

## Subnational Politics: An Emerging Research Agenda

Jayane dos Santos Maia<sup>1</sup>  
Thais Cavalcante Martins<sup>2</sup>

8 *All politics is local.* This is the title of the book that describes the political trajectory of Democrat Tip O'Neill, the only US politician to serve consecutively during five legislatures (1977-1987) as Speaker of the US House. In his political biography, O'Neill says he heard from his father, "All politics is local. Don't forget that." when he lost the first election he ran for. His father could not have been more correct. Political participation and influence, as well as coming to power, exercising, and maintaining it depend on articulations and human relationships established at the local level, whether represented by a house, an office, a family, a neighborhood, or a city.

Voting, the main instrument of political participation in a democracy, although an individual decision, is also a choice that takes place within a place and a context. As stated by Palmeira and Heredia in the book *Política Ambígua* (2010, p. 19), "relatives or not, people relate to each other, daily, through multiple exchange

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<sup>1</sup> Researcher at the Global and Area Studies Institute (GIGA - Institute of Latin American Studies) and a Doctoral candidate in Political Science at the University of Erfurt (Germany). Member of the academic committee of the Brazilian Research and Studies Center (BRaS – University of Würzburg). Orcid: <https://orcid.org/0000-0002-7877-2057>. Website: <https://www.giga-hamburg.de/en/the-giga/team/maia-jayane>. E-mail: [jayane.maia@giga-hamburg.de](mailto:jayane.maia@giga-hamburg.de) / [jayane.maia08@gmail.com](mailto:jayane.maia08@gmail.com).

<sup>2</sup>PhD in Political Science from the Federal University of São Carlos (UFSCar). Member of the academic committee of the Brazilian Research and Studies Center (BRaS – University of Würzburg). She is currently a postdoctoral researcher at the Centro de Estudos SoU Ciência at the Federal University of São Paulo (UNIFESP). Orcid: <https://orcid.org/0000-0003-4595-1849>. E-mail: [thais.cmaartins@gmail.com](mailto:thais.cmaartins@gmail.com).

flows that link them to each other, confirming or not preexisting relationships (...)”<sup>3</sup>. Surely that is what O’Neill’s father knew when he gave his son the most valuable lesson for him to succeed in politics.

As a discipline that studies the dynamics of power as well as the organizations and institutions that are the cause and effect of the political system, Political Science could not disregard the local – or micro – aspect of its main object of study: politics. However, the study of subnational politics in the discipline has long been characterized by a spatial inequality that was revealed in the academic environment. While there has been a long standing tradition among American and European scholars of focusing on the subnational level in political analyses, on the Latin American continent it was only more recently that subnational elections came to be considered more systematically in studies of party systems (DOSEK and FREIDENBERG, 2013). Although theoretical and methodological ties – which we manage in more detail below – have not been completely broken, subnational research is evolving, i.e., it is an emerging research agenda, especially in Latin America.

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This special issue is inspired by the recent efforts of several researchers around the world to place subnational politics at the center of academic debate in Political Science. It is undeniable that in recent years there has been an increase, albeit modest, in the publication of both books and articles with a subnational focus on Comparative Politics (GIRAUDY et al., 2019). A recent example is the publication of the book *Inside Countries: Subnational Research in Comparative Politics* (2019), which highlights the theoretical and methodological gains of using the subnational perspective in various fields of comparative research. Another illustration is the book *Handbook of Territorial Politics* (2018), which emphasizes the relevance of territorial units that form national boundaries in shaping a community’s social, economic, and political life.

Despite these efforts, the emerging character of subnational studies does not seem to be short-lived and its institutionalization as a research agenda remains undefined. We identify two reasons for this. First, aware that the consolidation of a

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<sup>3</sup> Original Portuguese passage: “parentes ou não, as pessoas relacionam-se, no dia a dia, através de múltiplos fluxos de trocas, que as vão vinculando umas às outras, confirmando ou não relações preexistentes (...)” (PALMEIRA and HEREDIA, 2010, p. 19).

research agenda does not occur overnight and requires its advocates to convince the scholarly community of its relevance to the area, attentive researchers must justify why we should care about events at the subnational level. For better or for worse, the demonstration of the scientific relevance of an object of study occurs through its contribution to the theoretical construction of the field. As Pierre Bourdieu indicates, “the more famous scientists become, the more ‘theorists’ they become”<sup>4</sup> (BOURDIEU, 2014, p. 46), so that, according to him, the elevation of the theory above empiricism works as an obstacle to progress of the social sciences. Regarding this argument, we can add the second reason for the obstacle to the advancement of subnational studies: the widespread hesitation of academia to autonomize the subnational level as *an object of study* capable of contributing useful theory.

