Bringing the Party Home:

The Progressive Insurgency in the House of Representatives and its

Impact on the Democratic Party

By

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Abstract

Bernie Sanders lost the Democratic presidential nomination—twice. And yet, since his first loss in 2016, the Democratic Party has moved toward his policy stances on a range of issues. Ideas that pundits derided as politically impossible when he first ran are now at the center of the policy debate within the party. Sanders lost his insurgent bids, but the "political revolution" he sought to ignite continues through a movement of progressive insurgents in the House of Representatives like Alexandria Ocasio-Cortez and Nina Turner. Like Sanders, most of these insurgents lose. Despite this, they are a serious force pushing Democrats left. This is puzzling: how do insurgents change political parties and national politics so rapidly when nearly all fail to win election outright? Drawing on original interviews with over 40 insurgent candidates and raw data on campaigns and congressional legislation, this thesis develops a theory of insurgency and insurgent-driven party change, provides a portrait of the Progressive Insurgency, determines what factors predict its candidates' electoral success, and examines its impact on Democratic Party policy. It finds that the Progressive Insurgency is a semi-coordinated movement that aims to capture the Democratic Party to reorient its policy priorities and through that, turn the United States into a multiracial social democracy. The predictors of insurgents' vote share vary by type of district—based on the Democratic Party's institutional and electoral strength—that they run in, but largely concern the quality of the insurgent, like their electoral experience, endorsements, and fundraising. The insurgency has had a substantial influence on Democrats' policy conversation and proposed policy but only a limited impact in its passed policy. This thesis argues that the efficacy of insurgency comes from its simultaneous institutional and ideological challenge to its host party and that, measured by its rate of electoral victory and policy impact on the Democratic Party, the Progressive Insurgency has been moderately successful. It makes empirical contributions to the study of the Progressive Insurgency, which has yet to receive deep scholarly attention, and theoretical contributions to the study of insurgency and insurgent-driven party change, which remain under-theorized relative to their frequency in American politics.

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My time at Mount Holyoke has been full of intellectual and political awakening. I did not truly understand what it meant to "think critically" before: it is because of this place, my professors, and my peers that I now do. I owe many thank-yous to those who made this college experience and this thesis possible.

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I dedicate this thesis to my witty, lefty, favorite grandparent,

Dadoo, or Henry Baker,

who was born in Detroit in 1929, whose first job was on a General Motors assembly line, who went to university through the GI Bill, who bought a house with an FHA mortgage, and who, enabled by these and other government policies and a whole lot of hard work, lived the midcentury working-class dream. Dadoo serves as a constant reminder to me of the possible flourishing that comes with mobility and stability when government serves its less fortunate people. Dadoo, thank you for perseverance, your appreciation of education and music, your humor, your recollections of 20th century politics, everything. I love you and I am proud to be your granddaughter.

"People try to accuse us of going too far left. We're not pushing the party left. We are bringing the party home."

– Representative Alexandria Ocasio-Cortez on the Progressive Insurgency, stumping for Senator Bernie Sanders's 2020 presidential campaign.[1]

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[1] Alexandria Ocasio-Cortez [@AOC], "I Want to Be the Party of the New Deal Again," Tweet, *Twitter*, November 17, 2019, https://twitter.com/AOC/status/1195884549064007680.

Introduction

Expediting Political Change:

The Efficacy of Insurgency in a Two-Party System

> "It matters that you're here—not someone else," Senator Elizabeth Warren to Representative Cori Bush after President Joe Biden's August 2021 extension of the eviction moratorium.[2]
>
> "In any other country, Joe Biden and I would not be in the same party," Representative Alexandria Ocasio-Cortez on the 2020 Democratic presidential primaries.[3]
>
> "We're almost running an alternative party. But we don't have alternative party infrastructure," Shahid Buttar, 2018 and 2020 insurgent in CA-12, on the Progressive Insurgency.[4]

Introducing the Progressive Insurgency

On August 3, 2021, Nina Turner lost a special primary election in Ohio's 11th congressional district by six percentage points. This election, in which progressive insurgent Turner faced moderate Shontel Brown to fill a recently-vacated seat, was the most high-profile in the Democratic Party in the election off-year. It attracted national attention, drawing in millions in spending, hundreds of out-of-district volunteers, and endorsements from advocacy groups and elites aligned with different factions of the Democratic Party. In response to Turner's early lead in polls, which delighted the party's left wing, moderates in the party coordinated behind Brown. Many understood the race as another in a long line of electoral battles between the Democratic Party's

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[2] Nicholas Fandos, "With Capitol Sit-In, Cori Bush Galvanized a Progressive Revolt Over Evictions," *The New York Times*, August 4, 2021, https://www.nytimes.com/2021/08/04/us/politics/cori-bush-eviction-moratorium.html.

[3] Quint Forgey, "AOC: 'In Any Other Country, Joe Biden and I Would Not Be in the Same Party,'" *Politico*, January 6, 2020, https://www.politico.com/news/2020/01/06/alexandria-ocasio-cortez-joe-biden-not-same-party-094642.

[4] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.

left and the moderate blocs over power within the party—dynamics that have been particularly pronounced since the party's 2016 presidential primaries between democratic socialist Senator Bernie Sanders and moderate former Secretary of State Hillary Clinton. And they were not wrong. Indicative of these dynamics, both Sanders and Clinton weighed in to the special election, respectively supporting Turner and Brown. Clinton's endorsement of Brown precipitated Turner's best fundraising day.[5]

Turner's platform consisted of name brand policies like Medicare for All and the Green New Deal that have become rallying cries on the left. It also included policies without the same name recognition, such as canceling student debt, making public college tuition free, and strengthening unions, among others that similarly would redistribute both resources and power downward.[6] Previously a state senator in the Ohio legislature, Turner gained national renown among progressives as a preeminent proponent of Sanders's 2016 presidential insurgency in the Democratic Party. Following the conclusion of the 2016 Democratic primaries, she became president of the Sanders's campaign's successor organization dedicated to promoting his policy vision, Our Revolution.[7] Five years later, she ran for Congress as an insurgent candidate, supported not only by Our Revolution but also by the most influential post-Sanders groups dedicated to electing progressive insurgents, like Justice Democrats, Brand New Congress, Sunrise, the Democratic Socialists of America, and the Working Families Party as well as a plethora of local advocacy organizations and unions.[8]

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[5] Mike Brest, "Nina Turner Has Best Fundraising Day of Campaign after Hillary Clinton Endorses Opponent," *Yahoo News*, June 17, 2021, https://www.yahoo.com/now/nina-turner-best-fundraising-day-154800131.html; Natalie Shure, "Nina Turner's Loss Holds Lessons for Future Left Candidates," *In These Times*, August 6, 2021, https://inthesetimes.com/article/nina-turner-ohio-11-shontel-brown-loss-bernie-sanders-joe-biden-democrats.

[6] "Issues," *Nina Turner for Congress,* https://ninaturner.com/issues.

[7] Micah Uetricht, "The World Turned Upside Down," *New Labor Forum* 26, no. 2 (2017): 20–27.

[8] "Endorsements," *Nina Turner for Congress,* https://ninaturner.com/endorsements. Unlike the other organizations, the Democratic Socialists of America and the Working Families Party have existed for decades but have grown and gained prominence since 2016.

Just as Turner stumped for Sanders in his first and second insurgent presidential bids, he did the same for her congressional campaign. In the weeks preceding the August 3 election, Sanders, the grandfather of the Progressive Insurgency, and Representatives Alexandria Ocasio-Cortez and Cori Bush—insurgents elected in 2018 and 2020—joined Turner in Cleveland to mobilize OH-11 and get out the vote. They were joined by failed progressive insurgents who ran on similar platforms to Turner's in 2018 and 2020 and came from as far away as Illinois, Texas, Florida, and Washington. Progressive insurgents running in upcoming elections also came, including Sheila Cherfilus-McCormick, who, unlike Turner, would go on to win her 2021 special primary election in Florida's 20th congressional district.[9]

This candidate solidarity is testimony to the growth of the United States' left electoral movement over the last half decade. In the two national elections since Sanders's 2016 presidential run, a new movement of progressive insurgents aiming to, in the words of one, "infiltrate" and remake the Democratic Party from within has emerged, targeting local, state, and national offices, especially the House of Representatives.[10] Most—in fact, almost all—of these progressive challengers lose their elections. But, while few in number, those that have won, such as Ocasio-Cortez and Bush, have quickly exerted disproportionate influence on national political conversations and Democratic policy.

On the same night as Nina Turner's loss, due in large part to Representative Cori Bush's organizing and advocacy, President Joe Biden issued a nationwide extension of the pandemic eviction moratorium.[11] The moratorium was set to expire the following day, but Democrats in Congress had failed to extend it prior to Congress's recess, putting millions of Americans at risk

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[9] Progressive insurgent interviews.
[10] Anthony Clark, interviewed by Amelia Malpas, September 22, 2021.
[11] Fandos, "With Capitol Sit-In, Cori Bush Galvanized a Progressive Revolt Over Evictions."

of eviction and homelessness. While most of the Democratic delegation left Washington, Bush protested to preserve the moratorium. Bush, who had been evicted and homeless before becoming a member of Congress, slept on the steps of the Capitol for nearly a week. In the day, progressive organizers, members of the public, Sanders and other elected insurgents like Representatives Ocasio-Cortez and Ayanna Pressley, and even non-insurgent Democrats like Senator Elizabeth Warren, Senate Majority Leader Chuck Schumer, and Representatives Jimmy Gomez and Joyce Beatty joined her. Some of these incumbents are likely worried about a future progressive insurgent primary challenge and hoped that their proximity to Bush would help forestall such a threat.[12] Speaker of the House Nancy Pelosi was also involved in negotiations with the White House, but it was Bush who would not drop the issue until Biden issued his directive.[13] Bush's success came from her organizer tactics of using the power of the public in concert with her power as a congresswoman, and the immense news coverage she garnered in the process, to pressure to the moderate president to act.

Bush's eviction victory is not the only time that the progressive insurgents have extracted concessions from or influenced the dynamics of disagreement within different factions of the Democratic Party. Due in large part to the election of progressive insurgents—few as they still number in Congress—the House Progressive Caucus became notably more assertive and organized in the first year of the 117th Congress (2021-2022) where Democrats have extremely narrow trifecta control of national government. In the months-long Democratic negotiations over the contents of Biden's signature physical Bipartisan Infrastructure and social infrastructure Build Back Better bills, the empowered Progressive Caucus acted as a key bargaining player and

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[12] While Beatty faced a serious primary challenge from an insurgent in 2020, Bush specifically invited her to the protest; Gomez faced a serious Green Party challenge in 2018 and was points away from losing his seat to a progressive insurgent in 2020.

[13] Fandos, "With Capitol Sit-In, Cori Bush Galvanized a Progressive Revolt Over Evictions."

maintained its demands to have the two pieces of legislation advance together for a substantial part of the first year of Biden's term.[14] The caucus had enough votes to sink the plan if its demands were not met, and its members appeared ready to exercise their new found leverage.

This legislative battle also exposed new fault-lines in the Democratic Party, indicative of its recent leftward momentum. While Biden is and always has been a "moderate" Democrat, he and his faction and the progressive faction—together roughly 95% of the congressional party—were largely in agreement about the scope of the legislation, which incorporated significant portions of some of the social policies championed by the progressive insurgents. Their primary obstacle was a handful of conservative Democrats in the House and Senate.[15] The intraparty fight over Democrats' most ambitious social policy legislation since Reagan's election and the end of the Democratic-dominated New Deal order was between Biden and conservative Democratic Senator Joe Manchin, not Sanders and Manchin. Something is happening in the Democratic Party and progressive insurgents have a lot to do with it.

Research Questions

Bernie Sanders lost the Democratic presidential nomination—twice. And yet, since his first loss

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[14] Emily Cochrane, "House Progressives Won't Vote for the Infrastructure Bill Unless the Senate Approves $3.5 Trillion in Other Spending.," *The New York Times*, August 10, 2021, sec. U.S., https://www.nytimes.com/2021/08/10/us/politics/progressives-democrats-budget.html; Daniel Marans, "How Rep. Pramila Jayapal Turned The Progressive Caucus Into A Powerful Force," *HuffPost*, October 8, 2021, sec. Politics, https://www.huffpost.com/entry/pramila-jayapal-progressive-caucus-powerful-force_n_615f6ef1e4b0fc312c95118b.

[15] Tony Romm, "Senate Democrats Adopt Sweeping $3.5 Trillion Budget That Opens the Door to Health, Education and Tax Reforms," *Washington Post*, August 11, 2021, https://www.washingtonpost.com/us-policy/2021/08/11/senate-democrats-budget-reconciliation/; Jonathan Weisman, "Deeply Divided, House Democrats Battle Over Priorities and Politics," *The New York Times*, August 22, 2021, sec. U.S., https://www.nytimes.com/2021/08/22/us/politics/democrats-divisions-infrastructure.html; Arthur Delaney, "'New Democrats' Break With Their Anti-Welfare Past And Back Biden's Agenda," *HuffPost*, October 23, 2021, sec. Politics, https://www.huffpost.com/entry/new-democrat-coalition-suzan-delbene_n_617300d6e4b010d93310da8f; Kara Voght, "The Moderates Are Blocking Biden's Ambition. Why Is He Letting Them Get Away with It?," *Mother Jones*, August 11, 2021, sec. Politics, https://www.motherjones.com/politics/2021/08/moderates-blocking-joe-biden-infrastructure-squad/.

in 2016, the national Democratic Party has moved toward his policy stances on a range of issues. Ideas that pundits derided as politically impossible when Sanders first ran are now at the center of the policy debate within the party. Sanders lost his insurgent bids. But the "political revolution" he sought to ignite appears to be underway, the momentum of which is accelerated by the Progressive Insurgency catalyzed by his first run. Progressive insurgents running for the House of Representatives have had the biggest impact on the national Democratic Party, hence the focus of this thesis on this arm of the insurgency. Like Sanders, most of these insurgents lose. Despite this, they are a serious force pushing Democrats left. This is puzzling: how do insurgents change political parties and politics so rapidly when nearly all fail to win election outright?

To address this theoretical question, I investigate three broad empirical questions: What are the Progressive Insurgency's internal dynamics? What predicts progressive insurgents' electoral performance? And what is the Progressive Insurgency's policy impact on the Democratic Party? Each forms the basis of a chapter.

To answer these empirical questions, I employ mixed methods of research and analysis. My findings are based on primary data from interviews with and surveys of over 40 progressive insurgents; raw data on elections, insurgents, congressional incumbents, and congressional districts from sources such as the Federal Election Commission, Census.gov, and Ballotpedia; and congressional legislation and members' press releases and Twitter communications. I supplement qualitative or quantitative analysis of these primary data with the odd source like Bernie Sanders's memoir and news coverage.

Findings and Argument

Progressive insurgents gave a wide range of answers for their movement's name. They run from

the pessimistic—"Efforts in Futility," "The Progressive Attempt"—to the optimistic—"Just the Beginning," "Progressive Wave 2020"; from the populist—"the American Left," "People Over Profit," "Everyday People," "An Effort to Create a Populist Insurgency for Good," "Grassroots Politics," "Eating the Rich," "Movement of Base Voters," "Not Me, Us,"—to the movement—"the Next Generation of Politics," "A Progressive Movement," "The Movement to Defend the Future from the Past"; from the revolutionary—"New Wave Revolutionary Progressive," "The Revolution"—to the mundane—"Brand New Congress," "Re-envisioning the Democratic Party," and "Un-fuck America."[16] Ultimately, none of these were pithy enough (while also being academically appropriate) for me to adopt as the political movement's name. I therefore refer to it as the "Progressive Insurgency" throughout this thesis.

Empirically, I find that the Progressive Insurgency emerged in response to Bernie Sanders's 2016 presidential insurgency and similarly aims to move the Democratic Party toward embracing universal, egalitarian social policy and through that, change the broader terrain of American politics. The nearly 200 candidates who comprise the insurgency are remarkably cohesive in their policy ideas, campaign infrastructure, and electoral strategies, such as trying to strike a balance between cultivating a national base of small-dollar donors and mobilizing voters in their specific district. The degree of contention between insurgents and the Democratic Party depends on the type of district—based on the electoral and institutional strength of the Democratic Party—that they run in, as do the factors that are most impactful for their primary election performance. While these and insurgents' primary and general election victories vary by the type of district, the significant factors overwhelmingly concern the quality of the insurgent, such as their experience and endorsements, rather than the district or the incumbent. Primaried Democrats,

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[16] Survey data.

especially those after Alexandria Ocasio-Cortez's first upset win in 2018, are largely threatened by the challenge, and accordingly, greatly increase their fundraising and cosponsorship of insurgent policies and modestly increase their communications about them. The Progressive Insurgency's greatest direct impact on the Democratic Party is on its policy conversation and proposed policy; its impact on passed policy has been minimal and indirect. The rise and fall of insurgent ideas in Biden's Build Back Better, alongside the bill's prospects of passage, exemplify insurgents' varying degrees of influence at different moments of the party's policy process.

Based on these findings, I argue that the efficacy of insurgency in a two-party system comes from its simultaneous institutional and ideological challenge to its host party. These twin challenges pose a high degree of threat to the party, allowing insurgents to have an outsized influence on its policy even though nearly all fail to win election. Overall, the Progressive Insurgency in the House of Representatives has been moderately successful measured by its rate of electoral victory and the extent of its policy impact on the Democratic Party. The insurgency has changed electoral and policy dynamics within the party in its favor even as its candidates have defeated only 7.5% of the incumbents they primaried and, as a whole, only 8% of its total candidates have won election to the House over the course of its first two electoral cycles. The Progressive Insurgency has not been so successful as to remake the Democratic Party in its own image, but it has pushed the party's policy agenda left more rapidly than any other force in the party's recent history.

