately, been at the forefront of the historical debates on Southern Europe’s road to democracy. With a predominant emphasis on processes and

outcomes, the article starts by making a reference to two fundamental controversies. The first, which is perhaps more salient in the Spanish and Greek debates, involves a discussion on the effects of the trade-offs and compromises negotiated in the 1970s/early 1980s, namely, to what extent they were able to bring about a meaningful transformation of deep-rooted clientelist and authoritarian political cultures. In Spain, disenchantment with the political establishment, corruption scandals, social inequalities and mounting tensions between the central government and local nationalisms, has led many to question the “exemplary” nature of the Spanish Transition, including some of its most iconic figures, such as the monarch, Juan Carlos I, for long hailed as one of the patrons of the country’s successful conversion into a modern, prosperous and stable European democracy. Although some of Greece’s *dramatis personae* from the 1970s have long disappeared, the traumatic economic and social crisis experienced by the country after 2010 has rekindled a sort of soul-searching debate on the country’s path to modernity, which does not exclude an assessment of the political overhaul which accompanied the foundation of the Third Hellenic Republic.

10 The second controversy is perhaps more specific to Portugal, where left-wing revisionists do not hold the same grudges as their counterparts in Spain or Greece. This controversy has involved the suitability of the concept of ‘transition’ with regard to Portugal, since this both carries with it a sort of teleological assumption (the idea that the political and institutional outcome of 1976 was somehow “preordained”), and tends to underestimate the contingent, and highly conflictual, nature of the social and political process which unraveled from the fall of Caetano to the “corrective counter-coup” of the 25 November 1975, a point that also comes up in Cardina and Fytli’s article.

11 One strong idea of Balampanidis and Rezola is the inclusion of the Greek path to democracy in the “equifinality” formula originally coined by Schmitter to describe the parallel but idiosyncratic trajectory of the two former Iberian dictatorships. Their mode of testing this hypothesis involves a comparative approach to three key institutional developments: the issues related to transitional justice; the changing political and constitutional landscapes; and the prospect of European integration. Their article shows that a neat parallelism between the three cases is nowhere to be seen. The violent overthrow of the Estado Novo paved the way to a veritable state crisis that made the purging of the authoritarian vestiges of the past a much swifter and thorough business than in Spain, even if many on the left still think that there was too much leniency towards those implicated in the repressive apparatus of Salazarism in the post-1975 “democratic normalization”. In Greece, “dejuntification” may have left some sectors relatively untouched (the armed forces in particular), but trials of notorious figures from the Colonel’s regime did take place, as well as a significant “depuration” in the universities spearheaded by radicalized students. A substantially different setting was to be found in Spain, where the concept of “transitional justice” makes little sense in the light of the impunity granted to the perpetrators of human rights violations by the 1977 amnesty law. Spain is also a case apart when it comes to the persistence of the symbols of the authoritarian past in the public sphere (from street names to monuments), but the article stresses the persistent search for some measure of restorative justice in the last two decades undertaken by various groups of citizens, magistrates and politicians.

12 When comparing the institutional parameters of the three cases, the authors believe that “similarities are much more evident than differences”, even if some distinctions are worthwhile emphasizing. Once more, Portugal’s state crisis is a decisive feature. The collapse of old structures made room for all sorts of claims, utopias, as well as unprecedented experiences of civic engagement. Even if many did not survive the “hangover” of 25th November, their influence on the strong social bias of Portugal’s democratic regime was far from negligible. Led by elites who were mostly drawn from the centre-right in the foundational moments of their respective transitions, Spain and

Greece were also not spared from some episodes of “street pressure” or even armed violence—after all, this was a period when political terrorism was still quite widespread in Western Europe, from Ireland to Italy or West Germany.

13 Finally, a more unifying theme in the three cases is provided by the role played by Europe. Historians still discuss the real impact which the then European Economic Community may have had on the critical junctures of three Transitions. Even among significant sectors of the center-left there were misgivings about the nature and purpose of the EEC (most notably in Greece). But gradually such skepticism was won over: in an era marked by deep economic turmoil as in the 1970s and early 1980s, the benefits heralded by EEC membership were seen as key to ensure the stability of the three fledgling democracies, a point also discussed by Muñoz Sánchez and Balios in their article.

14 The second article explores one of the most important trends in scholarship since the 1990s, which has been to balance the institutional narrative with an analysis of the Transitions “from below”, through highlighting the participation and contributions of different groups of collective actors. As Nikolaos Papadogiannis and Pedro Ramos Pinto argue in their article, “Social change, protest and participation in Greece, Portugal and Spain”, the battle to take these collective actors seriously is largely over. Instead, recent scholarship continues to expand the scope of inquiry, in terms of the identities of the collective actors, the space and time of mobilization and the forms of protest. Their article highlights both common trends and important differences in the focus of each national historiography and issues a call for “conceptual cross-pollination” to enrich future research. One major distinction is that the Portuguese and Spanish historiography primarily looks back to the 1960s and 1970s for the role of social movements in destabilizing the dictatorships, while the Greek scholarship looks forward to the formation of new collective identities that emerged out of the Transition. To some degree, this difference seems to reflect overlapping but distinct chronological “cycles of protest” in each case. At the same time, there is a broader common trend to incorporate the transition cycles of protest into global and European narratives of the “Long Sixties”.