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When we look more closely at academic efforts dealing with the subnational level, we find that both the object of study and the rationale for the existence of numerous investigations still refer to the national level. This implies that the consideration of subnational entities – states, provinces, municipalities, regions, territories, etc. – in investigations in Political Science, especially in Comparative Politics, is sometimes only valid, interesting, or useful if it pertains to the variation or explanation of large-scale phenomena, that is, of national scope. As a result, researchers who seek to comparatively analyze what happens at the subnational/local level see the case study methodology as the only feasible way to do so and/or often construct a *puzzle* or a justification that includes the national level.

On the one hand, one cannot neglect the national-subnational relationship within a country – that is, a multi-level relationship, especially when it comes to politics, as the levels of government are unequivocally dependent upon each other, whether it has to do political competition or public policy, for example. On the other hand, Political Science as a discipline suffers from two vices that limit it and have in common placing the national level in a prominent place at the expense of the subnational level.

First, one must consider the existence of what we can call theoretical nationalism in political analysis, in which the spotlight is on theories, concepts, and

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<sup>4</sup> Original Portuguese passage: “quanto mais célebres ficam os cientistas, mais ‘teóricos’ se tornam” (BOURDIEU, 2014, p. 46).

approaches applied to national phenomena, which are commonly inappropriately transposed to local phenomena. The origin of theoretical nationalism resides in the implied idea that subnational politics would simply be a reflection of national events (SUÁREZ-CAO et al., 2017).

The term “second-order elections” to designate subnational/local elections relates not only to the assumption that such elections would be considered less important by voters – which would explain, for example, the low levels of voter turnout (KOUBA et al., 2020; LEFEVERE and AELST, 2014; SCHAKEL, 2014) but also to the deliberate initiative of researchers to measure the relevance of elections by considering their impact on the national executive power: elections that do not have a direct impact on the control of the national executive power are “second” rather than “first order” (FREIRE, 2010; REIF and SCHMITT, 1980).

Second, theoretical nationalism is the root of methodological nationalism already pointed out by several authors (DOSEK and FREIDENBERG, 2013; SCHAKEL, 2013, 2017; SUÁREZ-CAO et al., 2017; WIMMER and SCHILLER, 2002), that naturalizes the national level and large-scale events as a unit of analysis. The search for Political Science to differentiate itself from other disciplines such as History, Philosophy, and Sociology forced it to create universal empirical concepts, which would be achieved by increasing the number of case studies (BONAVIDES, 1967; SUÁREZ-CAO et al., 2017).

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Added to this is the common difficulty in gathering data at the subnational level – due either to the lack of organization of data or lack of transparency, which is yet another reason for the nationalist lens of the discipline. Thus, generalization and quantitativism have become crucial to delimit the frontier of knowledge between Political Science and the other Social Sciences. Generalizing and quantifying are commonplace in Political Science and go hand in hand with the national focus commonly attributed by the discipline to its objects of study.

Theoretical and methodological nationalisms negatively affect the production of *multilevel research* as well as (and even more so) *subnational investigations* that aim to understand (“only”) the subnational/local reality without guiding a relational perspective between levels of government. The autonomy of the subnational level as an object of study and unit of analysis has been undermined by the idea (which exists not only in Political Science, by the way) that the production

of knowledge takes place only through generalizations that consist “in attributing to a totality what was observed in a limited number of individuals or singular cases” (THIRY-CHERQUES, 2009, p. 623).

In the case of Political Science, it is usually generalized from top to bottom: the uniqueness lies in what is observed at the country level, while the subnational entities that form their totality are left with the definitions, perspectives, and interpretations that come from above. The idea that “good theories should ideally explain the outcome in all cases within the population” (MAHONEY and GOERTZ, 2006, p. 230) represents the view that is shared by most political scientists and diminishes the relevance of the subnational level in the discipline.