Incomplete Accounts of American Political Change: Reviewing the Literature

In the content behind these claims, this thesis addresses two major gaps in the literature: one empirical regarding the Progressive Insurgency and one theoretical on insurgency and insurgent-

driven party change in American politics.[17]

Empirically, the Progressive Insurgency has yet to inspire serious scholarly study, unlike the other major post-2016 political movement involved with the Democratic Party. Following earlier work on the intensity of the conservative reaction to Barack Obama's election in the Tea Party,[18] renowned scholar Theda Skocpol along with Leah Gose produced a comprehensive profile of the liberal "Resistance" to Donald Trump's election.[19] In "Resist, Persist, and Transform: The Emergence and Impact of Grassroots Resistance Groups Opposing the Trump Presidency," Gose and Skocpol compare the Resistance to the Tea Party. They find that like the Tea Party, the Resistance mobilized into political action by a sense of loss for the country they thought they knew. But unlike the Tea Party, the Resistance was made up of citizens from a wide ideological spectrum and prioritized the *partisan* election of Democrats over *ideological* victory within that party.[20] In short, the Tea Party was an electoral insurgency. The Resistance was not. But, ignited by different moments of political loss in 2016 and motivated by different objectives, the Resistance and the Progressive Insurgency are separate. Despite emerging from the same electoral cycle as the Resistance, the Progressive Insurgency has not received scholarly attention prior to this thesis.

Theoretically, there is no comprehensive framework for insurgency and insurgent-driven party change, despite their frequency in American politics in response to the US' comparatively unusual institutions. While there is plentiful literature on specific insurgencies, for example, the

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[17] The significance of these findings extends beyond academia: several of the progressive insurgents I interviewed have explicitly stated interest in using its findings to inform the insurgency's future strategy.

[18] Theda Skocpol and Vanessa Williamson, *The Tea Party and the Remaking of Republican Conservatism* (New York: Oxford University Press, 2012).

[19] Leah E. Gose and Theda Skocpol, "Resist, Persist, and Transform: The Emergence and Impact of Grassroots Resistance Groups Opposing the Trump Presidency," *Mobilization: An International Quarterly* 24, no. 3 (2019): 293–317.

[20] Gose and Skocpol, "Resist, Persist, and Transform."

Tea Party or Barry Goldwater, it largely does not theorize insurgency beyond the case at hand.[21] The narrow part of this literature that attempts to produces important insights on insurgents' immediate strategies and the temporal context of insurgency.[22] But it is limited in its applicability by proffering only partial accounts of the phenomenon and definitions that conflate the characteristics of the particular insurgency under study—especially those advancing reactionary right politics—with the phenomenon as a whole.

The most thorough studies of insurgency in majoritarian electoral systems are James Muldoon and Danny Rye's "Conceptualising Party-Driven Movements," on Bernie Sanders's and Jeremy Corbyn's insurgencies within their respective parties, and Rachel Blum's *How the Tea Party Captured the GOP: Insurgent Factions in American Politics.*[23] Both pieces compellingly illustrate insurgents' electoral appeal, combative electoral strategies, and the contentious relationship between "outsider" insurgents and "insider" members of the party establishment as the former try to colonize the party. Useful for its contributions on Sanders's insurgency and the phenomenon more broadly, Muldoon and Rye's focus on a single insurgent leader in their definition of insurgency is a serious oversight since American insurgency also occurs below the presidential level, usually as a sustained movement. Blum's work accounts for this, but falls short with its ascription of the characteristics of the Tea Party onto insurgency in general and an

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[21] E.g., Rachel M. Blum, *How the Tea Party Captured the GOP: Insurgent Factions in American Politics* (Chicago: University of Chicago Press, 2020); Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Bryan T Gervais and Irwin L Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory* (New York: Oxford University Press, 2018); Jeffrey K. Tulis and Nicole Mellow, *Legacies of Losing in American Politics* (Chicago: University of Chicago Press, 2018).

[22] Blum, *How the Tea Party Captured the GOP*; James Muldoon and Danny Rye, "Conceptualising Party-Driven Movements," *British Journal of Politics & International Relations* 22, no. 3 (2020): 485–504; Adam Hilton, "The Politics Insurgents Make: Reconstructive Reformers in U.S. and U.K. Postwar Party Development," *Polity* 51, no. 3 (2019): 559–96; Christopher S. Parker and Matt A. Barreto, *Change They Can't Believe In: The Tea Party and Reactionary Politics in America* (Princeton: Princeton University Press, 2014); Tulis and Mellow, *Legacies of Losing in American Politics*.

[23] Blum, *How the Tea Party Captured the GOP*; Muldoon and Rye, "Conceptualising Party-Driven Movements."

assumption that insurgents change their parties only when they win their elections outright.

This is not true. Illuminating how losing insurgents can catalyze substantial party and political change, Jeffrey Tulis and Nicole Mellow in the chapter "Barry Goldwater's Politics of Integrity" in their *Legacies of Losing in American Politics* and Adam Hilton in "The Politics Insurgents Make" bring the temporal aspects, as it relates to the ideological and institutional components, of insurgency to the fore.[24] They focus on the role of insurgents in the disruption or commencement of dominant political orders. Hilton argues that insurgencies vary on whether they seek to restore or repudiate dominant political logics and whether they target a major party as their host or start their own. These decisions shape the legacies insurgents leave even—especially— when they lose. In this vein, Tulis and Mellow elucidate how the ideological and organizational mechanisms that created Barry Goldwater's 1964 landslide loss led to Ronald Reagan's insurgent revolution 16 years later. They show insurgents to change politics without winning election.

Unlike insurgency, scholarship on parties and party change is plentiful. The two preeminent scholarly schools on parties conceive of them as elite- versus group-centered organizations, respectively, and offer largely illuminating accounts of parties and how they change.[25] But, despite the prevalence of insurgency in the US, neither incorporates insurgents as agents in their theories of party change.

On the one hand, scholars such as John Aldrich in *Why Parties? A Second Look* who conceive of parties as elite-centered organizations understand political parties as existing first and foremost to aid the election of the ambitious political elite (officeholders).[26] Politicians endorse

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[24] Hilton, "The Politics Insurgents Make"; Tulis and Mellow, *Legacies of Losing in American Politics*.
[25] John H. Aldrich, *Why Parties?: A Second Look* (Chicago: University of Chicago Press, 2011); Kathleen Bawn et al., "A Theory of Political Parties: Groups, Policy Demands and Nominations in American Politics," *Perspectives on Politics* 10, no. 3 (2012): 571–97; David Karol, *Party Position Change in American Politics: Coalition Management* (New York: Cambridge University Press, 2009).
[26] Aldrich, *Why Parties?*

policy to appeal to the electorate, rather than running primarily to advance a particular policy or cause. It follows from this theory that parties change when their elite believe it will be advantageous to their election to change their policy stances. There are certainly instances when these dynamics are in play, but the omission of insurgency as a catalyst for elite-driven party change by exposing or creating an electoral constituency for particular issues or broader political principles is an oversight.

On the other hand, Kathleen Bawn, Martin Cohen, David Karol, Seth Masket, Hans Noel, and John Zaller in "A Theory of Political Parties: Groups, Policy Demands and Nominations in American Politics" and David Karol in *Party Position Change in American Politics: Coalition Management* envision parties as coalitions of intense policy-demanders.[27] Parties are coalitions of interest groups, activists, and other policy-demanders "seeking to capture and use government for their particular goals," whose policies aspiring officeholders support in return for electoral resources from groups.[28] Parties prioritize policy and these relationships to organizations within their network, exploiting voters' lack of detailed attention to politics and existing partisan attachments to win election. These scholars accordingly view party change as rooted in changes in policy demands from groups in the party's coalition, either from already-institutionalized groups updating their demands or the entry of new groups into the party network. They do not account for how insurgents contribute to party change through catalyzing new balances of power among policy-demanders within the broader party due to their close relationships with and elevation of insurgent groups and active social movements with new demands.

My theory of insurgency and insurgent-driven party change aims to build off of the strengths and overcome the shortcomings of these literatures to illuminate a frequent yet

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[27] Bawn et al., "A Theory of Political Parties"; Karol, *Party Position Change in American Politics*.
[28] Bawn et al., "A Theory of Political Parties," 571.

understudied phenomenon in American politics. It serves as the basis of my quantification of these phenomena in the central chapters of this thesis and informs the outline and emphases of the project.

A Theory of Insurgency and Insurgent-Driven Party Change

My theoretical framework for insurgency and insurgent-driven party change, in turn, covers the institutional context of these phenomena, defines insurgency, details the process of insurgent-driven party change, and underscores how insurgents can effect political change even when they lose elections.

The Institutional Context of Insurgency and Insurgent-Driven Party Change

Electoral insurgents are motivated to seek formal political power by their perception of being ignored ideologically and politically by existing parties, the urgency of which is heightened by crisis or poor conditions that disaffect citizens. How insurgents seek to remedy their exclusion from substantive representation in the formal exercise of political power, however, can only be understood in the institutional context in which it occurs.[29] Insurgents' strategies are shaped by opportunities and constraints in their country's electoral system and party structures. In the United States, insurgents serious about contending for power must attempt to remake or reorient an existing party to advance their agenda, since its first-past-the-post majoritarian electoral system renders third party bids electorally unviable.[30] That is, where serious insurgents might start a new

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[29] Muldoon and Rye, "Conceptualising Party-Driven Movements"; Blum, *How the Tea Party Captured the GOP*; Hanspeter Kriesi, "Party Systems, Electoral Systems, and Social Movements," in *The Oxford Handbook of Social Movements*, ed. Donatella Della Porta and Mario Diani (New York: Oxford University Press, 2015), 667–80.

[30] Douglas J. Amy, *Real Choices/New Voices: How Proportional Representation Elections Could Revitalize American Democracy* (New York: Columbia University Press, 2002); Lee Drutman, *Breaking the Two-Party Doom Loop: The Case for Multiparty Democracy in America* (New York: Oxford University Press, 2020); Steven J. Rosenstone, Roy

political party in countries with proportional representation (for example, the relatively new far left Podemos and far right Vox in Spain), American insurgents face institutional constraints that channel them into pursuing power through the existing two major parties. While some in the US do run as third-party protest candidates, my theory focuses on insurgents that are oriented toward winning institutional power and therefore target an existing party as their host.[31]

Where insurgents face constraints from the American electoral system that incentivize remaking a party rather than starting their own, the major parties' relative decentralization and porosity, especially nomination by primary elections, afford insurgents opportunities to do so.[32] This is evident in insurgents' ability to contest "establishment" members of the party in primary elections and in the possibility of an active party minority exercising outsized influence. The *raison d'être* of insurgency is policy and ideological change. As a type of political entrepreneur, insurgents exercise agency by exploiting institutional complexity, constraints, rules, opportunities, and existing distributions of power to advance their ends.[33] The host party is simply a vehicle to power and insurgents exploit the parties' relative openness to newcomers to change its direction in their favor. Put differently, while insurgents face resistance in their institutional and ideological challenges to their host party, it is easier to change a party's policy agenda than to win election through a third party.

Further, while the US' combination of an impenetrable two-party system with permeable parties greatly shapes insurgent strategy, these institutional contours also accelerate party change

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L. Behr, and Edward Lazarus, *Third Parties in America: Citizen Response to Major Party Failure*, 2nd ed., (Princeton, N.J: Princeton University Press, 1996).

[31] Hilton, "The Politics Insurgents Make."

[32] Muldoon and Rye, "Conceptualising Party-Driven Movements"; Gary C. Jacobson and Jamie L. Carson, *The Politics of Congressional Elections* (Lanham, MD: Rowman & Littlefield, 2019); Shigeo Hirano and James M. Snyder, *Primary Elections in the United States* (New York: Cambridge University Press, 2019).

[33] Adam Sheingate, "The Terrain of the Political Entrepreneur," in *Formative Acts: American Politics in the Making*, ed. Stephen Skowronek and Matthew Glassman (Philadelphia: University of Pennsylvania Press, 2008), 13–31.

if the insurgency is exceptionally successful (as seen with the Tea Party). In the face of such successful insurgent challenges, establishment politicians, like the insurgents themselves, cannot start a new viable party and are unlikely to bolt to the other major one. This process is further accelerated if the party has little tolerance for ideological diversity among its elite.[34] The US' institutional constraints and opportunities greatly impact insurgents' strategies, making the country comparatively unusual for both the centuries-long existence of the same two political parties and the relative frequency of insurgency.

Insurgency

Electoral insurgency exists in relation to one of the major parties. Insurgency is a simultaneous institutional and ideological challenge to a host party from within it, as illustrated in Figure 1. Candidates who only challenge the party institutionally are likely pursuing a one-off, careerist challenge or responding to a particular incumbent's failings and thus lack the ideological basis or social movement support of an insurgency. Likewise, it is not insurgency if activists only aim to change party ideology without directly contending for institutional power as a candidate, as a leader of a social movement or intellectual political entrepreneur might do.

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[34] Blum, *How the Tea Party Captured the GOP*.
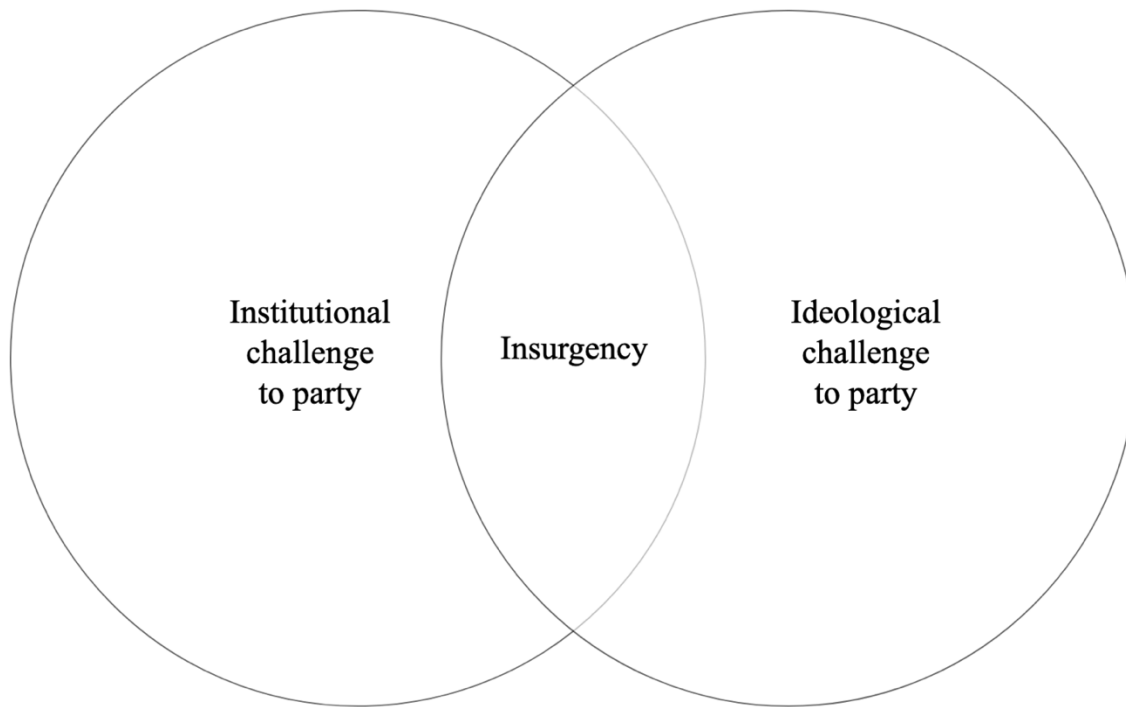
Figure 1: Defining qualities of insurgency.

Primary elections are the key mechanism through which insurgents exert their institutional challenge to the party.[35] Insurgents' use of primary elections to win power in their host party looks different, and has distinct strategic implications for party change, depending on where they run relative to their party's electoral fortunes and institutional strength. That is, insurgents can challenge the party at its strongest by primarying a sitting incumbent, at its weakest in areas where the party usually loses due to the partisan makeup of the constituency, or somewhere in between. Within this, not all incumbents are the same: insurgents can primary incumbents in the wing of the party closest to their movement, such as progressive insurgents primarying liberal members of the Democratic Party, or those who are on the opposite wing, such as progressive insurgents primarying conservative Blue Dog Democrats. Insurgents challenging incumbents furthest away

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[35] Jacobson and Carson, *The Politics of Congressional Elections*; Hirano and Snyder, *Primary Elections in the United States*; Robert G. Boatright, *Getting Primaried: The Changing Politics of Congressional Primary Challenges* (Ann Arbor: University of Michigan Press, 2013).

from their politics who may be strongly opposed to their agenda is logical from a practical standpoint. That is, if successful, they would replace members of the party who would largely not vote for their policies. In contrast, their challenges to incumbents politically closer to them may replace members who would have provided votes for insurgent policy. These latter challenges, then, provide insurgents with an opportunity to redefine what it means to be "progressive" or "conservative" in their parties based on their ideological orientation rather than what they see as a compromised, impure earlier definition.[36] These latter incumbents must adopt insurgent policies to maintain their relative ideological position within the party.

Insurgents' electoral contestation of incumbents is the most direct, confrontational kind of institutional challenge.[37] It is a direct, high-stakes challenge for the institutional power that the incumbent holds. Insurgents gain influence in their parties via rare direct primary election victories and, more commonly and indirectly, exerting electoral pressure on incumbents who to attempt to preempt their challenge by accommodating their policy demands. These dynamics can allow insurgents to exercise outsized power within their host party. As elaborated later, the direct impact of their combative electoral strategy varies based on whether the insurgency is a one-off presidential bid or a sustained, semi-coordinated, and somewhat successful movement for lower offices like Congress.

Insurgents are distinguished by their demands for ideological change and their aim to change distributions of power and dominant policy ideas within the party.[38] Crucially, ideological insurgents tend to elevate political ideas and principles—for example, not accepting political

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[36] Blum, *How the Tea Party Captured the GOP*.
[37] Ibid.
[38] Ibid; Muldoon and Rye, "Conceptualising Party-Driven Movements"; Hilton, "The Politics Insurgents Make."

action committee (PAC) campaign contributions—over personal or partisan victory.[39] Barry Goldwater was a famously reluctant candidate while Bernie Sanders's slogan was "not me, us": they ran because of their ideological conviction. Expecting to lose because their platforms are so far from the logics of the dominant political order but advancing them for the sake of integrity, these insurgents are the opposite of politicians like Eisenhower, Nixon, and Clinton, who won election by acquiescing to the popularity of the existing political order. Instead of consolidating the dominant political order, they aim to disrupt it.[40] They provide a genuine alternative public philosophy, political principles, and policy ideas—aiming to either restore the regime to its founding or repudiate it entirely.[41] That is, they aim to change the terrain of political discourse and the public's imagination of what is politically possible through their policy and ideological innovation and the institutional transformation of their host party.