15 In all three cases, the first studies of social movements focused on the familiar collective actors of workers, students and women’s movements, although to different degrees. Thus, in Spain and Portugal, historians have made the case that all three groups were key actors in destabilizing the dictatorships and shaping the Transitions, while in Greece formal mobilization was limited until during and after the dictatorship, with some major exceptions. Spanish and Portuguese scholars have identified worker movements as influential “early risers” in the cycle of protest. Student movements also played roles in each case, as part of broader anti-authoritarian youth cultures in which political and cultural demands overlapped. Student movements emerged in the 1960s in all countries, but in Greece their emergence before the dictatorship turned them into a special target of repression. In contrast, feminist movements in Greece were only visible after the Transition. In addition, the scholarship on women’s movements in both Greece and Portugal has been much less developed than for the Spanish case, which has a wealth of studies on all kinds of women’s activism before and during the Transition. It appears that autonomous women’s movements were able to find more space in the Spanish Transition than in Portugal, where they were subsumed in the socialist and class focus of the revolution.

16 Beyond these classic collective actors, the bulk of recent scholarship has expanded its range of subjects, locations and modes of mobilization. More than simply adding new groups, current scholarship examines how and when collective identities are formed rather than looking for activism among pre-defined categories such as workers, students or women. In Spain and Portugal, historians have analyzed how the problems of local communities generated new collective movements of residents, mostly in urban neighborhoods. More recently, they have begun to focus on rural communities,

challenging the classic view of passive or static rural populations. Scholars have also dissected the activism of sectors and organizations linked to the Catholic Church in both Spain and Portugal, which was divided into a conservative top-down hierarchy and a more diverse grassroots sector influenced by Vatican II. Unique to Spain, however, was the mobilization of regional nationalists, while only in Portugal did radicalized sectors of the military form a social movement. Other collective actors that have been identified to some degree in all cases are non-heteronormative, disabled, migrants and refugees, all of whom demanded that their concerns be included in a more capacious understanding of the process of democratization. While protest cycles and collective actors differed across the three cases, the social movement historiography has transformed our understanding of the Transitions, expanding the chronological time frame, the parameters of the political debates and the number of relevant participants.

17 As part of the broad historiographical effort to move beyond narrow political narratives of the Transitions, the scholarship in all three cases has analyzed the Transitions from the perspective of gender norms, mobilization and legislation. As Teresa María Ortega López and Kostas Yannakopoulos make clear in the article: “Gender and the Transitions”, there were remarkable similarities across the cases. In response to the conservative and coercive gender and sexual norms of the dictatorships, the political transitions included only limited formal progress towards gender equity and sexual liberation, although gradual change began before the Transitions and continued in the decades after.

18 All three of the right-wing authoritarian regimes included “traditional” gender and sexual values as part of their ideological frameworks and key to coercive social control. Laws, norms and education systems tried to instill heteronormative and patriarchal roles for men and women in all three countries, although the longer time frame of the Portuguese and Spanish dictatorships meant that these gender systems were more deeply entrenched. The regimes all complemented propaganda and legal restrictions with punishment, imprisonment and even sexual torture for those who refused to conform.

19 At the same time, the article also highlights the gaps in these restrictive norms, either through direct resistance or as a result of gradually changing cultural attitudes. Given the repression, there were few organized feminist or gay or lesbian groups under the dictatorships, although Spain seemed to have more anti-regime women’s groups than the other two countries. Instead, women, and especially gays and lesbians, formed more informal oppositional and support communities, often connected with underground cultural spaces linked to transgressive music, art, publications and universities. At the same time, opportunities for women were slowly expanding, in terms of access to higher education and the work force, and sexual attitudes were shifting, despite the regimes’ efforts to keep them in their designated roles as housewives and mothers.

20 One of the striking common themes that emerges in the article is the limited role of gender and sexual liberation within the political opposition movements, both before and during the Transitions. Thus, most of the left wing and student movements were either openly *machista* and homophobic or content with generic rhetoric about gender equality. Women and homosexual individuals joined these movements but in subordinate positions for the former and closeted for the latter. It is therefore hardly surprising that during the Transitions, gay rights were not even on the table until the 1980s in any of the cases, while women’s rights were at best secondary concerns for the political parties managing the Transitions. There were some basic changes in formal political rights but no major “gender transition” accompanying the regime changes.

21 At the same time, the Transitions opened the door to greater mobilization of women and gays in organizations that advocated for their interests, although they were divided into multiple strands. Feminist organizations came first, although even these were often viewed negatively by the broader society. Moreover, in all three cases, feminists were

divided along similar lines that further marginalized their impact. One camp were the so-called “double militants”, who worked as feminists from within left wing organizations. The other camp rejected this orientation in favor of autonomous feminist organizations that would only focus on their issues. These divisions paralleled those in the feminist movements in the democratic countries but the difference is that they occurred at a moment of dramatic institutional transition when the parameters of democratic citizenship were being constructed from the ground up. Feminists also remained separate from gay and lesbian groups, unlike in West Germany and Italy, where there was more collaboration and overlap. Finally, it appears that there were few links between feminist and gay and lesbian movements across the three countries, although research is limited on this topic.