In this sense, the rule so far has been that the specificity of the subnational-local is of little or no use for the construction of theories but contributes methodologically to the advancement of the field by helping to select case studies or explaining comprehensive national phenomena. Thus, the recent emergence of subnational studies in Political Science is closely linked with the discipline’s modest shift toward qualitative approaches and methods (SUÁREZ-CAO et al., 2017).

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Although it cannot be said that Political Science has left its quantitative roots, the triangulation of methods or mixed methods, i.e., the combination of quantitative and qualitative research techniques, has gained space in recent years. Nevertheless, the qualitative character of the research, which usually comes in the form of case studies, appears in the background: it is usually an appendix to the quantitative analysis. This is because, when making use of method triangulation, researchers commonly perform two separate analyses – quantitative and qualitative – that are not articulated with each other, that is, they do not complement each other in answering the research question (SEAWRIGHT, 2016).

Considering all the theoretical and methodological resistance that prevents the subnational level from being a protagonist in the field of Political Science, we can point out distinct roles that it plays in studies that do consider it in some way. Taking a general look at these investigations, we determined that the subnational level appears in a number of differing ways so that its inclusion can be divided into four categories, which are summarized in Table I.

**Table I. Ways of including the subnational level in Political Science**

Categories	Definition	Applications
Methodological resource	Subnational level (states, provinces, municipalities, cities) as a unit of analysis for investigating national phenomena as an object of study	Studies on electoral geography, party nationalization, the impact of district magnitude, public policies
Explanatory variable	Subnational phenomena as independent variables that explain national phenomena	Studies on the legislative behavior of federal deputies, the role of subnational elections in voter preferences
Multilevel relationship	<i>Top-down</i> approach: national > subnational	Studies on federalism, <i>coattail effects</i> , vertical relationships between national and subnational elections, the influence of governors in the national sphere, opposition, and authoritarian regime
	<i>Bottom-up</i> approach: subnational > national	
Autonomy of the subnational level	Subnational level as the main object of investigation	Studies on subnational democracy (representative and participatory), <i>reverse coattail effects</i> , state legislative assemblies

Source: Authors.

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The first category, represented by the subnational territorial units within a country, includes subnational events as a unit of analysis for investigating national or large-scale phenomena. In this case, the subnational level is used as a methodological resource to examine the territorial variation, or the repercussion of a given phenomenon at the national level. Studies dealing with electoral geography illustrate this approach, such as the works of Silva and Davidian (2013) and Braga et al. (2012), in which spatial patterns of candidacies are evaluated considering data for federal legislative elections in Brazil.

Works dealing with disaggregated data from national elections to verify levels of party nationalization (JONES and MAINWARING, 2003) or the influence of district magnitude on national results (LUCARDI, 2017) also contribute to this approach, as well as those that analyze the variation in the implementation of national public policies and their effects at the subnational or local level (FISHER, 2013; NIEDZWIECKI, 2016). Fisher (2013), for example, creates the concept of

*boomerang federalism* to explain how cities in the United States began to receive federal transfers for the implementation of public policies related to climate change.

The second category of inclusion is characterized using subnational phenomena as independent variables to explain phenomena that occur at the national level. This stream of research comprises works that investigate the legislative behavior of parliamentarians at the national level based on subnational attributes (GERVASONI and NAZARENO, 2017; KIKUCHI and LODOLA, 2014; TAVITS, 2009). Tavits (2009), for example, sheds light on the local ties of parliamentarians in five parliamentary democracies in Europe to explain their degree of party discipline in parliament. Likewise, analyzing the Argentine case, Kikuchi and Lodola (2014) indicate that senators who are part of the provincial governors' parties and have a successful trajectory at the subnational level are more likely to break partisan unity and act more autonomously in the parliament. Studies that explore the role of subnational elections in electoral preferences at the national level also illustrate this approach (BECHTEL, 2012).

14 Multilevel studies that focus on the impact that events at the national level have on the subnational level and vice versa represent the third category of inclusion. On one hand, generally speaking, research on the causes, consequences, and *modus operandi* of federalism can be included here, as they deal with the aspect of the division of political authority between levels of government (BENTON, 2009; ERK and SWENDEN, 2010; FENWICK, 2015; HAMANN, 1999). On the other hand, in multilevel research in Political Science we can identify two subcategories of inclusion at the subnational level.