When insurgents aim to return to the founding principles of the existing order, they target the political party that inaugurated it (for example, the Tea Party with the Republicans and the neoliberal order). When they offer a new public philosophy without apology or overture to dominant ideas, they target the political party that acquiesced to the existing regime but did not start it (Goldwater with the Republicans and the New Deal order; Sanders and the Progressive Insurgency with the Democrats and the neoliberal order). These insurgents also articulate and attempt to assemble a new electoral coalition with the potential to root their new political vision, prioritizing them in their proposed policy. For example, progressive insurgents with student debt cancelation and securing the votes of young people and the broadly-conceived multiracial working

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[39] Tulis and Mellow, *Legacies of Losing in American Politics*; Blum, *How the Tea Party Captured the GOP*; Boatright, *Getting Primaried* discusses of "policy amateur" candidates who run to change the salience of an issue or a party's position on it. Not a focus of this theory, I contrast ideological insurgents to "demagogic insurgents," like Donald Trump, whose primary objective is personal power and advance ideological challenges, if at all, only advantageously.
[40] Tulis and Mellow, *Legacies of Losing in American Politics*.
[41] Ibid; Hilton, "The Politics Insurgents Make."

class.

The political timing of insurgents' challenges is rarely random: they often exploit an upset electoral loss, a series of losses, or policy failure of their host party to try to push it in a new ideological direction.[42] Sometimes insurgents run when their host party is weak and its elites disagree about how to correct course and the dominant order is fragile, such as the Tea Party, which may be most conducive to their outright success. Other times they run when the order is strong, such as Barry Goldwater, which may prove less conducive to their immediate success.[43] In either case, insurgents take advantage of and activate voters' disaffection with American politics in general and their host party in particular.[44] As such, insurgents draw particularly strong support from voters for their host party that were deeply dissatisfied with the party's last president and his policy.[45]

Insurgents are also closely connected to organized activist groups and active social movements outside of their host party. These groups' resources and organized activist base bolster insurgents' sustained and credible threat to incumbents. Development of this essential extra-party infrastructure can either precede the insurgency, as with Goldwater whom organized activist groups drafted to run and played a large role in his securing the presidential nomination, or emerge in response to an insurgency, as with those that followed Sanders's first presidential run.[46] Additionally, existing groups can be repurposed to fill this role, as with the Tea Party, or can grow dramatically, as with the Democratic Socialists of America after Sanders's run.[47] These extra-party

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[42] Boatright, *Getting Primaried*; Sheingate, "The Terrain of the Political Entrepreneur."
[43] Tulis and Mellow, *Legacies of Losing in American Politics*.
[44] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.
[45] Nella Van Dyke and David S. Meyer, "Introduction," in *Understanding the Tea Party Movement*, ed. Nella Van Dyke and David S. Meyer (Milton Park, UK: Routledge, 2014), 1–14; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.
[46] Tulis and Mellow, *Legacies of Losing in American Politics*.
[47] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.

groups can either be mass organizations, elite-driven professional advocacy groups, a combination of both, and in some cases, media organizations providing a sympathetic bullhorn to the insurgency. While these groups can blur distinctions between electoral and social movement activism, insurgents also have close relationships to activists on the social movement front.[48] At the most extreme, distinctions between social movements and insurgents collapse altogether: Donald Trump is both a leader of the MAGA movement as well as a formerly-elected insurgent head of a major party. But even when insurgents and movements are clearly separate, insurgents tend to be more closely linked to movements than their establishment counterparts. Extra-party groups and movements provide crucial resources to insurgents and raise costs for the establishment, abetting insurgents' challenge and change from within a party.

Insurgent-Driven Party Change

Party change can show up in any part of a party.[49] Because this theory focuses on ideological insurgency, I am most interested in change in a party's policy priorities and principles. The theory that follows focuses on *how* insurgency creates conditions in a party that lead it to change its policy positions. I distinguish between insurgent-driven policy change via "sticks" and "carrots." Insurgents' direct institutional contestation—the "stick" mechanisms—creates change through party-member turnover and pressuring incumbents to preemptively coopt policy. The "carrot" mechanisms account for softer electoral incentives for policy change in the image of insurgency from movements, groups, and potential constituencies as well as elites' understanding of the insurgency's electoral utility that accompany insurgents' institutional challenge.

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[48] Bruce Miroff, "Movement Activists and Partisan Insurgents," *Studies in American Political Development* 21, no. 1 (2007): 92–109; Parker and Barreto, *Change They Can't Believe In*.
[49] Daniel J. Galvin, "Political Parties in American Politics," in *The Oxford Handbook of Historical Institutionalism*, ed. Orfeo Fioretos, Tulia G. Falleti, and Adam Sheingate (New York: Oxford University Press, 2016), 310–24.

The key mechanisms of insurgent-driven party change parallel the essence of insurgency: insurgents use institutional means to achieve ideological ends. That is, they exploit primary elections to effect policy position change within their host party. Crucially, however, insurgents do not need to win their elections outright to influence party policy.[50] If the electorate is attracted to the insurgency's politics, this potent combination of institutional and ideological challenge from within the party can result in rapid party change. As Figure 2 shows, party change from insurgents' direct challenge from within the party comes about two main ways: *turnover* when insurgents defeat incumbents in primary elections and *cooptation* when incumbents update their policy stances to try to preempt such a challenge.[51] That the ideological balance within a party, and therefore its policy, changes when an insurgent replaces an establishment member, such as Alexandria Ocasio-Cortez's victory over incumbent Joe Crowley, is an obvious case insurgent-driven policy change. Party change via turnover, however, is rare.[52]

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[50] Tulis and Mellow, *Legacies of Losing in American Politics*; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Richard C. Barton, "How Challenges in Primaries Shift the Policy Agendas of Political Parties," *Scholars Strategy Network*, October 28, 2019, https://scholars.org/contribution/how-challenges-primaries-shift-policy-agendas-political-parties; Blum, *How the Tea Party Captured the GOP*; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.

[51] Barton, "How Challenges in Primaries Shift the Policy Agendas of Political Parties"; Kriesi, "Party Systems, Electoral Systems, and Social Movements."

[52] Karol, *Party Position Change in American Politics*.

Mechanisms of party change   Type of party change
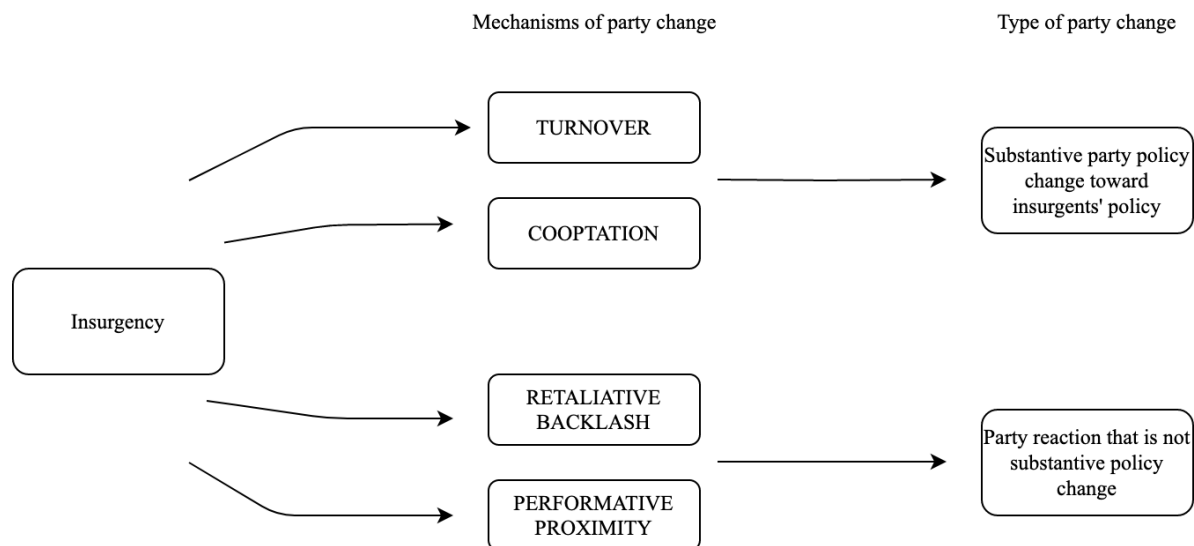
Figure 2: Mechanisms of insurgent-driven party change from insurgents' institutional "stick" pressure.

Much more common is policy change as a result of incumbents' cooptation of insurgent policy to try to preempt a serious primary challenge and a potential loss of their seat.[53] Incumbents' electoral incentives for policy cooptation stem from the success of insurgents in toppling other incumbents: party change via cooptation coexists with turnover. Incumbents aim to maintain their institutional power by preempting insurgents' institutional challenge through accommodating some of their ideological demands.[54] Critically, any incumbent who fears an insurgent challenge—not only those who actually *have* been challenged—may coopt insurgents' policy.[55] While incumbent cooptation is more incremental and less romantic than insurgent election, it is the primary form of insurgent-driven party change. Furthermore, such incumbent cooptation can even pull other incumbents unafraid of an insurgent challenge toward the insurgency's position by

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[53] Karol, *Party Position Change in American Politics*.

[54] Boatright, *Getting Primaried*; Bonnie M. Meguid, "Competition Between Unequals: The Role of Mainstream Party Strategy in Niche Party Success," *American Political Science Review* 99, no. 3 (2005): 347–59; Rosenstone, Behr, and Lazarus, *Third Parties in America*.

[55] Richard Barton, "The Primary Threat: How the Surge of Ideological Challengers Is Exacerbating Partisan Polarization,'" *Party Politics*, (2022); Elaine C Kamarck and James Wallner, "Anticipating Trouble: Congressional Primaries and Incumbent Behavior," *Brookings Institution*, October 2018, https://www.brookings.edu/wp-content/uploads/2018/10/GS_10292018_Primaries-and-Incumbent-Behavior.pdf.

changing the policy commitments necessary to maintain their relative position in the party's center, left wing, or right wing.[56] For example, the rise of the Tea Party within the Republican Party moved what it meant to be a conservative and moderate Republican to the right. Politicians' relative ideological position within their party is more constant over the course of their careers than their particular policy preferences.[57]

Additionally, the office that the insurgency targets impacts the establishment's response. A losing presidential insurgency likely results in some concessions from the party-favorite candidate, but since these insurgents usually strike when their host party does not have an incumbent president, their immediate impact is blunted (see later section for their legacy). This contrasts to an insurgency waged in a semi-coordinated, simultaneous, and sustained manner for lower offices like the House across multiple electoral cycles. If these incumbents win their races but fear future insurgent challenges, they can use their institutional power to advance legislation they hope will preempt a challenger—a process faster than party change via turnover.[58] Senate Majority Leader Chuck Schumer's evolving politics is an example of both dynamics of an incumbent's preemptive policy cooptation and maintenance of the same relative position with the Democratic Party via adoption of new policies. Given the number of progressive insurgents in New York state, Schumer is likely quite weary of a challenge. Political journalists have reported that job applicants in the senator's office must rank Schumer on an ideological scale of 0-100; the correct answer is always "75" or perfectly in the middle of the Democratic Party.[59] The 75 is static

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[56] See, for example, how the moderate New Democrats broke with their anti-welfare past to embrace key parts of Biden's agenda in Delaney, "'New Democrats' Break With Their Anti-Welfare Past And Back Biden's Agenda."

[57] Karol, *Party Position Change in American Politics*.

[58] Ibid.

[59] Ben Terris, "'He's Not That Kind of Fighter.' Can Play-by-the-Rules Chuck Schumer Win on Trump's Turf?," *Washington Post*, November 5, 2018, https://www.washingtonpost.com/lifestyle/style/hes-not-that-kind-of-fighter-can-play-by-the-rules-chuck-schumer-win-on-trumps-turf/2018/11/02/6a830f7a-de01-11e8-b732-3c72cbf131f2_story.html.

but what Schumer understands "75" to mean is in flux: currently, it means publicly endorsing some progressive insurgent policy, like the abolition of student debt and the creation of a Civilian Climate Corps—markedly to the left of his positions a few years ago.[60]

This theory is focused on party policy change, but it is important nevertheless to acknowledge the procedural backlash that elites can respond to insurgency with, even if they are simultaneously coopting policy. The host party can also respond to the insurgency with retaliatory procedural rules meant to impede insurgent success, such as restricting what firms and software insurgents have access to in their primary campaigns. A final incumbent response that is neither cooptation nor backlash is to perform proximity to insurgents but without coopting their policy. For example, a challenged incumbent could post on social media about their closeness with other elected insurgents to try and lessen the threat of the challenge while not supporting or coopting any of their policy. The objective of all forms of establishment response is to diminish the ability of insurgents to succeed in their institutional contestation either by retaliation or cooptation.[61] Alongside mechanisms of substantive policy change, Figure 2 above also shows these forms of party response to an insurgency.

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[60] Karol, *Party Position Change in American Politics*; Alexander Burns, "Why Chuck Schumer Is Cozying Up to the A.O.C. Wing of His Party," *The New York Times*, February 7, 2021, sec. U.S., https://www.nytimes.com/2021/02/07/us/politics/schumer-impeachment-new-york.html.
[61] These responses confirm primary elections, and the dual ideological and institutional challenge to the party that insurgents wage there, as the key site of insurgency.

Insurgents' rate of outright
success & tactics

Insurgent-activated incentives
for policy change

| Elite see insurgency as electorally beneficial |

| Rate of insurgent turnover |

| Party tries to absorb new constituency that the insurgency created/exposed |

+

| Extent of elected insurgent combativeness with party |

| Insurgents win seats where party usually loses |

=

| Speed of party cooptation |

| Newly-elevated groups offer resources to elites who embrace their demands |

Figure 3: The rate of party cooptation of insurgent policy.

In addition to the "stick", insurgents also drive party change through the "carrot" of resource incentives, portrayed in Figure 3. Incumbents seem to perceive insurgency to pose a distinct risk that is transposable across races in a way that non-insurgent challenges are not. The speed and extent of party cooptation is the result of the outright electoral success of the insurgency (turnover) and how combative elected insurgents are toward other members and the leadership of their host party. Insurgents' combativeness depends on the number of elected insurgents and how their ideological orientation constrains or encourages scorched earth strategies. For instance, the Tea Party's obstructionist tactics were informed by its reactionary politics while the Progressive Insurgency's social democratic objectives necessitate more cooperative strategies.[62]

Host party weakness and internal elite disagreement about the correct remedy is

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[62] Blum, *How the Tea Party Captured the GOP*; Ruth Bloch Rubin on Justice Democrats, "Bloc Party 201: Advanced Tactics," *Justice Democrats Bloc Party Podcast*, August 18, 2021.

particularly fertile ground for insurgent-driven party change: incumbents coopt insurgent policy with special vigor when their party elite view the insurgency as electorally useful for the party and develop a narrative of its contribution to their success.[63] First, insurgents exploit a party's internal disarray and electoral humiliation to advance within the party and, second, insurgents performing well in general elections under these conditions adds additional pressure to members of the establishment to increase their electoral appeal by adopting insurgent ideas. Insurgents are also empowered relative to the establishment by the diminished credibility of the latter in defense of the status quo and the electorate's desire for something new. The Tea Party, for example, exploited internal Republican Party disarray at the end of Bush II's unpopular presidency and voter appetite for change whetted by the Great Recession and large Democratic victories, including of the US' first Black president. Republican incumbents' view of insurgency's ideas as a prime way to reinvigorate the party abetted their influence.[64]

Insurgents can also drive policy change in their host party via electoral coalition expansion and winning seats where their host party is typically disadvantaged. They usually also attempt to fashion—or demonstrate the existence of—a new electoral coalition or issue constituency, advocating and, if elected, implementing policies that would materially benefit the voters required to anchor their reoriented party.[65] The host party can then try to woo or absorb these voters, changing the makeup and policy demands of its base. Supporters of the insurgency, further, can evaluate future politics and policy via their ideological lens, making their votes for a major party

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[63] This is an inverse of party narratives about their loss, e.g., Seth Masket, *Learning from Loss: The Democrats, 2016–2020* (New York: Cambridge University Press, 2020), but with a similar effect of pushing the party in a particular direction depending on its elites' story of their electoral success.

[64] Blum, *How the Tea Party Captured the GOP*.

[65] Tulis and Mellow, *Legacies of Losing in American Politics*; Andrew Marantz, "Are We Entering a New Political Era?," *The New Yorker*, May 31, 2021, https://www.newyorker.com/magazine/2021/05/31/are-we-entering-a-new-political-era; Ronald B. Rapoport and Walter J. Stone, *Three's a Crowd: The Dynamic of Third Parties, Ross Perot, and Republican Resurgence* (Ann Arbor: University of Michigan Press, 2007).

contingent on satisfying insurgents' principles.[66] Finally, if insurgents run and win in districts where the host party does not perform well in, members of the establishment may be inspired to adopt their policy to make party candidates viable in previously discounted districts. These incentives for party change in the image of insurgency bring new voters into the host party electoral base, with the long-term potential for electoral realignment.

The insurgents' electoral success is bolstered by their strong relationships to social movements and extra-party groups. But their influence does not stop there. Insurgents' connections to active movements with overlapping ideological objectives contributes to party change by reordering movements' and groups' proximity to power within the party. These insurgency-aligned groups make new demands and offer new resources to sympathetic politicians, which alters the party's agenda, for example, the post Sanders elevation of Sunrise and the climate justice movement in the Democratic Party relative to mainstream, incrementalistic environmental groups.[67] Extra-party activist groups wholly committed to an insurgency provide vital financial and activist energetic resources to advance insurgents' ideas after an election.[68] These groups' ability to mobilize and channel resources of all types toward insurgents and establishment members sympathetic to their policy demands and sustain activist and supporter energy across electoral cycles are key in insurgent-driven party change.[69] This conforms with scholars' group-centered conceptions of parties and change, but with a critical revision of insurgents as catalysts of new balances of power, and therefore policy demands, within the party.

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[66] Tulis and Mellow, *Legacies of Losing in American Politics*.
[67] Bawn et al., "A Theory of Political Parties"; Karol, *Party Position Change in American Politics*; Galvin, "Political Parties in American Politics."
[68] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.
[69] Tulis and Mellow, *Legacies of Losing in American Politics*; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.