22 The next article, “Transnational and International Dimensions of the Transitions”, by Antonio Muñoz Sánchez and Sethelos Isidoros Balios, revisits another classic debate of the Southern European transitions: the extent to which these processes were influenced by external forces, and how decisive that influence may have been, especially when compared to the weight of endogenous factors. Their contribution features some of the canonical elements of a “high politics” approach (geopolitical considerations, role of state elites), but also brings in the concerns and methods of transnational history (the circulation of ideas and individuals at a sub-state and supranational level, the role of networks and non-state actors), which have experienced significant advances in the last decades.

23 While conceding that domestic imbalances and contradictions were the triggers of the collapse of the Iberian and Greek dictatorships, the authors are keen to show that external influences were far from irrelevant, especially in the political struggles that followed shortly after. Indeed, even if “smoking guns” attesting to the decisive impact of such external interferences in critical junctures are sometimes hard to find, the article makes ample use of recent historical literature (most of it based on primary sources declassified 30 years after the events) to make the case for a vision that takes into consideration the dialectical relation between the internal and external factors in the Southern European transitions. Their argument is persuasively put forward in several passages. For instance, when discussing the impact of the Cold War *détente* on the Portuguese and Spanish Transitions, they highlight the discreet, but critical role played by West Germany in bolstering the PS and PSOE, which would rather appear as the *protégés* of the European social democrats than as the lapdogs of the discredited (in the eyes of the Left) “imperialist” Americans. Their article is also a powerful statement in favor of a more “polycentric” reading of the Cold War, since the agency of lesser powers, such as the Western Europeans, or even of regional organizations, such as the EEC, is now taken much more seriously. In this respect, with its “revolutionary” Transition, Portugal became a more fluid and unpredictable arena, and it is still not clear, as the authors recognize, to what extent the Communist Party’s behavior in 1974-75 may have been decisively shaped by Moscow’s strategic priorities. Another innovative aspect of Muñoz Sánchez and Balios’s contribution is their comparative and “entangled” analysis of the three Transitions, with the more precocious Portuguese and Greek processes exerting a “demonstrative” effect on the Spanish one. Following closely the reciprocal gazes of the Spanish and Greek political actors and media, for instance, they manage to trace the impact which events in one country had on the other (the fate of the Monarchy, or the rise of the PASOK as the dominant party after 1981).

24 Finally, as in the institutional transitions’ article, Muñoz Sánchez and Balios pay considerable attention to the role of “Europe”, partly as synonym of the EEC and the Council of Europe, but also as a watchword for “progressive modernity”, in the outcome of the three processes. In addition to highlighting the commitment of the two large European political families of the late 1970s (the Socialists and Christian Democrats) in the setting up of “certified” counterparts in the Iberian Peninsula and Greece, they also stress the effective use of the mechanism of “political conditionality” to bring about a

not too distant “Mediterranean enlargement”. With some subtlety, the European leaderships realized that the best way to achieve their goal was to have popularly backed governments in the three countries pursuing European integration as relentlessly as they could, with only some occasional nudging from Brussels.

25 “From History to Memory: Representations of Regime Change in Portugal, Spain and Greece”, by Magda Fytili and Miguel Cardina, analyzes the memory debates and mnemopolitical disputes that have been another major field of controversy and collective soul-searching vis-à-vis the Transitions. In their attempt to pinpoint “mnemonic signifiers”, as they note, they trace the evolution of collective memory vis-à-vis democratization over time, pointing out that the varying degrees of memorializing or “museumizing” the past was often commensurate to the nature and afterlives of the transitional settlements themselves (a *revolution*, a *restoration*, and a *pacted transition*, respectively—in their view). For instance, the fact that Franco’s image continued to be in public display through remaining statues with the Caudillo on horseback, most of which were only removed as late as in 2006, points at the stark differences between the Spanish, on the one hand, and the Portuguese and Greek case, on the other, in which symbolic or commemorative references to the dictators were duly banned from the public sphere as soon as the regimes ended.

26 The two authors look at the “politics of memory” or “politics of silence”, as they succinctly put it, tracing the distinct nature of the memory debates and battles in both the late stages of the regimes and the “long” transitions in the three countries. There are, in fact, major issues that have been kept in silence in Portugal, Greece and Spain: the Portuguese colonial wars, the Cyprus question, and the Spanish Civil War and its aftermath, respectively. The authors claim, however, that, in contrast to Portugal and Greece, where these open national traumas have not been adequately addressed, in Spain—hitherto the “black sheep” of memory politics in post-authoritarian societies—the painful civil war experience has indeed fed into heated public debate on history and memory in the past fifteen years.