The first subcategory is characterized by a *top-down approach* to research in which the repercussion of national events in the subnational/local sphere is analyzed. The literature on *coattail effects* exemplifies this approach insofar as it emphasizes the effects of national elections on subnational or second-order elections (BORGES and LLOYD, 2016; GADJANOVA, 2019). Research that deals with the effects of vertical competition and political and electoral systems on the subnational electoral landscape are also included here (BORGES, 2010; CHHIBBER and MURALI, 2006; MORGENSTERN and SWINDLE, 2005; RIBEIRO and BORGES, 2020).

The second subcategory includes studies that use a *bottom-up approach*, from which the analysis of the subnational context and phenomena at the local level contribute to the understanding of what is happening at the national level. In this case, the subnational level is not a mere explanatory variable of national phenomena, but an object of study that when analyzed is related to the national level to clarify macro events and interactions, refining valid theories and methodologies for this level. This approach is illustrated by research that investigates how opposition parties use local elections to gain electoral strength and challenge authoritarian regimes at the national level (ESEN and GUMUSCU, 2019; LUCARDI, 2016). These studies point to the importance of subnational political dynamics in the democratization process of a country. In addition, investigations that assess the influence exerted by governors and local public policies on the national scene also represent the *bottom-up approach* (GERVASONI and NAZARENO, 2017; REMMER and WIBBELS, 2000) .

15 Finally, in the fourth category of inclusion, the subnational level is positioned as the sole protagonist and subnational phenomena constitute the object of investigation. Studies that adopt a genuinely subnational perspective – which differs from a multilevel relational perspective – are divided into several areas of Political Science but remain a minority. Studies on subnational regimes that assess the levels of democracy and electoral competitiveness in states and provinces, especially in Latin American countries, stand out (BEHREND and WHITEHEAD, 2016; GERVASONI, 2011, 2016; GIRAUDY, 2010; URIBE, 2020) as well as studies that verify the impact of local initiatives such as participatory budgeting in strengthening subnational democracy, understood in this case from its participatory aspect (ABERS, 2000; ALLEGRETTI and HERZBERG, 2004; AVRITZER, 2005; CHIKEREMA, 2013).

Also included here are the few studies that deal with *reverse coattail effects*, that is, the impact of gubernatorial elections on local elections (HOGAN, 2005; MEREDITH, 2013). Although research on subnational regimes and local representative democracy is not as common in Brazil as it is in Argentina, for example, studies on the determinants of voting and re-election in Brazilian states and municipalities (AMARAL and TANAKA, 2016; ARAUJO JR and PIRES, 2020; CAVALCANTE, 2015; FERNÁNDEZ et al., 2018) and state legislative assemblies and



their deputies (CASTRO et al., 2009; MELO, 2011; TOMIO and RICCI, 2012) have an outlet in Brazilian academia and characterize this autonomous form of inclusion. at the subnational level.

We argue that the effort to think about the place, or rather, the places of the subnational level in Political Science is necessary not only to organize the knowledge that comes from subnational studies, but also to think about strategies that place the subnational on an equal footing with the national level as an object of study. Although classifications are often considered simplistic and reductionist categorizations of reality, they are certainly useful for comparing information and identifying gaps in theoretical and methodological production.

In the case of the classification proposed herein, although the four categories of inclusion of the subnational level in Political Science are not mutually exclusive, since there is a possibility that the works can be based on more than one of the perspectives presented in Table I, it is evident that the subnational level rarely appears alone: in three inclusion categories it is somehow linked to the national level. We can say that in most studies the subnational/local level is an appendix to the description, analysis, and explanation of what is observed nationally.

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Going against the traditional research agenda characterized by theoretical and methodological nationalism, the objective of this special issue is to aggregate and give visibility to studies that analyze different political aspects at the subnational level. In this sense, the special issue adds to the growing efforts to make subnational research more than emergent. The contributions that make up this special issue fall particularly into the fourth category of inclusion of this level in studies in Political Science, that is, the subnational level is understood as an object of autonomous study. In addition, the articles also share one of the main characteristics of subnational studies today: they focus on the theme of democracy in Latin America.

Although it took time for subnational research to enter the field of Latin-American Political Science, the diversity and growing dynamism – or rather, unpredictability – of politics within the countries of the continent situated it as a reference in subnational studies, notably when it comes to politics of subnational democracy, a topic that is gaining a larger footprint in the discipline. Thus, all contributions in this special issue infuse some subnational political aspect that

contributes theoretically, methodologically, or empirically to the advancement of research on subnational democracy.