A Final Note on Loss and Insurgent Influence

Most insurgents lose. But, due to the power of their simultaneous institutional and ideological challenge, insurgents do not need to win to leave influential legacies of party and broader political change.[70] An electoral loss for an insurgency, especially a presidential one, is not the death knell for their political movement or their ideas.[71] Their losses can galvanize their political movement, as with Sanders's 2016 presidential run and progressive insurgents' subsequent congressional bids. Ideological insurgents are a catalyzing force of political change in the US. Their elevation of policy ideas and political principles over their personal victories and exploitation of party weakness, in concert with their combative institutional contention for power and alliance with active social movements and extra-party groups, can lead to substantial party and political change, even if it takes numerous electoral cycles for insurgents' legacies to materialize as such.

Overview of Thesis

Having introduced the Progressive Insurgency and presented my theory of insurgency and insurgent-driven party change in this Introduction, this thesis proceeds as follows. Chapter 2 provides an in-depth portrait of the Progressive Insurgency, with special attention to its origins and internal dynamics, policy, relationship to the Democratic Party, and electoral strategy. It finds that progressive insurgents largely ran because of Sanders, from whom they took policy inspiration, and that the nature of their relationship to the Democratic Party depends on how strong the party is in the district where they run their overwhelmingly cash-strapped campaigns. Chapter 3 looks at the electoral performance of insurgents, focusing on what factors have the greatest impact on and how threatened incumbent Democrats are by their primary challenges. It finds that the

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[70] Barton, "How Challenges in Primaries Shift the Policy Agendas of Political Parties."
[71] Tulis and Mellow, *Legacies of Losing in American Politics*.

predictors of insurgent success vary by the partisan makeup and incumbency status of the district and that a plurality of primaried Democratic incumbents take the threat of the challenge seriously. Chapter 4 examines the insurgents' impact on the Democratic Party, as seen in the party's policy conversation, proposed policy, and passed policy. It finds that the insurgents have directly influenced Democrats' rhetoric and proposed policy most while their impact on passed policy is lesser and more indirect. The Conclusion tests the theoretical framework introduced here through a comparison of the success of the Progressive Insurgency with a recent rightwing insurgency, the Tea Party, and a left movement that did not choose the institutional path of insurgency, the Green Party. It finds that the while there are similarities between the two insurgencies, the Tea Party had a much greater rate of turnover and successful activation of incentives for cooptation than did the Progressive Insurgency, and that the Green Party's influence has been much more blunted than the Progressive Insurgency's. Together, these chapters illuminate an electoral insurgency and its political influence in its earliest years.

Chapter 2

The New Progressives:

A Portrait of the Insurgency

Introduction

In June 2019, Jamaal Bowman launched a primary challenge to Representative Eliot Engel in New York's 16th congressional district. Straddling portions of both the Bronx and Westchester County, the district is one of the most economically unequal in the United States. Representative Engel legislated more on behalf of the district's affluent constituents than its working class. He was also notably absent from his district, prompting engaged constituents to joke about mythical sightings of the congressman in NY-16. During the primary election, a reporter taped Engel on a rare visit saying that "if [he] didn't have a primary, [he] wouldn't care" about being in the district he supposedly represented in the House of Representatives.[72]

Bowman, a middle school principal prior to his entry into electoral politics, challenged Engel to provide representation to the constituents he overlooked. Adding insult to injury, and fuel to the fire of Bowman's campaign, these constituents bore the brunt of the negative public health and economic impact of the covid-19 pandemic in 2020. With strong relationships to the movements for racial and environmental justice, Bowman ran on a plethora of progressive policies from Medicare for All to the Green New Deal to reallocating funds from reactive policing to proactive measures that address the root causes of crime. Summing up his political views and

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[72] Bridget Read, "Jamaal Bowman's Campaign Is More Than Exciting," *The Cut*, June 23, 2020, https://www.thecut.com/2020/06/jamaal-bowman-eliot-engel-new-york-significant.html.

distinguishing himself from the moderate, hawkish Engel, Bowman campaigned on being "a Democrat who will fight for schools and education, not bombs and incarceration."[73] In another interview, he said that while he primarily conceived of himself as an educator and a Black man in America, "My policies align with those of a socialist … I guess that makes me a socialist."[74] Bowman was also inspired to run by the success of another Bronx insurgent, Alexandria Ocasio-Cortez, in toppling a similarly out-of-touch incumbent two years earlier, who, in turn, had run for Congress because of Bernie Sanders's 2016 presidential campaign and her experience fighting for environmental justice at Standing Rock.[75] Like Ocasio-Cortez, Bowman defeated the incumbent in the primary election and went on to become a member of Congress.

But this is just the story behind now-Representative Bowman's successful insurgent challenge; he is only one of nearly 200 candidates in the political movement. This chapter applies my theory of insurgency to the case of the Progressive Insurgency and uses exploratory research to provide a comprehensive profile of the movement. I aim to answer the following questions: What are the origins of and dynamics within the Progressive Insurgency? Who are the insurgents and why are they running? What is their policy platform and how do they understand their ideological orientation? How contentious is the insurgency's relationship to the Democratic Party? How do insurgents use social media and how do national and local media cover their campaigns? What is the insurgents' electoral strategy?

In this chapter, I argue that the Progressive Insurgency, which emerged following Bernie Sanders's 2016 presidential insurgency, aims to capture the Democratic Party—by not only

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[73] Read, "Jamaal Bowman's Campaign Is More Than Exciting."
[74] Marantz, "Are We Entering a New Political Era?"
[75] Ibid; Emily Cochrane, "Bronx Principal to Challenge Eliot Engel, Powerful House Democrat, From the Left," *The New York Times*, June 18, 2019, sec. U.S., https://www.nytimes.com/2019/06/18/us/politics/jamaal-bowman-eliot-engel.html.

replacing moderates and conservatives in the party but those who call themselves progressive—and make it a font of and fighter for social democratic policies. However, there are unresolved tensions in this movement, between the insurgency and the Democrats, their national audience but geographically-delineated voters, and insurgents' policies and practices regarding campaign labor.

Specifically, I find that the Progressive Insurgency was catalyzed by Bernie Sanders's 2016 loss, which also led to the creation of new or revitalized existing organizations as infrastructure for the insurgency. Challengers in 2020 were also inspired to run by those who ran in 2018, including the majority who lost, and, regardless of year, understand it as a movement rather than an amalgam of individual candidates. Most insurgents' platforms came from Sanders or core insurgent organizations and a considerable number are democratic socialists, although there is ideological variation within the insurgency. It was difficult for challengers to expand the public's imagination of what is politically possible away from the individualistic, market-based mainstream, especially to convince voters that the US government can in fact serve its people and can pay for whatever it wants, including popular social policy.

Progressive insurgents largely targeted Democratic incumbents who have been in Congress for at least a decade and challenged roughly the same number of liberal and moderate/conservative Democrats. How hostile the Democratic Party was to insurgents largely depends on the type of district, although the national party pushed back against the insurgency by blacklisting firms that work with them. Despite this, party operatives did not ask or pressure a majority of challengers to drop out of their races. Insurgents tried to build both a national base of donors and volunteers, fed by national media coverage and their social media, and organize a local base of voters, aided by local media coverage. However, many received more national than local media coverage, which stunted their ability to mobilize voters in their districts. Most insurgents did not raise enough

money to pay staff, which both lessened their campaign's viability and created great tension between the candidates' ostensibly pro-worker policy agenda and their exploitation of campaign labor.

This chapter proceeds as follows. First, I operationalize my theory of insurgency, provide a basic sketch of who the progressive insurgents are, and detail my methods. Next, I discuss the origins of the Progressive Insurgency, its cohesion as a movement, and its expansive policy agenda. I then examine the nature of the insurgency's relationship to the Democratic Party and the cross-pressures insurgents experienced. Finally, I discuss insurgents' campaigns and electoral strategies.

Who Are the Insurgents? Theory and Methods

This section applies my theory of insurgency to the case, provides a basic outline of who the progressive insurgents are, and discusses my methods of data collection and analysis.

Operationalizing Insurgency

My operationalization of insurgency flows from my theoretical framework in the Introduction. Each key conceptual characteristic of insurgency correlates to a quantifiable measure, which I apply to either individual challengers or the Progressive Insurgency as a whole. Once I have established that a challenger is an insurgent, I assume that the aspects of insurgency that apply to the movement as a whole, like its relationship to social movements, automatically apply to them and therefore I do not quantify them individually for each candidate. I applied my definition of insurgency to a broad list of congressional candidates that I assembled from political organizations' endorsements. I started with the core insurgent groups—Justice Democrats, Brand

New Congress, Our Revolution, Sunrise, the Democratic Socialists of America, and the Working Families Party—and moved outward to other progressive organizations whose endorsements overlapped significantly with core groups', taking that as a sign that the group was similarly ideologically oriented.[76]

To be included in this study, individual challengers must run as Democrats (rather than run as, say, Green Party or independent candidates), get on the ballot, and not withdraw before the primary election.[77] I measure candidates' institutional challenge to the Democratic Party differently depending on the partisan makeup and incumbency status of the district they run in.[78] Candidates who primary Democratic incumbents are clearly institutionally challenging the party, but it is less obvious in other districts. I consider candidates running in open Democratic seats and in open or Republican-held swing seats to be institutionally challenging the party when they run against an establishment local-party favorite.[79] I also include candidates who run on Medicare for All and the Green New Deal but still manage to secure party support. It is difficult to quantify candidates' party challenge in Republican districts where the local Democratic Party can be quite weak—or virtually non-existent—and does not always field candidates (that is, there are no Democrats to challenge).[80] I consider these candidates as part of the insurgency since they too are

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[76] With groups like Our Revolution, Sunrise, and the Democratic Socialists of America which have both a national parent group and local groups that endorse candidates, I included national endorsements and all local ones I could find. The individuals and peripheral insurgent organizations whose endorsements I took into account are Bernie Sanders, Marianne Williamson, Blue America, Candidates with a Contract, Climate Hawks, Common Defense, Courage to Change, Demand Universal Health care, Friends of the Earth Action, Matriarch, People for Bernie, People's Policy Project, Progressive Change Campaign Committee, Progressive Democrats of America, Rose Caucus, YoungPAC, and 350 Action.

[77] Data from Ballotpedia, https://ballotpedia.org/.

[78] As I explain shortly, I employ a partisan makeup/incumbent district classification scheme throughout this thesis which breaks down into four categories: insurgents either run against a Democratic incumbent, run for an open Democratic seat, run in an open or Republican-held swing seat, or run in a safe Republican district.

[79] Robert G. Boatright, "The 2014 Primaries in Context," *Campaign Finance Institute and the Brookings Institution*, 2014, contends that many activists view candidates in open primaries as being either part of the "establishment" or an "insurgent."

[80] Hirano and Snyder, *Primary Elections in the United States*.

seeking institutional power within the Democratic Party through primaries, are endorsed by the same organizations as their counterparts directly challenging Democrats, are considered part of the movement by challengers in Democratic districts, and run without party support.

Ideology is famously difficult to quantify.[81] I use insurgency-aligned extra-party groups' endorsements as a proxy for individual candidates' ideological challenge to the Democratic Party. If candidates are endorsed by one of the core insurgency organizations, for example, Justice Democrats, one endorsement automatically qualifies the candidate as part of the insurgency.[82] The exception to this is the Working Families Party, which in states like New York also endorses some incumbents who do not support insurgent policies. I therefore treated it like a peripheral insurgent organization in the operationalization and a core insurgent organization throughout the rest of the thesis. If candidates are endorsed by organizations at the periphery of the insurgency, for example, the Working Families Party or 350 Action, I cross-checked their other endorsements from other insurgency-adjacent groups and use their support for Medicare for All as a litmus test. I specifically looked at support for Medicare for All since nearly every Democrat supports "universal" health care, the meaning of which is nebulous, while Medicare for All has much clearer policy and ideological insinuations.[83]

The Progressive Insurgency comprises hundreds of candidates in a sustained, semi-coordinated electoral movement rather than an insurgency of a single standard-bearer running for the presidency. I measured individual candidates' membership in the movement via how many

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[81] Philip E. Converse, "The Nature of Belief Systems in Mass Publics (1964)," *Critical Review* 18, no. 1–3 (2006): 1–74.

[82] In 2018, Brand New Congress endorsed several Republicans and, in both years, several of their candidates either did not make it onto the ballot or withdrew before the primary election. Despite their endorsement from a key organization, these candidates are not part of the Progressive Insurgency since they fail to meet the institutional and ideological challenge criteria.

[83] I took data on endorsements from a political transparency database called JustFacts.VoteSmart, organizations' websites, Twitter accounts, and Wikipedia pages and on Medicare for All from candidate websites, Twitter postings, and local and some national news coverage.

other challengers follow them on Twitter, the most political social media platform. Candidates must be followed by at least 10 others—roughly 5% of the total from the two electoral cycles—unless a core insurgent group endorsed the candidate.[84]

The Progressive Insurgency has exploited the post-2016 contention within the Democratic Party over the future direction of the party. Specifically, after Clinton's shocking, unpredicted loss in the 2016 election, the insurgents have tried to use Democratic elites' lack of consensus about what went wrong and therefore what to do about it to try and push the party in their direction.[85]

The insurgency has also exploited vulnerabilities in the neoliberal order to advance within the party. Aiming to abolish and replace rather than restore its dominant political logics and building off of Bernie Sanders's 2016 efforts to do so, the Progressive Insurgency articulates and attempts to expand the Democratic base. They envision the Democrats as a party based in the multiracial working class and have specifically tried to draw in politically-disengaged people of color, young people, and white populist "independents." The insurgents aim to root this electoral base in the material benefits of Medicare for All, the Green New Deal, student debt cancelation, among others, for the realization of a multiracial social democratic order. Representative Ocasio-Cortez declared at a 2020 Sanders rally that their movement is "not pushing the party left" but rather "bringing the party home." She later contextualized her statement in a tweet, writing, "I want to be the party of the New Deal again, the party of the Civil Rights Act, the one that electrified this nation and fights for all people," perhaps providing the best summary of the movement's goals to create a racially-egalitarian social democracy.[86]

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[84] Data from Twitter, https://twitter.com/, in August 2021, where the N is initial broader group of candidates. The few candidates who never had or had deactivated their Twitter accounts by August 2021 when I did this selection were endorsed by a core insurgent organization. In addition to exempting candidates endorsed by a core insurgent organization from this criteria, I made the same exemptions to endorsees of People for Bernie and the Rose Caucus, two peripheral but strongly ideologically-indicative groups.

[85] Masket, *Learning from Loss*.

[86] Alexandria Ocasio-Cortez [@AOC], "I Want to Be the Party of the New Deal Again," Tweet.

The Progressive Insurgency is most closely linked with the electoral sides of the Movement for Black Lives and the climate justice movement. The current iterations of these movements emerged in the early-mid 2010s in response to the murder of Michael Brown and the white supremacist and police killings of Black people and the fight over the Dakota Access Pipeline at Standing Rock and the advent of the climate crisis, respectively.[87] Although it was short-lived and preceded Sanders's first insurgency by five years and the start of the Progressive Insurgency by seven, Occupy Wall Street—in response to the Great Recession and the Democratic government's decision to bail out Wall Street over the working and middle class—was a critical social movement for the renascence of the US left and rise of these insurgencies.[88] The conditions out of which these movements arise, and their proximity to the insurgency, have made racial, economic, and climate justice the insurgency's overarching objectives that their specific policies aim to achieve.

The Progressive Insurgency's rise has been accompanied by the emergence of new and efflorescence of existing extra-party groups that are committed to its success over that of the Democratic Party. Justice Democrats, Brand New Congress, Our Revolution, and Sunrise are new such organizations. Others, like the Democratic Socialists of America and the Working Families Party have existed for decades before the insurgency but have grown in members and/or prominence and gained new electoral relevance in relation to Sanders's bid and the Progressive Insurgency. There are many other new or existing peripheral insurgent organizations, for example, the Progressive Democrats of America, in addition to these core groups. Past individual insurgents have also started their own organizations to help insurgents in future electoral cycles.

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[87] Becky Bond and Zack Exley, *Rules for Revolutionaries: How Big Organizing Can Change Everything* (White River Junction, VT: Chelsea Green Publishing, 2016); Joshua Leifer and Waleed Shahid, "The Realigners: An Interview with Waleed Shahid," *Dissent* 67, no. 1 (2020): 61–69.

[88] Astra Taylor and Jonathan Smuckerman, "Occupy Wall Street Changed Everything," *New York Magazine*, September 17, 2021, https://nymag.com/intelligencer/2021/09/occupy-wall-street-changed-everything.html; Leifer and Shahid, "The Realigners"; Ryan Grim, *We've Got People: From Jesse Jackson to AOC, the End of Big Money and the Rise of a Movement* (Washington, DC: Strong Arm Press, 2019).

A Basic Sketch of the Insurgents

There are 103 progressive insurgents who ran in 2018 and 96 who ran in 2020, for a total of 199, included in this study. (See Appendix A for a table that provides a complete list of the individual challengers that comprise the Progressive Insurgency.) The most salient differences in progressive insurgents' strategy, success, and significance come from what year candidates ran in—2018 or 2020—and what type of district they ran in—against a Democratic incumbent (67 challengers total), in an open Democratic seat (22), in an open or Republican-held swing seat (39), or in a Republican district (71). I classify districts with a Democratic incumbent as "Democratic incumbent" regardless of the partisan makeup of the district.[89] "Open Democratic" districts are those that are safely Democratic (>D+5 in the Cook Political Report) but do not have an incumbent. I classify swing districts (with a Cook PVI score of D+5 to R+5) without a Democratic incumbent as "open or Republican-held swing seat" and those solidly Republican (>R+5) as "Republican districts."[90] I use this district categorization scheme throughout this thesis.

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[89] Democratic incumbency takes precedence over the share of the electorate that votes Democratic due to the importance of insurgents' institutional challenge to their party.