27 While the two authors pinpoint that “pacts of silence” of sorts exist in all three cases regarding these troubled pasts, “this did not prevent the return of some restless ghosts”, as they duly note. In order to trace the evolution of remembrance in these societies, Fytili and Cardina look at an array of different manifestations of memory, from official commemorations and street toponymy to documentaries, and from public monuments, statues and museums, to associations of veterans, implying that the ghosts still struggle to find a hospitable memory. The Aljube Museum in Lisbon, Freedom Park in Athens and the association connected to it, and the Historical Memory Law in Spain, are three parallel forms of attempting to provide official recognition of the effects of the repressive mechanisms established by the three regimes and to some extent rehabilitate the memory of the victims. Once again, the absence of an official recognition of the importance of anti-Francoist resistance in Spain (further complicated by ETA [Euskadi Ta Askatasuna], GRAPO [Grupos de Resistencia Antifascista Primero de Octubre], and FRAP [Frente Revolucionario Antifascista y Patriota] evolution from resistance organisations to full-fledged terrorism in transitional and post-transitional times) differentiates the Spanish case from Portugal and Greece, whereby anti-dictatorial action was recognised and honoured by the respective post-authoritarian democracies as an integral part of the heroic struggle against fascism.

28 Fytili and Cardina’s overview traces the parallel evolution of the various governments’ memory politics in post-transitional times in the three cases from the 1970s through well into the 21st century, highlighting the interrelation between the ideological prerogatives of governments in office and politics of remembrance. They crucially point out a permanent tension between the *elites* and the *demos* regarding the politics of the past—a fact encapsulated in the tension between certain dates, such as 25 April versus 25 November in Portugal, namely the beginning and the abrupt end of the revolutionary process—as well as 17 November versus 24 July in Greece, namely the

transition from “below” versus the one from “above”, which the chapter showcases convincingly. This tension found its culmination in the direct manifestation of the social movements that emerged in 2011 around the “acampadas” (occupations of public squares) during the political and economic crisis of the “Great Recession”.

29 The process of memorialization in all three countries is far from concluded, as the article points out, and controversies over the contested past continue to be integral parts of standard political antagonism. Here it would be worth adding the public history work exercised by *Cuéntame cómo pasó* [Tell me how it happened, 2000], a Spanish series that looks at the landslide events ranging from late Francoism and the Transition to democracy onwards, through the lens of an “average” family. The concept is currently experiencing a re-adapted afterlife in Greece with *Ta καλύτερα μας χρόνια* [Our best years, 2020]. Both series have been praised and rejected alike, for their capacity to penetrate facets of everyday life under dictatorship and transition, and for their tendency towards aestheticisation and nostalgia, respectively. At the same time, the first Netflix-Series produced in Portugal, entitled *Gloria* (2021), depicts the period of late Salazarism, touching on the aggressively violent facets of the regime both in terms of its colonial conflict and its internal affairs. It would be worth thinking of the ways in which such forms of fictional representation converge with and diverge from the burgeoning academic literature on these Transitions (and their lacunae) and the ways in which they build certain pervasive narratives on the past, affecting the general imaginary on the dictatorships, their afterlives and the memory thereof.

30 The last article, “Close, yet different. The Southern European transitions of the 1970s revisited”, by Victor Fernández Soriano and Diego Palacios Cerezales, deals with the core of this triple exercise in comparative historical juxtaposition and transnational connection. The authors depart from the premise that instead of comparison leading to either clustering or differentiation this exercise in juxtaposition should point out both similarities and differences. In order to dissect them, the authors focus on three neglected—albeit obvious—dimensions: who belongs to the nation and partakes in the body politics; the means deployed to express political choices (election, referenda, demonstrations); and the transformation of the political apparatus, including legacies of authoritarianism, administrative changes, and the rights of citizenry.

31 Just like Papadogiannis and Ramos Pinto, the two authors insist on the crucial importance of social movements and politics “from below” in instigating institutional change, in fact likening them (especially Spain) to the 1989 moment of change. They conclude that mass demonstrations either spontaneous or carefully choreographed, acclamatory or contestatory, invariably played an actual and a symbolic role in reinserting the great masses into the body politic in the wake of the Transitions. They thus asserted the respective civil societies’ centrality in the three countries’ democratic awakening.

32 Even though they too employ Schmitter’s “equifinality” premise, they do it differently from other authors in this special issue, highlighting how the various contributors might differently apply otherwise shared concepts. Contrary to Balampanidis and Rezola, for instance, Palacios and Soriano stress the highly different symbolic baggage of each individual case and the disparities, rather than convergences, in both intentions and outcomes. The authors stress particularly the distinct role of institutional changes for the body politic, thus bringing in dialogue the disparate intellectual traditions and political practices of the three cases, scrutinizing the evolutions of institutions such as the police and the military. They dissect post-transitional policing, as well as the impact of referenda on crucial issues, ranging from constitutional breakthroughs to plebiscites on the nature of the political systems. Spain steadily stands out in the narrative, appearing as the one case mostly relying on referenda as a political means to achieve the end of democratization, but also showing reluctance in pursuing legal purges of the previous regime, be it in the military or in the police and security forces, despite the steady democratization of the latter. Palacios and Soriano, in fact, adopt a rather

“revisionist” stance vis-à-vis the Spanish case, arguing for a firm demilitarization of the police force—thus positioning themselves against the idea of post-authoritarian continuities in repression, despite occasional backlash.