The article by Sandoval that opens the special issue deals with the theoretical, methodological, and empirical challenges arising from the growing investigation of subnational regimes, a theme that, without a doubt, most characterizes studies dealing with subnational democracy. Using a critical analysis of the bibliography produced on the subject and empirical evidence from Argentina, Brazil, and Mexico, the author points out that the historical trajectories of subnational entities are crucial factors for understanding the heterogeneity of subnational regimes, already identified by several authors.

Arguing that the variability of subnational regimes has roots in the past far earlier than the period of the third wave of democratization, the author urges his peers to consider time and space in describing and explaining levels of subnational democracy. Sandoval's article reveals constructive criticism of studies on subnational democracy that have also given in to Political Scientists' desire to build quantitative models that comprise all variables for the explanation of a phenomenon, which results in generalizations that disguise historical specificities. relevant subnational entities. As the famous sociologist Pierre Bourdieu states, "(...) as history is linear, the starting point, in a way, commands the entire succession" (BOURDIEU, 2014, p. 73)<sup>5</sup>.

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Palacios et al.'s contribution follows and is part of an innovative theme within subnational studies and particularly relevant to the Latin American context, although still little explored: political violence and democracy. Based on the analysis of the Colombian case and using documentary data sources, the authors investigate how different forms of political violence that combine in time and space impact electoral and party competition at the subnational level. The findings reveal how the struggle for power and territorial control at the subnational level makes use of different political uses of violence to shape electoral competition, benefiting local political (and criminal) elites and excluding, or rather, wiping out local opposition.

The authors illustrate in exquisite detail how the pervasive political violence – and, consequently, the armed and drug trafficking groups – are distributed at the

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<sup>5</sup> Original Portuguese passage "(...) sendo a história linear, o ponto de partida comanda de certa maneira toda a sucessão" (BOURDIEU, 2014, p. 73).

subnational level and act precisely in periods when democracy is trying to emerge from the depths. Considering that Latin American countries are marked, each in their own way, by contexts of political violence that involve power struggles between drug traffickers, paramilitary groups, and political parties, the article by Palacios et al. is an invitation to reflect on the territoriality of this reality that plagues democracy in the region.

In the next paper, Peixoto et al. analyze local elections and discuss the determinants of the re-election of mayors in Brazilian municipalities in the 2016 election. As reelection is a tool from the democratic context that entails the exercising of accountability, it works as a mechanism of retrospective evaluation of those who are in charge and may result in the incumbent being either punished or rewarded for his first term performance (MAIA, 2013; NICOLAU, 2006). Therefore, attempts to explain why a candidate manages to get reelected or not are valid to point out which elements voters consider when retrospectively evaluating the incumbent.

18 In this article, Peixoto et al. undertake to put institutional, socioeconomic, and individual variables in the same model to explain the probability of reelection in the municipalities. More specifically, the authors seek to verify if and how the management and individual characteristics of the representative, as well as political, economic, and demographic features of the reality of the municipality, influence their chances of being reelected. The relationship found between the mayor's management regarding education and health policies and the chance of reelection is especially interesting. While education spending does not significantly impact the mayor's re-election, the increase in health spending shows the opposite effect. Peixoto et al. shed light on the relationship between Brazil's federative structure and accountability to explain this finding: the degree of diffusion of the implementation of public education and health policies influences the view of whom voters blame for bad or good management in these social areas.

Silva et al.'s contribution adds a valuable discussion on the relationship between media and democracy. Analyzing the emblematic case of the state of Maranhão in Brazil, which was ruled for decades by members of the same family (the Sarneys), the authors investigate, on the one hand, how TV Mirante – the largest media conglomerate in the state, which is owned by the Sarney family – has acted in

recent years regarding the coverage of political affairs, considering that since 2015 the state has been governed by the opposition. On the other hand, they examine the strategies implemented by the current state government to insert their agendas into broadcast journalism.