[90] Data from the Cook Political Report, https://www.cookpolitical.com/pvi-0. I do not take into account whether >R+5 districts are open or have a Republican incumbent since the Progressive Insurgency is targeting the Democratic Party as its host, making the incumbency status of Republican districts of negligible importance to insurgents' success there.
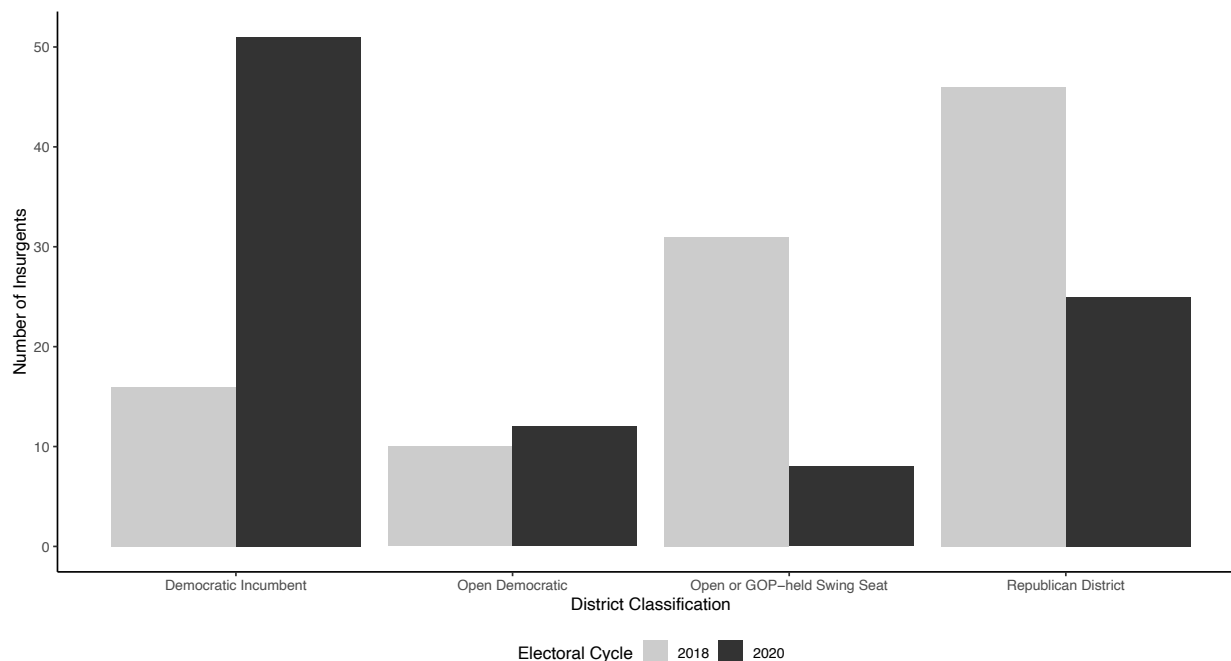
Figure 4: Insurgency by district type and year. Data from the Cook Political Report. N = 199.

As discussed above, a similar number of insurgents ran each year: there were 103 in 2018 and 96 in 2020. But, as Figure 4 shows, there are major differences between the Progressive Insurgency's two electoral cycles in the type of district candidates ran in. In 2018, 16% of progressive insurgents ran against Democratic incumbents compared to 53% of challengers who ran against them in 2020, an over threefold increase. The discrepancy between the years is the smallest in open Democratic seats: 10% of 2018 challengers versus 13% of 2020 challengers ran in these districts. Thirty percent of 2018 insurgents ran in open or Republican-held swing seats compared to only 8% in 2020, a greater than threefold decrease. Similarly, the percentage of challengers running in Republican districts declined from 45% in 2018 to 26% in 2020, nearly declining by half.[91] These changes in where progressive insurgents ran are significant: they are indicative of evolving movement strategy, increased direct contention with the Democratic Party, and changing odds of primary and general election victory, which this and the subsequent chapters

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[91] Data from the Cook Political Report; N = 199.

expand on.

Finally, exactly half of the progressive insurgents are women and just under half are people of color. Their most common professional careers prior to running were as lawyers, as teachers or professors, and as community organizers, issue activists, or political staffers.[92] Critically, only 10.5% of the insurgents had previous experience as an elected office-holder, ranging from school board to city council to state legislature, the importance of which will be made clear in the following chapter.[93] This, however, was part of the initial strategy of core insurgent organizations that intentionally wanted candidates who were not career politicians.[94] As Albert Lee, a 2020 insurgent in OR-03, summed it up, "Very few of us had political experience as candidates but a lot of us were involved with our local parties."[95]

Methods

To answer my exploratory questions about the Progressive Insurgency, I primarily use evidence that I collected from interviews with and surveys of the 2018 and 2020 insurgents. I interviewed 42—22.5%—of the 186 unique candidates (while there are 199 challengers in total, 13 of them ran in both 2018 and 2020).[96] Thirty of the 42 took the survey. (See Appendix B for a categorized list of the challengers I interviewed and surveyed.)[97]

I assembled this group of interviewed and surveyed progressive insurgents through contacting a much larger number former of candidates via a variety of means. I sent candidates direct messages on Twitter and Instagram, emails to addresses I got from campaign or other

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[92] Data from Ballotpedia; N = 199.
[93] Data from Ballotpedia; N = 199.
[94] Rachel Lears, *Knock Down the House* (Jubilee Films; Atlas Films; Artemis Rising, 2019).
[95] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[96] The IRB approved these interviews and surveys.
[97] I collected and analyzed all interview and survey data throughout this thesis in this manner.

personal websites, or emails or texts to addresses and numbers that other challengers gave me. Some, of course, did not respond to my request. I ended up conducting 42 virtual interviews between late June and mid-October 2021. These interviews were semi-structured, where I asked all candidates the same core questions but gave them room to answer with whatever felt most salient. I asked a few questions that were dependent on the challenger's year or type of district.

While 22.5% is a substantial sample of the challengers, it is important to note that it is not a random sample nor does it proportionally resemble the Progressive Insurgency based on candidates' distribution across the years and types of districts. Table 1 compares this sample to the insurgency as a whole. While some are quite close to being proportional—for example, 13% of total insurgents ran in Republican districts in 2020 and these candidates are 13% of interviewed candidates and 12% of surveyed candidates—others are not so representative. Most notably, while only 26% of total challengers ran against a Democratic incumbent in 2020, 48% of interviewees did; this group is overrepresented by nearly a factor of two in the interviews. As important, 23% of total challengers ran in Republican districts in 2018 while only 9% of interviewed candidates came from this group; this category is underrepresented by over a factor of two in the interviews.

Interviewed and Surveyed Insurgents Compared to the Entire Insurgency

District Type	Year	% Total Insurgents (199 Total)	% Interviewed Insurgents (42 Total)	% Surveyed Insurgents (30 Total)
Democratic incumbent	2018	8	13	15
	2020	26	48	55
Open Democratic	2018	5	0	0
	2020	6	2	3
Open or GOP-held swing seat	2018	16	13	9
	2020	4	2	0
Republican district	2018	23	9	6
	2020	13	13	12

Table 1: Interviewed and surveyed insurgents compared to the entire insurgency.

I supplement this original interview and survey evidence with raw data on the insurgents, their policy, the incumbents they challenged, and their districts from databases like Ballotpedia and the Cook Political Report. I did basic descriptive statistical analysis of these and survey data. I hand-coded transcriptions of the interviews based roughly on my questions and other themes that emerged in their responses. Within each broad code (for example, "Democratic pushback" or "Fundraising") I did close-readings of the content, paying attention to both patterns of responses and outliers. Finally, I integrated news stories and primary source narrative history with this original data to tell the full story of the Progressive Insurgency.

The Origins of and Dynamics within the Progressive Insurgency

Bernie Sanders and the Blueprint for Insurgency

> "I've always seen electoral campaigns as parasitic with respect to underlying social movements … I saw what Bernie did in his 2016 race as methodologically innovative. While it was an electoral campaign, it didn't center him. It centered a movement and a set of principles," Shahid Buttar, 2018 and 2020 insurgent in CA-12.[98]

> "Bernie Sanders was publicly urging people across the country to [run]. He said, 'the best thing you can do is to run for office to help build the progressive movement and accomplish important things that we're trying to get done,'" Brent Welder, 2018 insurgent in KS-03.[99]

> "To see AOC do what many thought was impossible in 2018 set the spark that we have a window and an opportunity for more radical politics," Mel Gagarin, 2020 insurgent in NY-05.[100]

> "Medicare for All. The Green New Deal. Those were the two main things that got me into the race," Rachel Ventura, 2020 insurgent in IL-11.[101]

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[98] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[99] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[100] Mel Gagarin, interviewed by Amelia Malpas, September 17, 2021.
[101] Rachel Ventura, interviewed by Amelia Malpas, August 2, 2021.

The Progressive Insurgency began in the 2018 electoral cycle and owes its genesis to Bernie Sanders's 2016 wildly competitive presidential insurgency, and the broader economic and social conditions that contributed to Sanders's success. Without Sanders's bid, there would be no Progressive Insurgency as his campaign was the main source of inspiration for insurgents.[102] 2020 candidates ran because of Sanders as well as Alexandria Ocasio-Cortez and other 2018 insurgents. Challengers also ran to implement policy solutions to the US' crises, especially climate change, privatized health care system, economic inequality and debt, and racial inequality, which they saw the Democratic incumbent that they primaried as being particularly responsible for or resistant to addressing.[103] In the ultimate story of citizen engagement, Arati Kreibich, a 2020 challenger in NJ-05, volunteered to help Josh Gottheimer get elected in 2018 as part of the midterm Democratic wave. Less than two years later, it "was pretty clear" to her that "this was not somebody who was really fighting for us," so she primaried him.[104] In sharp contrast to those involved in the anti-Trump Resistance, only four candidates credited Trump's presidential victory as catalyzing of their candidacy and they tended to be the least left candidates in the movement.[105]

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[102] I began every interview by asking the insurgent what prompted them to run as a challenger.
[103] Progressive insurgent interviews.
[104] Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021.
[105] Progressive insurgent interviews.
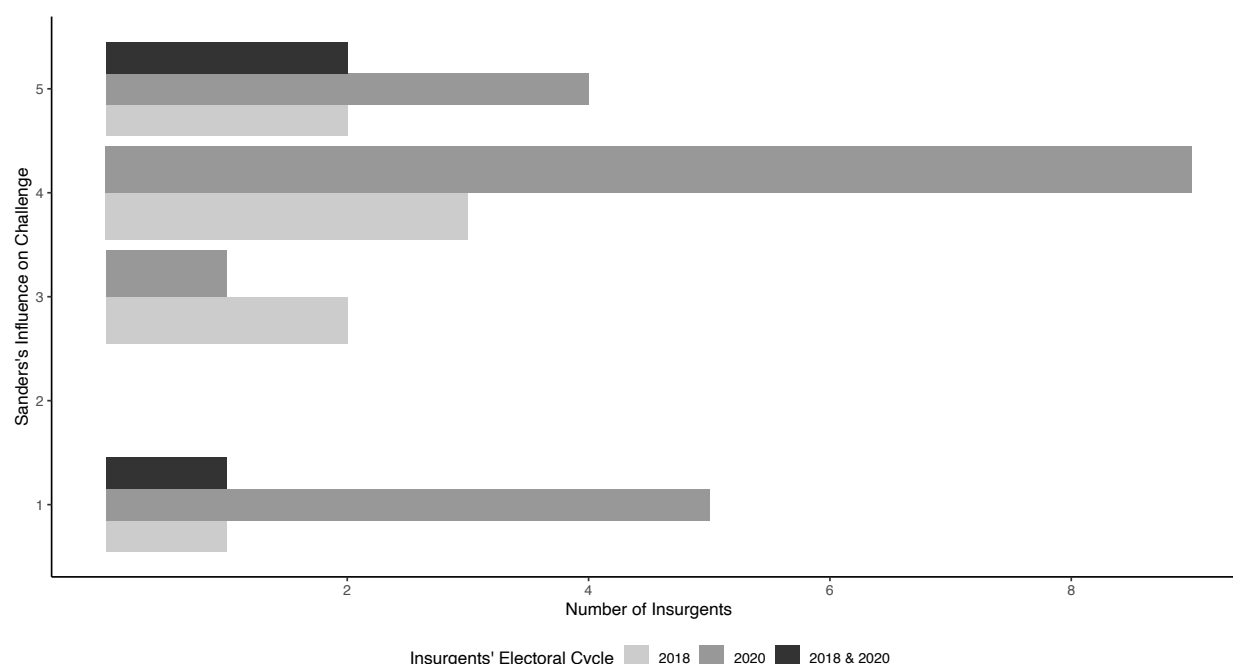
Figure 5: How much did Bernie Sanders's 2016 run influence your decision to run as a challenger? (1 = not at all, 5 = very much so). Survey data. N =27.

Progressive insurgents were overwhelmingly influenced to run by Bernie Sanders's 2016 run—a "4" or "5" in Figure 5.[106] Thirty percent of responded with a "5" and 37% with a "4"; that is, 67% of challengers strongly credited Sanders's first insurgent presidential race as compelling them to run. By contrast, only 22% answered with a "1"—that Sanders did not impact their decision to run.[107] Sanders's influence on challengers' decisions to run varied by the year they ran. Over twice as many 2020 candidates as 2018 candidates responded with a "1." This is likely due to the timing of when 2020 candidates decided to launch their candidacies, which was several years after Sanders's run and when the 2018 insurgents' campaigns were in full swing.

Many aspects of Sanders's run—from his policy agenda to his grassroots fundraising machine to his authenticity to the mass movement of supporters he built—contributed to the

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[106] To further estimate Sanders's role as the catalyst of the movement, I asked challengers to rank on a scale of 1 ("not at all")-5 ("very much so"), "how much did Bernie Sanders's 2016 run influence your decision to run as a challenger?" in the survey.
[107] Survey data; N = 27.

emergence of the subsequent Progressive Insurgency in the House. In particular, it was Sanders's platform and conviction that politics could improve people's lives and deliver solutions to America's myriad crises that brought several formerly politically-disengaged candidates in.[108] As one insurgent said, "The who is Bernie Sanders … He was an inspiration to a lot of different folks, both those who are running as well as those who were disillusioned with our current system of representation."[109] Voters' enthusiasm toward Sanders in 2016 showed another "that America was a lot less brainwashed than I thought we were."[110] Several insurgents ran knowing that their congressional district had been strongly pro-Sanders, which meant both that a sizeable constituency in their district was substantively unrepresented in Congress and that the challengers perceived themselves to have a decent chance of winning an election there.[111]

Sanders's decision to run as an insurgent in the Democratic Party rather than as a third-party candidate, despite his formal status as an independent and a democratic socialist, is likely the most consequential legacy of his first presidential bid. That is, not only did Sanders provide future progressive insurgents with an example of a magnetizing left populist campaign, he did so via contending for institutional power within the Democratic Party—a blueprint for insurgency. Several insurgents grappled with whether to run and infiltrate the Democratic Party like Sanders or abandon the party and run as independents or form a new third party. Ultimately, every challenger that I talked to chose to vie for power via the Democratic primaries (a precondition of being included in this study on insurgency). Some cited upfront hurdles for third-party candidates, such as needing more signatures to qualify for the ballot than candidates running in a major party,

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[108] Bernie Sanders, *Our Revolution: A Future to Believe In* (New York: Macmillan, 2016). Sanders cites changing Democrats' policy agenda—he counted Hillary Clinton's policy concessions as victories—as a main impetus for his challenge, arguing that the Democrats' 2016 platform was the most progressive in the party's history.
[109] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[110] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[111] Progressive insurgent interviews.

as influencing their decision. Others were more aware of the institutional impossibility of mounting a successful third-party bid within the US' electoral system. One reflected, "if progressives don't step in and run as Democrats—the only way to actually win in our electoral system—then you're going to get a corporate Democrat or Republican."[112] As long as the US is "stuck with a two-party system," the easiest way to win power is through the Democratic Party.[113]

Several insurgents became registered Democrats in response to Sanders's bid. One of these candidates even served as a Sanders delegate at the 2016 Democratic National Convention. The Sanders campaign nominated another, along with Nina Turner, as a progressive representative for the writing of the party's 2016 platform.[114] Thus, some future progressive insurgents were not only inspired by Sanders's 2016 run but involved in it.[115] These insurgencies are distinct but linked.

In late 2016 as Sanders's campaign ended and made its initial policy mark on the Democratic Party, Sanders, former staffers, and sympathetic organizers faced questions of what to do with and how to maintain the energy of the movement Sanders's campaign had mobilized. Sanders for his part implored progressives to run for office to continue to the "political revolution."[116] Initially, Sanders's own campaign successor organization, Our Revolution, was focused on repaying favors to the few elected Democrats who had endorsed Sanders's 2016 campaign, regardless of the similarities of their policy agendas.[117] It subsequently became more focused on supporting candidates based on their progressive policy, and therefore part of the emergent insurgent infrastructure.

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[112] Liam O'Mara, interviewed by Amelia Malpas, August 3, 2021; Progressive insurgent interviews.
[113] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[114] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[115] Progressive insurgent interviews.
[116] Brent Welder, interviewed by Amelia Malpas, September 21, 2021. In his account of his primary campaign, *Our Revolution: A Future to Believe In,* published in late 2016, Sanders mentions such candidates running for Congress
[117] Uetricht, "The World Turned Upside Down." This organization also inherited Sanders's famous email list of supporters, which he was loath to turn over to the Democratic Party.

Adding to Our Revolution, former staffers and volunteers laid more groundwork for the extra-party infrastructure required for insurgency.[118] They created groups like Justice Democrats and Brand New Congress, initially joint organizations, aimed at making the continuation of Sanders's political revolution a reality that would become central to the Progressive Insurgency.[119] Their primary goals were to get money out of politics, reduce corporate and oligarchic power, and represent working people in Congress.[120] Initially, Brand New Congress operated on a theory of "post-partisan" class-based political change, believing that with the right working-class-oriented platform, progressives could win in any district, regardless of its partisan makeup or their identity. As such, it endorsed several independent and Republican candidates in addition to many running as Democrats. In contrast, as its name suggests, Justice Democrats was always focused on replacing corporate Democrats with truly progressive Democrats.[121] Both groups aimed to maintain the electoral energy of Sanders's insurgencies across elections rather than letting it dissipate between them.[122]

Although their strategy has changed since their launch, the founders of these groups were erudite, historically informed, and strategic from the start about how apply pressure and force political change in the US' two-party system.[123] That is, they saw insurgency within the

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[118] Marantz, "Are We Entering a New Political Era?" Many of them also participated in Occupy Wall Street five years earlier.