33 Given the range of subjects and perspectives represented in the six articles, it shouldn't be surprising that there are no simple conclusions to be drawn. It is clear that there are no “recipes” for best transitions, nor a consensus on the relative weight of different factors in shaping the origins and trajectory of the Transitions. The classic transitology paradigm minimized the differences among the cases by emphasizing the similar outcome of a liberal democracy integrated into Western Europe, summed up in the term “equifinality”. But with the shift to multiple factors and a longer-term chronology of origins, scholars have been more focused on the divergent paths to reach equifinality. From this perspective, there is a mix of opinions among the authors as to whether the three transitions are more similar or more different. Still, most of the authors reject the “exceptionalist” rhetoric that sometimes informs the scholarship on individual cases, while recognizing that there were differences. One question that hangs over the dossier is the continued usefulness of the Southern European framework as a bounded unit of analysis. To some degree, the dossier is informed by Huntington's original formulation of the Southern European transitions as inaugurating the “third wave”, which sidelines other possible comparisons, with the 1940s or with other European countries in the 1970s. The concept of “Southern Europe” as a peripheral region that “joined” Western Europe reifies both of these identities instead of acknowledging a more fluid, diverse and intersectional “Europe”. In any case, the dossier is intended to open new lines of inquiry and encourage more comparative analysis rather than to propose a new model or framework.

## **Beyond the Dossier: Other Themes and New Directions**

34 The issues discussed by the articles of the dossier cover a range of themes that have generated significant historiographical inputs, but it is important to acknowledge other relevant debates that have populated the field in the last two decades or offer promising new directions.

35 First it is important to acknowledge that there are debates that are specific to each national case, like the central role of decolonization in Portugal, or the territorial division of the state in Spain, or the special relationship between Greece and Cyprus, which do not easily fit into a comparative framework. Moreover, the structure of Spain's autonomous communities has provided an impulse to explore the local and sub-national dimensions of the Transition, which has not been as present in the other cases. In each national case, there has been exploration into the cultural and social aspects of the Transition, but with distinct emphases. Finally, the construction of narratives has followed a distinct path in the three cases, with the Spanish case being the most conflictive and the Greek one the most consensual, although the 2008 crisis has had an impact in re-visiting the “meaning” of the Transition in all the cases.

36 From the perspective of Portuguese historiography, the old truism of history being written by the winners has found its expression in the disproportionate attention devoted to the elites who masterminded the overthrow of the dictatorship and were the key protagonists of the revolutionary process which culminated in the establishment of a Western style parliamentary democracy, albeit with a strong social and even statist flavor. In recent years, however, a significant body of scholarship has thrown new light on institutions and actors which were seen as relatively peripheral in relation to this outcome. Three of them have attracted a fair amount of research: the Church, the radical right and the ‘returnees’ from the former African colonies.

37 Rightfully considered as one of the main pillars of the dictatorship, the Catholic Church has been the subject of intense historical scrutiny, with historians trying to find out to what extent the *aggiornamento* made possible by Council Vatican II may have encouraged the emergence of dissent within Catholic circles in Portugal and how far this eroded a key constituency of the Estado Novo<sup>7</sup>. The discreet role played by the Church in the political struggles of the Transition is explained either by a widespread awareness of the latter's complicity with the dictatorship, as well as by the cautious stance adopted by its hierarchy, which did not preclude it from playing a very effective backstage role in upholding the Socialists and other conservative forces, particularly in the most critical phases of 1975<sup>8</sup>.

38 Even if a strong conservative Catholic party failed to emerge in revolutionary Portugal, those who saw the revolution as an "ungodly" work of communists were able to enter the fray by circulating their own propaganda and intimidating the PCP and the radical left with armed violence. A much clearer picture of their somewhat "shadowy" political underworld has now emerged, with historians explaining the subsequent fading of this radical right with the ability of the moderate, centrist parties to incorporate an anti-communist rhetoric which resonated with a significant sector of the electorate<sup>9</sup>, including the nearly-half a million 'returnees' from the former African colonies, many of them deeply embittered with the way decolonization had been settled.

39 Interestingly, research on the social composition of this latter group has shown that they were not the caricature of the unrepentant *pieds-noirs* that refused changes to the colonial status quo. They formed a constituency which sustained a highly critical opinion on the liquidation of empire, which is usually pointed to as the "least positive" aspect of the revolution in surveys conducted since the late 1970s<sup>10</sup>. However, they were not behind the rise of a far-right movement like their counterparts in France—in fact, they seem to have distributed themselves among the moderate democratic parties in a fairly balanced way<sup>11</sup>.