The article is an empirical contribution to the reflection on the role of the media in the functioning of democracy. The influence exerted by the media on public opinion through its power of agenda can not only bias the citizens' views on certain issues but also – and more seriously – undermine the existence of the opposition, which is fundamental for a democratic regime. The results of the analysis of the interviews conducted with the professionals of TV Mirante and with the employees of the Secretariat of Social Communication and Political Affairs of the government of Maranhão reveal more than a clash between the notion of impartiality and bias in the production of the news. They point to a reflection on the consequences of the omnipresence of political families in various sectors of society.

19 In the last article of the special issue, Almeida brings to light the still little explored debate on the internationalization of public policies in the subnational arena. Almeida's article illustrates one of the criticisms raised in the first pages of this introduction regarding the everyday use of the subnational level as a methodological resource in the analysis of national public policies. In Almeida's article the subnational level is the object of study, analyzing how it relates to the international scenario in the context of the creation and implementation of local public policies.

From the bibliographic analysis and the selection of case studies that illustrate how the internationalization of public policies occurs in practice at the subnational level, the author elucidates why and how subnational entities seek resources, partnerships, and resources autonomously and independently of the national level, and instead seek assistance in the international arena to find solutions to their public problems. Almeida sheds light on the Brazilian federative structure and the advantages of decentralization in the country for the establishment of international partnerships and the implementation of public policies, especially in times of crisis when the steadiness of the federal government cannot be counted on.

In the Political Science Agenda section we are honored to have the article by Jacqueline Behrend, a renowned researcher in subnational democracy. In the article, which is a theoretical contribution to the field of study on political dynasties in democratic regimes, Behrend proposes a conceptual framework to enable the comparative study of political dynasties in subnational executives in different countries and offers a set of explanations related to their existence. As a phenomenon that prevails at the subnational level, the definition of political dynasty conceived by Behrend revolves around the figure of the governor and refers to family succession in the state executive, which can be pinpointed at three levels: same surname, common relative, or marital ties. In addition, seeking greater conceptual precision, Behrend distinguishes political dynasty from two other terms that equally characterize the Latin American reality: political family and nepotism. Then, she critically presents structural and institutional factors that support the existence of subnational dynasties.

20 Behrend's article is an exquisite contribution to studies on democratization and subnational democracy, especially when it comes to authoritarian enclaves or subnational hybrid regimes. The conceptual refinement proposed by her brings to light the need for reflection and greater academic production on the profile of political elites and their accommodation at the subnational level. Furthermore, her contribution invites us to question the extent to which Latin American countries, for example, are republics of families that hold power based on the influence they exert at the local level.

Finally, for the Interview section we had the honor of interviewing the eminent researcher Flavia Freidenberg on a topic that could not be left out of this special issue: gender and political reforms at the subnational level. Given that studies on women's entry and participation in the subnational political scene are still scarce, we invited Freidenberg to speak with us about the trajectory and evolution of policy reforms aimed at expanding women's participation at the subnational level. The interview touches not only on institutional and structural aspects that illustrate the progress made in recent times in terms of the entry and permanence of women, in subnational politics particularly, but also discusses the causes and effects of resistance (and violence) suffered by them in this context, presenting strategies for building an egalitarian political environment.

The publication and reading of the interview become even more necessary when we see the alarming increase in recent years of political violence against women at the local level in several Latin American countries. In the municipal elections in Brazil in 2020, according to a report by the Electoral Observation Mission of the Organization of American States (OAS), three out of four women candidates for the municipal executive office in Brazilian capitals suffered some form of political violence and about 97% reported having suffered psychological violence<sup>6</sup>. Likewise, according to the Seventh Report on Political Violence in Mexico 2021 conducted by the consultancy Etellekt, 36% of the victims of political violence in that year's elections were women<sup>7</sup>. In this sense, the interview with Flavia Freidenberg invites readers to reflect on the directions of female participation and representation in politics and on their role in strengthening democracy.

We hope that our effort in organizing this special issue will inspire more researchers to embark on the exciting pathways of subnational politics. Happy reading to everyone!

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<sup>6</sup>Preliminary Report of the Electoral Observation Mission of the Organization of American States (OAS). See the full report at: <https://www.oas.org/documents/eng/press/Informe-Preliminar-MOE-Brasil-2020-ENG.pdf>.

<sup>7</sup>Seventh Report on Political Violence in Mexico 2021, Etellekt Consultores. See the full report at: <https://www.etelekt.com/informe-de-violencia-politica-en-mexico-2021-j21-etelekt.html>.

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