[119] Leifer and Shahid, "The Realigners"; Marantz, "Are We Entering a New Political Era?"; Grim, *We've Got People*; Ryan Grim, "How Bernie Sanders Accidentally Built a Groundbreaking Organizing Movement," *The Intercept*, May 28, 2019, https://theintercept.com/2019/05/28/bernie-sanders-accidental-organizing-movement-book/.

[120] Lears, *Knock Down the House*.

[121] Grim, *We've Got People*; Marantz, "Are We Entering a New Political Era?"

[122] Leifer and Shahid, "The Realigners"; Brendan O'Connor, "When the Party's Over," *The Baffler*, May 4, 2021, https://thebaffler.com/salvos/when-the-partys-over-oconnor. Astra Taylor, "A New Group of Leftist Primary Challengers Campaign Through Protests and the Coronavirus," *The New Yorker*, June 17, 2020, https://www.newyorker.com/news/the-political-scene/a-new-group-of-leftist-primary-challengers-campaign-through-protests-and-the-coronavirus.

[123] Leifer and Shahid, "The Realigners"; O'Connor, "When the Party's Over." These groups stand in contrast to the unserious third "party" organization also started by Sanders alumni, the Movement for a People's Party, home to the hyper-online left whose only organizing is via Twitter trolling and purpose is to proclaim their superiority through not associating with the Democratic Party or even elected progressive insurgents.

Democratic Party, a la Bernie Sanders, as the only viable way for progressives and leftists to pursue institutional power in the United States and in so doing, form a great enough bloc so as to extract concessions from the moderate faction of the party. As one of Justice Democrats's co-founders, Waleed Shahid explained, in a country with proportional representation, they would "be called either social democrats or democratic socialists … Our party would win twenty-five per cent of the seats, and we'd have real power." Given how the US' electoral system results in a particularly rigid two-party system, "the way to get there is to run from within one of the two parties and, ultimately, try to take it over."[124] And so Justice Democrats and Brand New Congress began recruiting congressional candidates via community nominations of ordinary people largely (and intentionally) without prior elected experience.[125]

These candidates in the 2018 electoral cycle were the first wave of the Progressive Insurgency. Nearly all ended up losing their elections. But, crucially for the future of the political movement, insurgent Alexandria Ocasio-Cortez (colloquially known by her initials AOC) defeated Democratic incumbent Joe Crowley in New York's 14th congressional district in June 2018 and insurgent Ayanna Pressley toppled Democratic incumbent Mike Capuano in Massachusetts's 7th congressional district in September that year. Ocasio-Cortez's victory was so shocking that her name became shorthand for the movement. Rashida Tlaib and Ilhan Omar, two other insurgents running in open Democratic seats in Michigan and Minnesota, respectively, also won. Together, these four elected insurgent women of color whose politics generally place them on the left edge of the Progressive Insurgency would become known—either affectionately or derogatorily, depending on the speaker's politics—as "the Squad" in American political discourse. Although they broadly share politics with the other elected insurgents, their disposition, outspokenness, and

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[124] Marantz, "Are We Entering a New Political Era?"
[125] Ibid.

charisma made them into an instant media phenomenon. Katie Porter and Mike Levin also won election to Congress, flipping seats in Orange County, California, along with several other lower-profile insurgents, for a total of nine. Winning election to Congress was hard for the insurgents, and it was rare. But 2018 showed that it was not impossible.

Just as Sanders's 2016 presidential insurgency inspired the first progressive insurgents in 2018, they, in turn, inspired challengers to run in 2020.[126] On the extent that these initial insurgents influenced their subsequent bids, thirty-eight percent of 2020 challengers reported the highest level of influence, "5," and 19% each responded with "4," "3," and "1." These answers are more evenly distributed than the progressive insurgents' on Sanders as an influence, but still cluster (57%) around the highest two levels of influence. Also of interest is that the candidates who ran in both election years all reported lower levels of influence, between "1" and "3."[127] Overall, these results show that a supermajority of challengers were strongly influenced by Sanders's 2016 run and that a majority of 2020 candidates were similarly influenced by progressive insurgents in the prior electoral cycle.

A significant number of 2020 insurgents specifically cited Ocasio-Cortez, often along with Sanders, as moving them to run. One candidate distilled it, "Obviously anyone our age is going to say AOC based on what she did her race."[128] Another described Ocasio-Cortez's breakthrough in 2018 simply as "transformational."[129] Her campaign confirmed to others that it was possible to run for Congress as a non-corporate candidate. One challenger even worked for Ocasio-Cortez before deciding to become an insurgent himself.[130] But it was not only the few victorious 2018 insurgents

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[126] To uncover more of these dynamics between the original Sanders insurgency and the progressive congressional insurgents who ran in 2018, I also asked 2020 challengers (including those who ran in both years) to rank, "how much did 2018 challengers' candidacies influence your decision to run?"
[127] Survey data; N = 21.
[128] Adam Christensen, interviewed by Amelia Malpas, September 23, 2021.
[129] Tahirah Amatul Wadud, interviewed by Amelia Malpas, September 23, 2021.
[130] Progressive insurgent interviews.

who inspired new challengers to run in 2020: they were also influenced to do so by candidates who lost their elections. These dynamics are reminiscent of Sanders's presidential *loss* as a catalyst for the Progressive Insurgency. Indeed, Sanders's loss leading to the emergence of the Progressive Insurgency points to the impact that insurgents can have on their host parties and national politics even then they lose their elections.[131] Within the insurgency, for instance, David Kim, a 2020 challenger in CA-34 who ran against Democrat Jimmy Gomez, became involved in politics through a 2018 Green Party candidate's fairly successful primary and general election challenge against Gomez.[132] Kim decided to run in 2020 to build off that challenger's success and carry it over the finish line, which he was only a few points away from doing.[133] This suggests that these temporal dynamics of the insurgency will continue in future elections.

Are They Lone Insurgents or Is It a Movement?

The Progressive Insurgency is a sustained, semi-coordinated insurgency made up of many candidates across multiple races rather a one-off presidential insurgency concentrated on a single candidate.[134] As Figure 6 shows, progressive insurgents overwhelmingly indicated that they felt like they were part of a movement: 83% rated their sense of it being a movement in the highest categories, 38% with "5" and 45% with "4."[135] Challengers' sense of being part of a movement confirms interesting dynamics of insurgencies directed at lower offices. Such an insurgency and the nationalization of US politics in recent decades have dovetailed to create an environment where

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[131] Tulis and Mellow, *Legacies of Losing in American Politics*.

[132] California has non-partisan top-two primary elections. The Green Party challenger's candidacy indicated voter appetite for progressive politics in the district, but he was not an insurgent given that he did not contest for power through the Democratic Party.

[133] David Kim, interviewed by Amelia Malpas, September 12, 2021; Progressive insurgent interviews.

[134] I was interested in insurgents' perceptions of running alone or as part of a movement. In the survey, I asked challengers, "what was your sense of being part of an electoral movement, not just a lone challenger" on a scale of 1-5.

[135] Survey data; N = 29.

the insurgents and their supporters view any and all successes as their own, regardless of whether it is their district or not. "I'm trying to help build a movement because it's necessary," one challenger said, "whether or not I succeed."[136] Another chalked it up to "a difference between politics as an expression of a career-building sensibility versus politics as an expression of a movement."[137]
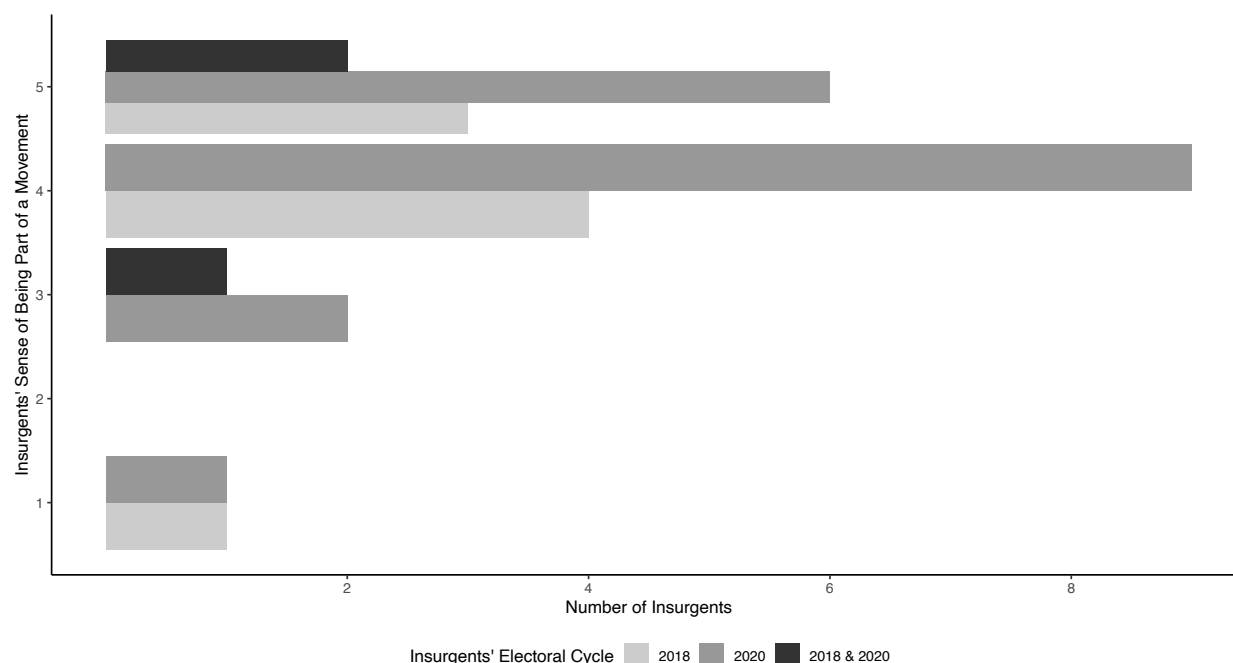
Figure 6: What was your sense of being part of an electoral movement, not just a lone challenger? (1 = not at all, 5 = very much so). Survey data. N = 29.

Challengers experienced a strong community within the Progressive Insurgency,[138] even if some want to see "more solidarity between candidates" after their races end.[139] But within this near unanimity, they cited different sources of community within the insurgency. By far the most common source for insurgents was sharing endorsements from the same organizations, especially Brand New Congress, followed by regional proximity, shared identity, type of district, or media

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[136] Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021.
[137] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[138] In the interviews only one candidate disagreed, saying that he believed in community within the insurgency during his first run but came to see it as "transactional" during his second.
[139] Jason Call, interviewed by Amelia Malpas, August 10, 2021.

events. A geographical basis for networks of challengers was particularly pronounced in New York City, where the entire local 2020 Brand New Congress slate became close, as well as in New Jersey, Texas, and California. One 2018 Michigan insurgent helped a challenger in an adjacent district get a Brand New Congress endorsement.[140] Women and Black insurgents were the most likely to mention that their intra-insurgency community came from their identity, while those who mentioned district characteristics as bonding them to other challengers principally ran in Republican districts.[141]

A plurality of insurgents credited Brand New Congress with facilitating a community within the insurgency. As a 2020 Ohio challenger said, "as part of Brand New Congress, we had a built-in community of progressive challengers that were all running together."[142] Candidates met each other at a networking and training event held by Brand New Congress for its endorsees in Washington, D.C.; challengers made connections with peers running across the country and found a supportive and empathetic network. Sarah Smith, a 2018 WA-09 insurgent said, "There's no other experience I've had in my entire 33 years on this earth that is like [running for office]," which only other challengers really understood.[143] Candidates endorsed by both groups specifically credited Brand New Congress with putting much greater effort into forging social connections between candidates than Justice Democrats. This points to the different resources that core insurgent organizations gave their candidates, which the next chapter explores in greater depth.

Finally, losing insurgents were quick to note if they had met in passing or even become friends with insurgents who won election to Congress, largely because of shared endorsement by organizations like Brand New Congress or geographical proximity. In particular, they mentioned

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[140] David Benac, interviewed by Amelia Malpas, September 16, 2021.
[141] Progressive insurgent interviews.
[142] Nick Rubando, interviewed by Amelia Malpas, August 30, 2021.
[143] Sarah Smith, interviewed by Amelia Malpas, June 29, 2021.

knowing Representatives Alexandria Ocasio-Cortez, Cori Bush, Jamaal Bowman, Mondaire Jones, and Marie Newman through their shared experience running for Congress as part of the Progressive Insurgency. One challenger even posited that a campaign rally in the lead-up to his 2018 primary election was where Sanders and Ocasio-Cortez, just months off her primary victory, first met in person.[144]

Insurgent Policy Ideas and the Expansion of the Public's Political Imagination

Electoral insurgency, I theorize, is a simultaneous institutional and ideological challenge to a host party from within. The Progressive Insurgency can hardly be separated from its political ideas and its broader objective to replace dominant political logics and institutional arrangements of the dominant neoliberal order with a social democratic one. It aims to initiate this through reorienting the Democratic Party's policy priorities and expanding the public's imagination of what is politically possible, which has proved difficult.[145] Two co-founders of the core insurgent organizations Justice Democrats and Sunrise recognized that the insurgency's long-term objective of "an era-defining realignment is perhaps the biggest goal a movement can aspire to in American politics."[146]

The Sources and Content of Insurgents' Platforms

> "I'll fight for Medicare for All until the day I die," Julie Oliver, 2018
> and 2020 insurgent in TX-25.[147]

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[144] Brent Welder, interviewed by Amelia Malpas, September 21, 2021; David Weigel, "Can a Liberal Agenda That Sells in the Bronx Win over Voters in Kansas?," *Washington Post*, July 10, 2018, https://www.washingtonpost.com/politics/can-a-liberal-agenda-that-sells-in-the-bronx-win-over-voters-in-kansas/2018/07/10/1676ed84-7ee8-11e8-bb6b-c1cb691f1402_story.html.

[145] Marantz, "Are We Entering a New Political Era?"

[146] Mark Engler and Paul Engler, "Why the Left Sees an Opening for a 'Realignment' in U.S. Politics," *In These Times*, March 25, 2021, https://inthesetimes.com/article/left-realignment-democrats-aoc-bernie-sanders.

[147] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.

> "When it comes to things like climate change, affordable housing, health care, minimum wage, taxing the rich—a whole plethora of things that are all interconnected—we have to solve all of them at the same time," Mark Gamba, 2020 insurgent in OR-05.[148]

> "I basically ran on a Black Lives Matter anti-surveillance platform two years before the George Floyd uprising. It was interesting to see people get it two years later," Shahid Buttar, 2018 and 2020 insurgent in CA-12.[149]

With a few exceptions, progressive insurgents attributed their policy ideas to Bernie Sanders, core insurgent or other progressive organizations, and personal issue advocacy.[150] That Sanders's platform was a font of policy for a sizeable number of challengers is not surprising, given the Progressive Insurgency's genesis in Sanders's policy-focused 2016 presidential run. One challenger who credited Sanders also took policy from Andrew Yang's and Marianne Williamson's respective 2020 presidential campaigns. Due to the publicity and duration of their campaigns, presidential candidates have a unique ability in American politics to raise the salience of a particular issue or introduce voters to new ideas.[151] Such campaigns turned previously obscure policies like Medicare for All or Universal Basic Income into household ideas, the mantel of which these challengers took up and their support of which helped mark candidates running across the country as part of the movement.

Of the insurgents whose policy came from an organization, half took ideas from Brand New Congress's 21st Century Bill of Rights platform, which some of the first progressive insurgents in 2018 helped to write. One candidate experienced mild pressure from the organization

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[148] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.
[149] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[150] In the survey, I asked challengers to "briefly explain where policies in your platform came from." Survey data; N = 23. The remainder cited their campaign team, their selves, or their community as the source of their platform.
[151] Rapoport and Stone, *Three's a Crowd*; Larry M. Bartels, "Priming and Persuasion in Presidential Campaigns," in *Capturing Campaign Effects*, ed. Henry E. Brady and Richard G. C. Johnston (Ann Arbor: University of Michigan Press, 2009).

to "fully adopt their policy proposals" even though their campaign ultimately took some policies "even farther" to the left.[152] Issue advocacy is the final main source of insurgents' platforms. Some cited social justice broadly, while others ran to change policy in specific areas like climate change, racial inequality, and health care. One was "known as the health care candidate because of [their] advocacy of single-payer health care."[153] Another's "socio-abolitionist beliefs" drove their policy.[154] These shared sources of policy ideas contribute to the policy cohesion of the several hundred individual candidates that make up the Progressive Insurgency.

The Progressive Insurgency's name brand policies are Medicare for All—which would replace the US' existing publicly-subsidized private health care system with a national single-payer system—and the Green New Deal—which would decarbonize the US economy while revitalizing labor in a manner and on a scale reminiscent of the New Deal. These two policy ideas are so associated with the insurgency that they have become a shorthand way of understanding where Democratic incumbents and candidates fall ideologically. Beyond these policies, the insurgents champion other economic and social policies that would similarly redistribute resources downward and address American inequality systemically. These include canceling student debt, dramatically increasing the progressivity of the wealth tax or "eating the rich," raising the minimum wage substantially and making it easier to unionize a workplace, reforming and reducing the scope of the carceral state, and decriminalizing cannabis, sex work, and some forms of immigration. Important for the institutional context of insurgency, some of these candidates and Justice Democrats also advocate for democratic reform that would remake the US' electoral system and allow for the emergence of an electorally-viable left party.[155] These policies would also

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[152] Survey data; N = 23.
[153] Survey data; N = 23.
[154] Stevens Orozco, interviewed by Amelia Malpas, August 17, 2021.
[155] "Platform," *Justice Democrats*, https://justicedemocrats.com/platform/.

particularly benefit constituencies that insurgents see as critical to expanding the Democratic base and potentially rooting a new dominant political order.