40 The fact that many Portuguese seemed eager to embrace the opportunities offered by the country's accession to the EEC, not least the improvement of their living standards and patterns of consumption, may help to explain why a meaningful "imperial reckoning" was never conducted. The loss of the empire and its consequences have been absent from much of the accounts of the democratic transition in Portugal, and the historiography of decolonization has mostly developed within the confines of "imperial history". Only recently can we discern a greater interest in the social and cultural impacts of decolonization in metropolitan Portugal, as well as on the legacy of colonialism on present day "racial relations". Symptomatically, many of the first scholarly works which addressed the persistent influence of "Luso-Tropicalism", i.e., the "unofficial" ideology of the Estado Novo's late colonialism, in twenty-first-century Portugal, belong to international scholars who seemed better equipped to spot such continuity and underline the absence of a proper imperial reckoning<sup>12</sup>.

41 The Spanish historiography on the Transition also has its own internal dynamic, with debates and avenues of research specific to the national context. The most striking development since the economic and political crisis a decade ago has been the warring narratives of a "failed" or "successful" Transition that have been incorporated into current public sphere debates about the state of Spain's democracy today<sup>13</sup>. Although these debates have pushed the Transition to the forefront of historical research, the impact on the historiography is not always salutary. Thus, a lot of effort goes into controlling the narrative of "failure" or "success" instead of continuing to dig into what was obviously a more complex, contradictory and multifaceted process.

42 At the same time, there are plenty of fruitful avenues that do continue to open up new perspectives. One promising line of research has been to decentralize the Transition narrative with local studies, particularly focused on rural regions<sup>14</sup>. The classic "pacto de elites" narrative focused almost exclusively on national political figures and parties

in Madrid, and even the newer studies of the transition “from below” have highlighted social movements in the larger urban centers. There has been more research on what one might call the regional or sub-national histories of the Transition, particularly in Catalonia and the Basque Country, where alternative national identities, parties and institutions further complicate any single national narrative<sup>15</sup>.

43 Another line of research which seems to be particularly well-developed in the Spanish case is the cultural history of the Transition. There is a wealth of research on the channels of cultural diffusion, from television to the press and the arts, and their impact in transforming popular culture and sociology<sup>16</sup>. More broadly, the interdisciplinary field of cultural studies has explored the role of “cultural frames” in shaping expectations, perceptions and political decision-making<sup>17</sup>. One promising approach is to bring the tools of the history of emotions to better understand how different sub-groups of the population experienced the Transition process. On a more general level, the recent generation of scholars has increasingly emphasized the role of fear and violence as a feature of a transition that was once thought to be “peaceful” and “consensual”<sup>18</sup>.

44 What all of these avenues of research point to is a more complicated, interdisciplinary, decentralized understanding of the process that fruitfully undermines totalizing interpretations of the Transition, which seem to be particularly emotionally charged in the Spanish case. As symbol and touchstone, the Transition will continue to be re-framed for the needs of each successive generation, but scholars also need to be conscious of where they situate themselves in the evolving dynamic between history and memory.

45 In Greece there seems to be less tension than in the other two cases around the Transition and more consensus around its relatively swift and “smooth” outcome. Historians have focused on Prime Minister Konstantinos Karamanlis’s charismatic role in navigating the Transition with powerful statesmanship<sup>19</sup> and in securing the country’s entry in the EEC<sup>20</sup>. Others tackled the transitional process (Gr. Μεταπολίτευση [Metapolítefsi])<sup>21</sup> either addressing the entire era that it heralded as a continuum<sup>22</sup>, or the transitional moment that encompassed major changes<sup>23</sup>.

46 Recently scholars started to historicise the Greek transitional justice and the trials of the so-called ringleaders of the 1967 *coup d’état*, either defending their pioneering nature, praising Karamanlis’ statesmanship, or criticizing their setbacks<sup>24</sup>. The subjects of youth culture during the transitional years<sup>25</sup>, as well as gender and sexuality, received renewed attention<sup>26</sup>. Some recent works focused on the booming industrial action and workers’ movements<sup>27</sup>, while others focused on the violent side of the Greek Transition, mainly on behalf of leftist armed organisations<sup>28</sup>. More recent works focus on the rituals of resistance on behalf of the extraparliamentary Left and the burgeoning anarchist scene<sup>29</sup>. Moreover, recent rethinking of the institutional Left’s reaction to the Transition posed the question of why the latter renounced the political capital it had gained from the anti-dictatorial struggle which could lead to more radical politics<sup>30</sup>—a critique which remains more marginal than its equivalent in Spain<sup>31</sup>.

47 The unresolved nature of the Cyprus conflict and the events that led up to the Turkish invasion and beyond, remain an open historiographic field<sup>32</sup>. Alexis Papachelas’ recent journalistic account of the 1974 invasion based on declassified US documents (2021) also triggered discussions on the nature of the Transition, bringing to light hitherto unknown material regarding the CIA’s alleged role in the events and showcasing the fragility and extreme contingency of the entire transitional process<sup>33</sup>. Different, though related contributions to the “long transitional” period and its documents (or lack thereof) focused on the Greek Transition’s “coda” in 1989 and the consensus among political elites in burning millions of secret police files, involving information on major transitional players of the Left<sup>34</sup>.