Following in Sanders's footsteps, insurgents emphasized that it is not their policies but rather the unequal status quo that is "radical" and rhetorically connected their ambitions to those of past economic populist, labor, and civil rights movements in the United States.[156] Perhaps the best illustration of insurgents' strategic tendency to couch new progressive policies in American political history is the name of their signature Green *New Deal*, which familiarizes the plan to the public through its reference to past transformative American policy. This corresponds with Ocasio-Cortez's assertion that the movement is "bringing the party home," which similarly makes their ideas seem more viable because they have a basis in the Democratic Party's past.[157]

Insurgent Ideas Versus the Public Political Imagination

> "Our government can pay for any goddamn thing it wants to pay for. The problem is we don't have the political will," Jason Call, 2020 insurgent in WA-03.[158]

> "It's our government, they're our tax dollars, and just laying out, 'do you want your tax dollars to continue to bomb kids in Palestine? Do you want your tax dollars to pay for health care? It's your choice,'" Rachel Ventura, 2020 insurgent in IL-11.[159]

> "Running on these issues really gave us the opportunity to connect with so many people … all this struggle that they have been through, and where fighting for these policies makes sense to them, because they've lived through the loss or they're living through it even though they did everything right," Angelica Dueñas, 2020 insurgent in CA-29.[160]

> "When your message is pushing for radical change and revolution,

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[156] Bernie Sanders, interviewed by Amelia Malpas, April 4, 2022; O'Connor, "When the Party's Over."
[157] Alexandria Ocasio-Cortez [@AOC], "I Want to Be the Party of the New Deal Again," Tweet.
[158] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[159] Rachel Ventura, interviewed by Amelia Malpas, August 2, 2021.
[160] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021.

> that challenges individuals and makes them uncomfortable,"
> Anthony Clark, 2018 and 2020 insurgent in IL-07.[161]

> "I don't think there's any interest in expanding what's possible,"
> Laura Moser, 2018 insurgent in TX-07.[162]

Progressive insurgents reflected about their experience running to expand the public's imagination of what is politically possible beyond the current hyper-individualized, market-based mainstream. Bernie Sanders described his campaigns and the Progressive Insurgency as engaging with "what politics is about: changing consciousness in America."[163] It was difficult for insurgents to overcome Americans' cynicism about what their government can do, convince voters that the government can pay for ambitious social policy that tends to be quite popular among the public. Insurgents also found that voters' class position colored their receptivity to insurgents' egalitarian policies, although not always in straightforward ways.

It was hard for progressive insurgents to convince Americans that change from government policy is possible. Morgan Harper, a 2020 candidate in OH-03, spent a lot of time trying to persuade voters that there are "government solutions to everything we're talking out … in terms of problems in housing, health care, police violence."[164] Insurgents would point to ambitious government policy from generations past to demonstrate that transformative policy is feasible. Patrick Nelson, a 2018 challenger in NY-21, told people, "A generation ago, a president of the United States said we would go to the moon within a decade. We did. Don't tell me we can't pass Medicare for All. I mean, which is easier?"[165] Several posited that this apathy is the result of both Americans' experience of an unresponsive government and intentionally cultivated by politicians

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[161] Anthony Clark, interviewed by Amelia Malpas, September 22, 2021.
[162] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.
[163] Bernie Sanders, interviewed by Amelia Malpas, April 4, 2022.
[164] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.
[165] Patrick Nelson, interviewed by Amelia Malpas, August 17, 2021.

and the media to keep voters from demanding substantive policy change that would disrupt the current distribution of political and economic power.

Insurgents, of course, had to perpetually answer the question that haunts the American left, "how can the government pay for that?" They tried to counter this common question about an ultimately non-existent problem for the US government by getting voters to realize that they did not need to think about federal government spending this way. Jen Perelman, a 2020 challenger in FL-23, said that while some people did not change their minds, "for every one of those people, I would have 10 people that looked at me and said, 'oh, I never really thought of it like that before.'"[166] This was especially true when insurgents countered that Americans almost exclusively think this way for social policy that helps people and rarely for increasing military or carceral budgets. Some voters' and opponents' receptivity to their ideas, like Medicare for All, changed during their races as they became more familiar with them through the insurgent. Primarying another Democrat provided insurgents with an opportunity to talk about policy differences between Democrats with low-information voters and educate constituents about an incumbents' actual voting record and policy stances.

Whatever success insurgents had at changing how voters think about policy likely has to do with the broad popularity of many of their universal policies among the public, including their signature issues of Medicare for All, the Green New Deal, and student debt cancelation.[167] "It's

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[166] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.

[167] Bradley Jones, "Increasing Share of Americans Favor a Single Government Program to Provide Health Care Coverage," *Pew Research Center*, September 29, 2020, https://www.pewresearch.org/fact-tank/2020/09/29/increasing-share-of-americans-favor-a-single-government-program-to-provide-health-care-coverage/; Julia Manchester, "70 Percent of Americans Support 'Medicare for All' Proposal," *The Hill*, October 22, 2018, https://thehill.com/hilltv/what-americas-thinking/412545-70-percent-of-americans-support-medicare-for-all-health-care/; Dino Grandoni and Scott Clement, "Americans like Green New Deal's Goals, but They Reject Paying Trillions to Reach Them," *Washington Post*, November 27, 2019, https://www.washingtonpost.com/climate-environment/2019/11/27/americans-like-green-new-deals-goals-they-reject-paying-trillions-reach-them/; Danielle Deiseroth and Lew Blank, "Voters Overwhelmingly Support the Green New Deal," *Data For Progress*, April 19, 2021, https://www.dataforprogress.org/blog/2021/4/19/voters-support-green-new-deal; Carmen Reinicke, "More than

workers, wages, and weed or climate, care, jobs, and justice," said one challenger, "it doesn't have to be wonky."[168] Eva Putzova elaborated that insurgents' policies are "where the public sentiment is. There is no question that everybody agrees that we need a health care system where everybody gets health care and people are not financially ruined."[169]

Insurgents reported notable differences in voters' receptivity to their ideas based on voters' class, although their experiences of this do not cohere into one simple narrative. Several candidates running in poorer districts found that their policy proposals seemed like common sense—no expansion of constituents' imagination necessary—to people with direct negative experience of, say, unaffordable health care or inadequate income. About the same number of challengers cited running in such districts, especially those with significant linguistic diversity, as hindering their ability to influence voters' views on their policies. In contrast, insurgents were nearly unanimous about affluent and upper middle-class voters' interest in their platform: they were not. As one challenger summarized it, "the pushback almost always comes from the upper middle class white people, who are comfortable with their housing, with their health care, with their retirement."[170] Along these lines, Sarah Smith, a 2018 challenger in WA-09, said that her district that includes part of Seattle is "gerrymandered around wealth and inequality and race."[171] Smith and Shahid Buttar, who ran both years in CA-12 which includes nearly all of San Francisco, both mentioned that the arrival of the climate crisis in wealthy communities on the west coast has recently begun to change some minds. Buttar distilled it: "I think the imagination here has been expanded if only

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60% of Voters Support Some Student Loan Debt Forgiveness," *CNBC*, December 22, 2021, sec. Invest in You: Ready Set Grow, https://www.cnbc.com/2021/12/22/more-than-60percent-of-voters-support-some-student-loan-debt-forgiveness.html.

[168] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.

[169] Eva Putzova, interviewed by Amelia Malpas, July 23, 2021.

[170] Jason Call, interviewed by Amelia Malpas, August 10, 2021.

[171] Sarah Smith, interviewed by Amelia Malpas, June 29, 2021.

because the wildfires have forced people to be realize something here is not working."[172]

Insurgents' Ideology

> "I think my positions are normal. Human rights and human dignity. Other people consider me radical. I came up under … Chairman Fred Hampton['s legacy,]" Anthony Clark, 2018 and 2020 insurgent in IL-07.[173]
>
> "I still don't consider myself a socialist or democratic socialist, maybe a market socialist or social democrat … I'm basically just a moderate European voter. We're in such a conservative, reactionary, right-wing country, that anybody that's even barely center left is considered a radical leftist," Patrick Nelson, 2018 insurgent in NY-21.
>
> "I was told by various political consultants that I needed to stop talking about race and start talking about class. They used AOC as an example. 'Look at her, she's not really talking about race, she's talking about class.' That tells you race is not the elephant in the room. It's the room," Saira Rao, 2018 insurgent in CO-01.[174]

While the Progressive Insurgency is at the left tip of the left wing of the Democratic Party, there is considerable diversity in insurgents' specific ideological orientations and analyses of capitalism, class, and race. On the left end of the insurgency, a considerable number of insurgents, like Sanders, identify as democratic socialists, many of whom are members of the Democratic Socialists of America (DSA). One such candidate identified as an "anti-colonial socialist" while another called for emulation of the Black Panther Party "where you truly push for class unity and recognize the struggle is universal."[175] Yet another identified as a "libertarian socialist" due to

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[172] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[173] Anthony Clark, interviewed by Amelia Malpas, September 22, 2021.
[174] Saira Rao, interviewed by Amelia Malpas, September 16, 2021.
[175] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021; Anthony Clark, interviewed by Amelia Malpas, September 22, 2021.

their strong support of civil liberties.[176] More insurgents' analysis of US inequality centered

capitalism and therefore class or class with race than centered race by itself, although a few

challengers' analysis did.[177] On the opposite end of the insurgency, candidates were not democratic

socialists. Some suggested instead that they were social democrats or believed that capitalism

could be salvaged with structural reforms. One such candidate clarified, "I was deemed progressive

because I supported Medicare for All. I am not a DSA candidate in any sense."[178] Still, these latter

candidates support key Progressive Insurgency policies and are to the left of nearly every Democrat

in Congress.

One of the distinguishing features of an ideological insurgency that aims to drastically

reorient dominant political logics is that insurgents elevate their political ideas and principles

above their personal victory in a particular election. This is largely true for members of the

Progressive Insurgency, where 90% of insurgents responded with the two highest levels that their

campaign was more about their ideas than their personal victory.[179] While this question is

subjective and its personal slant likely prompted the insurgents to inflate their answers relative to

what they felt when they were active candidates, it does demonstrate that the progressive

insurgents are overwhelmingly running to promote policy ideas rather than just secure personal

political power.

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[176] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.

[177] There has been a high level of political discourse on Democrats' messaging on race and class over the last few years and what is most effective, some of which is warranted and some of which overemphasizes the impact of Democrats' messaging alone on their electoral success. See for example, Ezra Klein, "Opinion | David Shor Is Telling Democrats What They Don't Want to Hear," *The New York Times*, October 8, 2021, sec. Opinion, https://www.nytimes.com/2021/10/08/opinion/democrats-david-shor-education-polarization.html and Ian Haney López, *Merge Left: Fusing Race and Class, Winning Elections, and Saving America* (New York: The New Press, 2019).

[178] Liuba Grechen Shirley, interviewed by Amelia Malpas, September 1, 2021; Progressive insurgent interviews.

[179] I asked the challengers in the survey to indicate the veracity of the statement, "my campaign was more about policy ideas than my personal victory" on a scale of 1-5, where 1 is "not at all" and 5 is "very much so." Survey data; N = 30.

The Progressive Insurgency's Relationship to the Democratic Party

Incumbents Under Insurgent Fire

Which Democratic incumbents are insurgents targeting? Insurgents, who are young by the standards of American politics, commonly allege that incumbents are out of touch with their districts—in line with a long history of ideological challengers' justifications for their primary contestation—especially when it comes to issues disproportionately affecting young people.[180] As they advertised during their campaigns, multiple insurgents ran against incumbents that had been in Congress for longer than they had been alive. Figure 7 shows the distribution of challenged incumbents by their tenure in Congress. There is a large range: one incumbent had only been elected a year prior while another had been in Congress for 39 years. The median tenure of the challenged incumbents is 17 years, with a quarter having been in office for fewer than 7.5 years and a quarter for more than 23 years. The Democrats that the insurgents have primaried have been in office for extensive periods of time.[181]

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[180] Boatright, *Getting Primaried*.
[181] Data from the House of Representatives, https://clerk.house.gov/member_info/Terms_of_Service.pdf; N = 59.
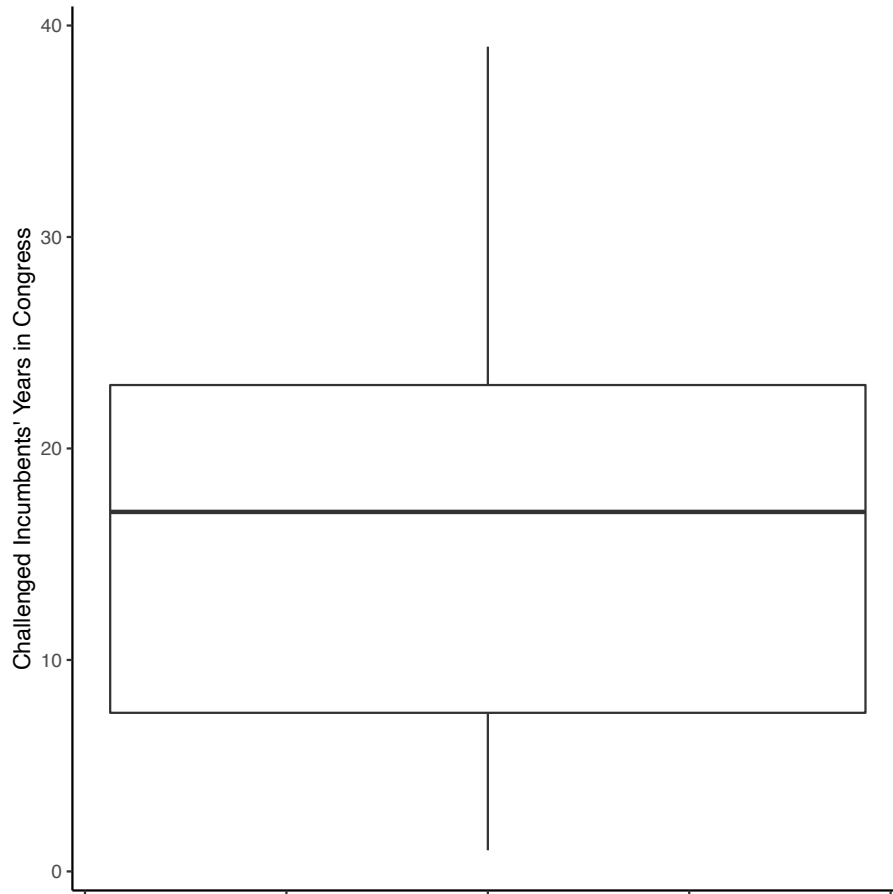
Figure 7: Challenged Democratic incumbents by years in office. Data from the House of Representatives. N = 59.

More illustrative and important for the ideological component of insurgency is the ideological breakdown of the Democratic incumbents that the progressive insurgents challenge. While primarying an incumbent is insurgents' most direct institutional challenge to the party, insurgents' challenges have different implications for policy change depending on whether they run against Democrats politically closest to or furthest from them. The distribution of challenged incumbents' DW-NOMINATE scores, which political scientists frequently use to ascertain politicians' ideology, did not reveal any notable patterns.[182] Challenged incumbents' membership

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[182] Data from VoteView, https://voteview.com/; N = 59 (67-8 for multiple challengers in the same race; incumbents challenged both years counted twice). Further, as Karol, *Party Position Change* argues, DW-NOMINATE scores do not measure a member of Congress's ideological position within the party but rather how often they vote with their party on legislation. This coding scheme assumes that Democrats who vote with the party less are inherently doing so because they are more conservative rather than left of the congressional Democrats; for example, it lists Representative

in four ideological caucuses (the Progressive Caucus and now-defunct Medicare for All Caucus on the left and the New Democrat Coalition and Blue Dog Caucus in center and on the right) provided a better indication of their ideological positioning within the Democratic Party. Each column in Figure 8 shows how many incumbents were in a particular combination of caucuses, such as being in both the New Democrats Coalition and Blue Dog Caucus or only the Progressive Caucus.[183] Only 24% of primaried incumbents were not members of any of the four caucuses.
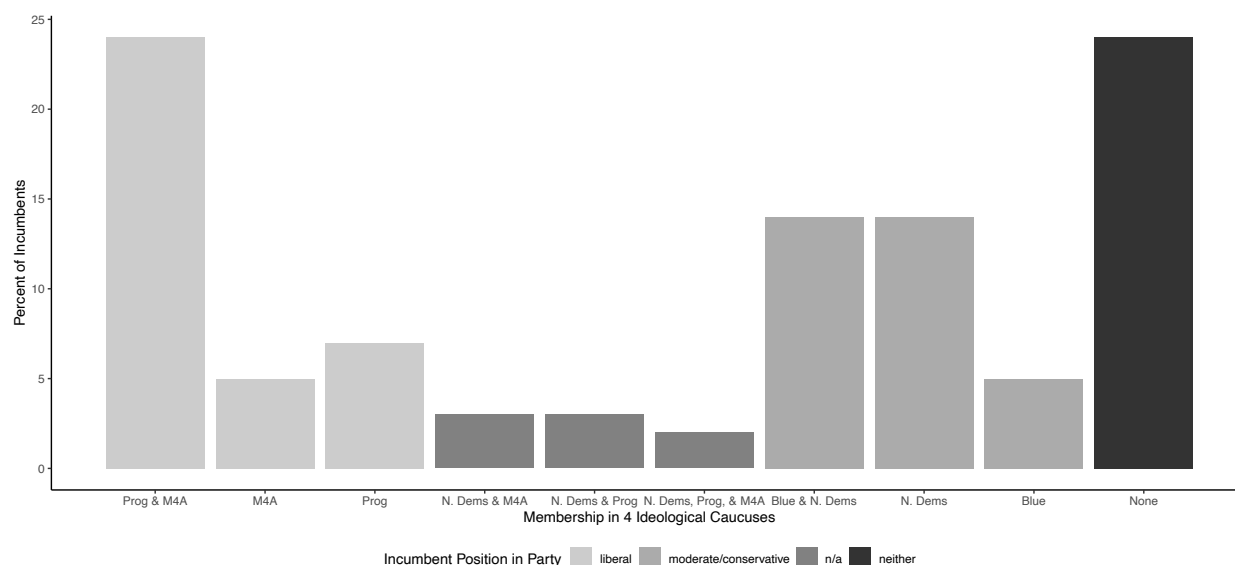
Figure 8: Challenged Democratic incumbents by caucus membership. M4A = Medicare for All Caucus, Prog = Progressive Caucus, N. Dems = New Democrats Coalition, Blue = Blue Dog Caucus. Data from caucus websites and Wikipedia pages. N = 59.

On the left, 24% of challenged incumbents were members of both the Progressive and Medicare for All caucuses, with an additional 5% and 7% in just the Medicare for All or Progressive caucuses, respectively. In total, then, 36% of the challenged incumbents are associated with the liberal Democratic caucuses. In the middle and on the right, 14% of challenged incumbents are members of both the Blue Dog Caucus and New Democrats Coalition, with an

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Ocasio-Cortez as one of the more conservative Democrats which is obviously not true. Instead, DW-NOMINATE scores show how often members of Congress vote with their party.