48 Most recently, an attempt has been made to look at the *Metapolítefsi* from the point of view of literature<sup>35</sup>. Less structured but equally interesting attempts have been made

by cultural studies and/or cinema specialists<sup>36</sup>, while the art history of the transitional period is at a quite early stage in Greece<sup>37</sup>. Such debates have thus far failed to turn into full-fledged, Spanish-style academic battles, even though the 2009/10 economic crisis did trigger an intense interest in the transitional past.

49 Finally, although the authors of this historiographic survey are not in the possession of a crystal ball to predict how research on the three Southern European transitions will evolve in the coming years, we can point to questions that deserve further comparative investigation.

50 One issue is to expand the comparison on continuities with the previous authoritarian regimes. In all three cases there has been some reluctance in engaging more fully with trends, initiatives and policies launched by the latest incarnation of the regimes and later developments (including the latter's 'modernising' policies and their connections with business elites and their agendas). It would also be critical to see how much the public policies of the new democracies (social insurance, economic and fiscal policy) relied on continuity rather than rupture with the previous regimes. How did the democratic forces use existing institutions or ideas to transform them? Lastly, continuities in the cultural sphere or in social movements is also a direction worth taking into account. Taking this a step further: which were the continuities, apart from the ruptures, in terms of everyday life but also the history of emotions?

51 On the transnational front, which will most likely continue to expand in the coming years—what is the influence of exiles/expatriates and emigrants in the making of democratic (and 'European') Portugal, Spain and Greece? Also, what connections were there between these expat communities in the 1960s and 1970s? Can we talk of connected histories and entanglements or common contours? Another field that would allow for more future research would be transitional justice, a case par excellence for transnational comparison. Was the dismantling of the authoritarian structures an important factor for the "quality" of the new democracies, like the Portuguese one? And what difference did it make that Greece applied transitional justice while Spain did not?

52 Considering periodization and geography would be another way of thinking about the Transitions in the future. Can we think of the long Transitions: for instance, when did they start and end? And which are the longitudinal effects of transitions, how can they be measured, and would it be possible to apply a path dependency approach to the transitions?

53 The articulation between the local, national, and global is another direction that will be worth expanding: how did social and political change take root? Looking not just at the impact of the gradual European integration of the three countries but also at the impact of the three Transitions on the European Economic Community would be an avenue of research. A possible focus here would be the opening up of new markets and free trade areas but also the impact of a brief re-energizing of the belief in democratic change and 'representative democracy' through institutional/peaceful means, in line with the renewed focus on Human Rights.

54 In terms of challenging the "Southern Europe" unit of analysis, future transnational comparison might also include both existing European democracies and non-European democratizing countries. In particular, Italy in the 1970s was a country plagued by political violence and *coup d'état* scenarios but also characterized by thriving social movements in that decade. The same might apply to other mature democracies, such as France, the United Kingdom and West Germany, which had to deal with mounting labor conflicts and political violence in the post-68 environment. Might the integration of the history of these countries into a wider European history serve as a correction to the 'exceptionality' of Southern Europe and a break-away from the canon of the "third wave" as coined by Samuel Huntington? In this respect, and beyond Eurocentrism, a comparison of Portugal, Greece and Spain with Turkey or Latin American countries in the 1970s would also be fruitful in order to avoid the idea of a complete fault line between democracies and dictatorships in global trends like "the 1960s" and "the

1970s”.

55 From a different transnational geographical perspective, a return to the colonial connections between all three cases, comparing developments in the former Portuguese colonies, Spanish Equatorial Guinea and Western Sahara, and the largely understudied case of the Cyprus imbroglio in 1974 would bring a new perspective to the study of transitions. This change of focus would re-connect the three case studies to the Near East, the Eastern Mediterranean, and Africa.

56 Zooming in to delve into the local or regional dimension would be a further fruitful avenue for future research. On the one hand, comparative analysis could focus on the dynamic between high politics and social movements in the local context, especially outside of major cities. On the other hand, the Transitions in local governments as a feature of democratization have barely been studied. Given the great asymmetry between the development of local studies in Spain (on account of resources/stimuli by the regional authorities) and the situation in Portuguese and Greek historiography, it would be interesting to see how this develops.

57 If each Transition has its “consensual memories”, then the passing of time will most likely continue to unsettle them, as contributions to this dossier make clear. We have seen how in the case of social history the dimensions of gender and sexuality, for instance, have acquired greater salience in recent years. The willingness to reconstitute the trajectories of those who for some reason were pushed to the margins of the “grand narratives” is likely to grow in the foreseeable future. In general terms, comparative research could identify the differences and similarities between the “losers” in each Transition, and how these populations shaped the future trajectory of the democratization process.

58 What seems clear is that the comparative analysis of the three Southern European political transitions deserves continued attention by scholars. Whether Southern Europe remains a single unit of analysis or includes other cases, the benefits of stepping back from national historiographies and exceptionalisms is always a fruitful endeavor. To this end, we hope that this dossier inspires a new generation of historians to revisit, challenge and revise the Southern European “model”.

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## Notes

1 There has been some comparative scholarship on Spain and Portugal, but very few including Greece, perhaps because of the language barrier. PINTO, 2013; FISHMAN, 2019; CAVALLARO and KORNETIS, 2019; RADCLIFF, 2016; GONZÁLEZ FERNÁNDEZ, 2015, 2016; KORNETIS, 2022 and forthcoming; JIMÉNEZ REDONDO, 2009; LEMUS, ROSAS and VARELA, 2010; PRADA RODRÍGUEZ, 1997; GONZÁLEZ MARTÍNEZ, 2018.

2 O'DONNELL, GUILLERMO, SCHMITTER and WHITEHEAD, 1986; PINTO and MORLINO, 2010.

3 STEPAN and LINZ, 1996.

4 HUNTINGTON, 1991.

5 LIPSET, 1959.

6 SCHMITTER, 1998.

7 BARRETO, 2002; ALMEIDA, 2008; REVEZ, 2009.

8 CRUZ, 1996/97; MATOS, 2001.

- 9 MARCHI, 2017; 2020.
- 10 MAURÍCIO, 2011.
- 11 PIRES, 1987. See also KALTER, 2022.
- 12 SIEBER, 2002; REITER, 2005, 2008; SAPEGA, 2008; BUETTNER, 2016.
- 13 CASTELLANOS LÓPEZ and ORTIZ HERAS, 2016.
- 14 QUIROSA-CHEYROUZE MUÑOZ and FERNÁNDEZ AMADOR, 2010; DAVIS, 2014; ORTIZ HERAS, 2016; GONZÁLEZ MADRID, 2012; HERRERA GONZÁLEZ DE MOLINA, 2007.
- 15 MOLINERO, 2014; MURO, 2011; LANERO TA-BOAS, 2013; NÚÑEZ SEIXAS, 1999, 2013.
- 16 QUIROSA-CHEYROUZE MUÑOZ, 2009; LLOVERAS and SALGADO DE DIOS, 2014; CASTRO TORRES, 2010; MARTÍN DE LA GUARDIA, 2008; ALBARRÁN, 2018; DE HARO GARCÍA, 2010, 2016.
- 17 AGUILAR, 1996; QUAGGIO, 2014; EDLES, 1998.
- 18 BABY, COMPAGNON and GONZÁLEZ CALLEJA, 2009; CASANELLAS, 2014; CASALS, 2016.
- 19 SVOLOPOULOS, HATZIVASILEIOU, 2005.
- 20 KARAMOUZI, 2014.
- 21 For a historicization of the term, KALLIVRETAKIS, 2017.
- 22 VOULGARIS, 2001; AVGERIDIS *ET AL.*, 2015; VAMVAKAS, PANAYIOTOPOULOS; KOSTIS, 2021.
- 23 NIKOLAKOPOULOS *ET AL.*, 2016.
- 24 For early appraisals see ALIVIZATOS, DIAMANDOUROS, 1997; later on SOTIROPOULOS, 2010; more recently ALIVIZATOS, 2017; CHATZIVASILEIOU, 2022; for a critique CHARALAMBOUS, 2017.
- 25 PAPADOGIANNIS, 2015; GLYSTRAS, 2020; KORNETIS, 2021.
- 26 YANNAKOPOULOS, 2015; MAIS, 2015; PAPANIKOLAOU, 2018.
- 27 ALEXANDROPOULOS, 2010; VAMIEDAKIS, 2018.
- 28 KASSIMERIS, 2011; KARAMPAMPAS, 2017.
- 29 GLYSTRAS, 2020; KATSAPIS, 2020; TSIOMAS, 2021.
- 30 KARPOZILOS, 2019.
- 31 RODRÍGUEZ, 2015; WILHELMI, 2016.
- 32 KIZILYÜREK, 2019.
- 33 PAPACHELAS, 2021.
- 34 KARAMANOLAKIS, 2019; SIANI-DAVIES, KATSIKAS, 2009: On the notion of transitional “codas” see FISHMAN, 2019.
- 35 DIMITRAKAKIS and NATSINA, 2021; NIKOLAKOPOULOU, 2022; TZIOVAS, 2022.
- 36 PAPANIKOLAOU, 2018.
- 37 HAMALIDI, 2015.

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## ***Pour citer cet article***

### *Référence électronique*

Pamela Radcliff, Kostis Kornetis et Pedro Aires Oliveira, « The Southern European Transitions to Democracy: A Historiographical Introduction », *Mélanges de la Casa de Velázquez* [En ligne], 53-1 | 2023, mis en ligne le 14 avril 2023, consulté le 11 mars 2024. URL : <http://journals.openedition.org/mcv/18531> ; DOI : <https://doi.org/10.4000/mcv.18531>

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## ***Auteurs***

### **Pamela Radcliff**

University of California at San Diego

### *Articles du même auteur*

**Carme MOLINERO, Pere Ysàs (coords.), *Construint la ciutat democràtica: El moviment veinal durant el tardofranquisme i al transició*** [Texte intégral]

Paru dans *Mélanges de la Casa de Velázquez*, 42-1 | 2012

**Kostis Kornetis**  
Universidad Autónoma de Madrid

**Pedro Aires Oliveira**  
Universidade Nova de Lisboa

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