[183] Data from caucus websites and Wikipedia pages; N = 59.

additional 14% in just the New Democrats and 5% in just the Blue Dogs. In total, 33% of challenged incumbents are members of the moderate/conservative Democratic caucuses.[184] The remaining 7% of incumbents are members of caucuses on both flanks of the party. Prior to the Progressive Insurgency, ideologically-challenged Democrats tended to be more "out of touch," i.e., conservative than their constituents or the median voter in their district, than did ideologically-challenged Republicans.[185] But the insurgency could be changing these dynamics in the Democratic Party to more closely parallel the Republicans through its frequent challenges to liberal Democrats.

Notably, progressive insurgents were slightly more likely to challenge a Democratic incumbent in the liberal caucuses than in the conservative caucuses. It makes sense why challengers would target conservative Democrats, especially in deeply Democratic districts, as they are the Democrats furthest from the insurgents ideologically and could obstruct the passage of their policy in Congress. There are more complex factors behind insurgents' challenge to liberal Democrats, especially those in a caucus dedicated to one of the insurgency's key policies. These incumbents likely attract so many challenges for three reasons: insurgents can call them out as the real obstacle to a policy like Medicare for All because the latter advertise their progressive stance without actually organizing to implement the policy in insurgents' eyes; insurgents can reframe what it means to be a "progressive" Democrat around their policy stances rather than the incumbent's, which will pull the incumbent along with them if they are attached to being a progressive Democrat; and because the voters of these districts have, via election of the incumbent, indicated some appetite for progressive politics. Candidates who challenged liberal Democrats

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[184] Because the Progressive Insurgency is challenging the Democratic Party from the left, I am most interested in dissecting the dynamics of primaried incumbents in the liberal caucuses versus those that are not, which is why I group the moderate and conservative caucuses together here and later in this thesis.
[185] Boatright, *Getting Primaried*; Jacobson and Carson, *The Politics of Congressional Elections*.

cited the incumbents' duplicity on such progressive issues as impeding their progress and asserted that if elected, their verbal support for progressive policy would be accompanied by real advocacy toward those ends, unlike the incumbent's.

One challenger to a Blue Dog Democrat in Oregon, which has a relatively small congressional delegation, worried that other insurgent challenges to liberal incumbents in the state hurt their chances. Specifically, that there were multiple challenges diffused resources between their campaigns and distracted from the fact that the two incumbents' policy stances were radically different—compared to a Progressive Caucus Democrat, the Blue Dog Democrat posed a much greater obstacle to the creation of a congressional majority for a Green New Deal.[186] This shows that insurgents hold competing strategies for determining which Democratic incumbents they should challenge to effect maximal party change and some see them as mutually exclusive.

Finally, a significant number of insurgents, a total of 110, ran in open or Republican-held swing seats and Republican districts, a majority of whom ran in 2018. But not all districts that are not reliably Democratic are the same: there is more nuance and strategy behind these runs than first meets the eye. Forty-five percent of 2018 challengers in swing seats ran in districts that had voted for Hillary Clinton and a Republican congressman simultaneously in the 2016 election.[187] Due to their higher likelihood of flipping in the midterm election, these districts garnered national attention and elite Democrats, advocacy groups, and partisans channeled massive amounts of resources toward them. If the outcome of the 2016 general election put Democrats' focus on these districts, it was the close Democratic primaries and the battle over whether Clinton's centrism or Sanders's progressivism would more effectively mobilize and flip voters that the insurgents brought to the table. That is, insurgents were not randomly running in these swing seats: many

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[186] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.
[187] Data from the Cook Political Report.

were high-profile contests between these two factions of the Democratic Party over which respective policy agenda was more electorally successful against Republicans. Very few challengers in 2020 ran in these districts.[188]

The Dynamics Between Democrats and the Insurgents

> "There was a lot of pushback. It is not easy to be a challenger. A lot of folks told me I was betraying my party," Arati Kreibich, 2020 insurgent in NJ-09.[189]
>
> "I had a long history of organizing with the Democratic Party. I had a strong campaign with momentum and endorsements from organized labor. I was the best fundraiser in the whole primary if you don't count corporate money. But because I was progressive, which is what the Democratic Party claims to be, they did everything they could possibly do to stop my candidacy," Brent Welder, 2018 insurgent in KS-03.[190]
>
> "After Representative Ocasio-Cortez and the Squad got elected, it shook the Democratic establishment up. They didn't know what other way [besides the blacklist] to beat back people like me who decided that they were going to run," Kina Collins, 2020 insurgent in IL-07.[191]

The contentiousness of the relationship between the Progressive Insurgency and the Democratic Party varies considerably.[192] Figure 9 shows insurgents' reports of levels of party hostility clustered around higher levels, with 56% rating it as "4" or "5." Within the remaining 44%, 13% said "2," and 17% said "1"—that is, 30% in the lowest two levels. Thus, while nearly twice as many insurgents experienced high degrees of hostility from Democrats than low levels, it was far

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[188] Data from the Cook Political Report; N = 110.
[189] Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021.
[190] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[191] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[192] In the survey, I asked challengers, "how hostile was the Democratic Party to your candidacy?" where 1 was "not at all" and 5 was "very much so."

from a universal experience for challengers.[193]
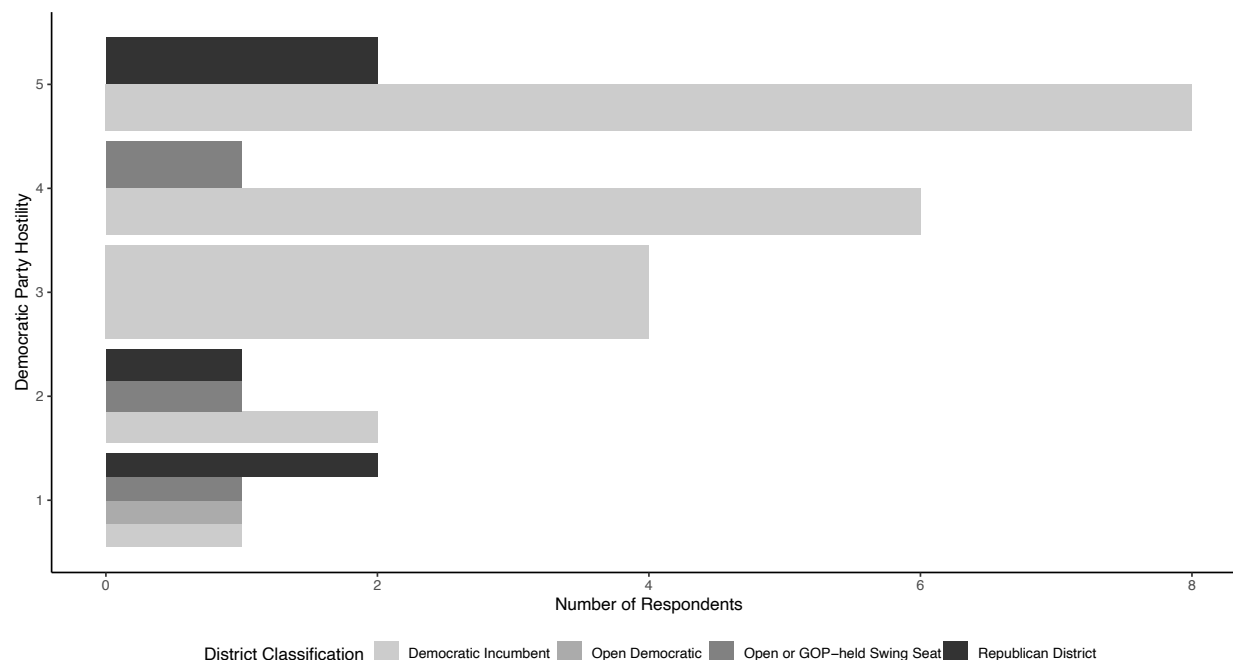
Figure 9: How hostile was the Democratic Party to your candidacy? (1 = not at all, 5 = very much so). Survey data. N = 28.

The degree of Democratic hostility that challengers experienced varied systematically based on the type of district that they ran in. Two-thirds of insurgents running against Democratic incumbents experienced high ("4" and "5") levels of hostility with only 14.2% reporting the lowest levels ("1" and "2"). This compares to 100% of challengers in Democratic open seats responding with "1," two-thirds of challengers in open or Republican-held swing seats reporting "1" or "2" with one-third reporting "4." Sixty percent of challengers in Republican districts said "1" or "2" while 40% said "5." These results show that the degree of Democratic hostility that insurgents experienced was correlated with how direct their institutional challenge of the party was. It makes sense that challengers experienced the most hostility when they primaried an incumbent and the least when they ran in districts that not only did not have a Democratic incumbent but a weak party

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[193] Survey data; N = 28.

to push back against their bid.

As with party hostility, Democrats' pushback to progressive insurgents' candidacies largely depended on the district they ran in.[194] While a few candidates running against Democratic incumbents received various forms of support from local party members or clubs, most experienced a combination of being ignored, having local party operatives allied with the incumbent influence the publicity they got in local media and party clubs, being prevented from accessing vital campaign infrastructure, and being the target of character assassinations. Several such insurgents were ignored or "ghosted" by local operatives even if they came within points of defeating the incumbent. The most common form of pushback was incumbent and local party attempts to control the publicity challengers received, either through using their connections to local media to influence coverage or through dissuading local Democratic clubs to invite them to make their case.[195] As one said, "The party actively participated behind the scenes to aid and assist the incumbent, while influencing coverage of our efforts."[196]

The Democratic Party's greatest retaliatory response was the Democratic Congressional Campaign Committee's (DCCC's) post-2018 blacklist of firms that worked with primary challengers—an example of the party as an "incumbent protection system" in action.[197] As I discuss further in Chapter 4, the DCCC's blacklist was an attempt to limit the viability of insurgents' campaigns against Democratic incumbents. The substance of the policy, which the party implemented and then rescinded at opposite ends of the 2020 electoral cycle, was not new

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[194] For more a detailed picture, I asked challengers in their interviews to describe what pushback, if any, they received from the Democratic Party.

[195] Brian F. Schaffner, "Local News Coverage and the Incumbency Advantage in the U.S. House," *Legislative Studies Quarterly* 31, no. 4 (2006): 491–511.

[196] Progressive insurgent interviews; Survey data.

[197] Hans J. G. Hassell, *The Party's Primary* (New York: Cambridge University Press, 2018); Amy Pritchard, "Opinion | A Policy to Quash the Women's Wave. From Democrats," *The New York Times*, December 9, 2019, sec. Opinion, https://www.nytimes.com/2019/12/09/opinion/house-democrats.html.

but rather codified existing norms.[198] Indeed, auguring the subsequent formal blacklist, in 2018 the Michigan Democratic Party cut off all Justice Democrats-endorsed candidates' access to the Voter Access Network (VAN), which campaigns use to track voter contact, once the insurgent organization endorsed a dynamic gubernatorial candidate.[199] Other candidates in 2018 confirmed that their state parties had a great amount of leeway in determining which candidates had access to VAN.[200] As Kina Collins, a 2020 challenger in IL-07, explained, "The DCCC rule always existed, it's just that they put it on the books [in 2020]. Then they got so much backlash that they repealed it."[201]

The DCCC blacklist affected many arenas of insurgent campaigns, from access to basic goods like voter data to which staffers were willing to work on their campaigns. As intended, it had detrimental effects on insurgents running against incumbents in 2020, some of which were immediate. Some challengers were already working with firms when the DCCC issued the edict, which prompted them to back out of the challengers' campaigns.[202] The rules change limited not only challengers' access to software like VAN that is under the exclusive control of the Democratic National Committee (DNC). It also reduced insurgents' access to campaign infrastructure and necessities that come through private firms, through the threat of being blacklisted by the national party organization if they worked with insurgents.[203] Specifically, this influenced what staff, general consulting or specialist (such as accounting) firms, and voter databases insurgents could

[198] Pritchard, "Opinion | A Policy to Quash the Women's Wave. From Democrats."; Ally Mutnick, "House Democrats End Controversial Consultant Ban," *Politico*, March 9, 2021, https://www.politico.com/news/2021/03/09/dccc-ban-primary-challengers-474588.

[199] David Benac, interviewed by Amelia Malpas, September 16, 2021.

[200] Kina Collins, interviewed by Amelia Malpas, September 23, 2021; Jason Call, interviewed by Amelia Malpas, August 10, 2021.

[201] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.

[202] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.

[203] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021; Albert Lee, interviewed by Amelia Malpas, August 25, 2021; Jason Call, interviewed by Amelia Malpas, August 10, 2021; Pritchard, "Opinion | A Policy to Quash the Women's Wave. From Democrats."

use. This forced insurgents primarying Democrats to rely on alternative sources of data, which were often more expensive than the mainstream equivalent.[204] The DCCC blacklist remains the party establishment's most extreme response to insurgent electoral success against Democratic incumbents, suggesting these are the insurgents who the party is most threatened by.

More informally but perhaps more insidious, local Democratic officials told insurgents primarying Democratic incumbents to "wait their turn," with all its racialized and gendered connotations. For example, Arati Kreibich was told that her challenge to a Blue Dog Democrat was a "betray[al to] the Democratic Party" that would "set the women's movement back X amount of years." She explained, "it's about gatekeeping and power and how people use their power."[205] Some of Democrats' attacks on insurgents' candidacies were indirectly racial or directly racist. Saira Rao, a 2018 challenger in CO-01, said, "I have degrees from the fanciest schools in the country … I'm privileged. I'm pedigreed. I have all of it. And I cannot tell you how many people would say to me, you're not qualified. I lacked one qualification. That was skin color. Gender was awash because [the incumbent] is a woman as well."[206] Running for office made her realize how racist the country could be beyond anything she had done before, an experience that several other insurgents shared.

The level of pushback that progressive insurgents who primaried Democratic incumbents experienced contrasts starkly with that of insurgents in open Democratic districts. For instance, Beth Doglio, a 2020 challenger in WA-10, "had support from the Democratic Party, from all of the local county parties and organizations."[207] During the primary campaign, she received support from elected insurgents as well as many members of the Progressive Caucus since her candidacy

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[204] Progressive insurgent interviews.
[205] Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021.
[206] Saira Rao, interviewed by Amelia Malpas, September 16, 2021.
[207] Beth Doglio, interviewed by Amelia Malpas, August 19, 2021.

did not directly threaten the reelection of another Democrat.

With the exception of those who challenged Democratic incumbents, insurgents running in open or Republican-held swing seats experienced the most extreme pushback. This is likely because these seats are potentially winnable by Democrats, so party officials perceive the quality and ideological image of the general election candidate to be highly important.[208] Local parties, and in a few cases the DCCC, directly mobilized against several of these progressive insurgents, even if they had all the other qualifications that the DCCC looks for in candidates. Laura Moser, whose 2018 campaign in TX-07 gained national attention because of the intensity of the DCCC's rebuke of and spending efforts against her, said, "The establishment Democratic Party hates Bernie Sanders people more than they hate Trump, because at least Trump gives them a cause."[209]

Some of the pushback was quieter, like rumors that DCCC operatives told firms not to work with the particular candidate. Another candidate recounted multilayered dynamics: days before the primary election, the DCCC issued a press release that "tacitly endorsed" all the candidates in the race, which the insurgent saw as a real victory and a rarity when there is a progressive insurgent in an election. Behind the scenes, however, it was not so neutral as "they also had their money people funneling a million dollars—literally a million dollars of dark money—into my main opponent's campaign."[210] The only instance of party-wide embrace was with Randy Bryce, who ran in and won the Democratic primary in WI-01 when it was then-Speaker of the House Paul Ryan's district. Bryce was a very strong candidate, especially with fundraising which helped him win the support of the DCCC, but this unusual support likely stemmed from the symbolic value of Ryan as a target for Democrats. Indeed, after Bryce lost the general election, he

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[208] Hirano and Snyder, *Primary Elections in the United States*.
[209] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.
[210] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.

started a political action committee called IronPAC to get more working-class progressives into Congress from Republican and swing districts. This earned him a personal call of consternation from a Pelosi staffer when Pelosi had approved of his previous political efforts.[211]

Insurgents in safe Republican districts tended to have the least interaction with Democratic officials, and even when they did, they received considerably less pushback. One challenger described their positive experience: "Unlike many other progressive candidates, we were not challenging a sitting Democratic member of Congress so the party was happy we were running."[212] While a few candidates still experienced pushback or were ignored by the state party after they won their primary election, most of these candidates did not receive pushback at all but rather support from a broad array of national party elites, in one case, everyone from Senator Elizabeth Warren to then-Democratic presidential candidate Joe Biden.

A few strong candidates in these districts even received—or were offered but declined—a position on the DCCC's "red to blue" list of seats they think have a high potential of flipping in the general election. One declined because of the stipulations and because the DCCC "wanted their hands on every part of our campaign."[213] Julie Oliver who ran in TX-25 both years and received the offer in 2020 accepted and actively resisted pressure to restructure her campaign around the DCCC's demands. This was not without tension, as the insurgent and DCCC clashed over who the important campaign personnel were and competing visions of how to run campaigns. Oliver found that the DCCC was only interested in her campaign's pollsters, advertisement people, and literature firm—not the campaign's field director or campaign manager, whom Oliver saw as much more important to her campaign.[214] The DCCC also tried to get Oliver to talk about "access to affordable

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[211] Randy Bryce, interviewed by Amelia Malpas, September 13, 2021.
[212] Nick Rubando, interviewed by Amelia Malpas, August 30, 2021.
[213] JD Scholten, interviewed by Amelia Malpas, September 13, 2021.
[214] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.

health care" rather than Medicare for All, which she withstood. Oliver accepted the DCCC's support because being on their red to blue list gave her access to an entire arena of Democratic donors who are committed to the party (rather than the decidedly smaller pool of those committed to the insurgency) heading into the general election.[215]

Despite the pushback and hostility that insurgents experienced, only 17% reported having incumbent- or party-related issues getting on the ballot.[216] This is notable simply because it shows that challengers overwhelmingly were not obstructed from getting their names on the ballot by any Democrats.[217] The Democratic obstruction came from different sources within the party for the few who reported it. The incumbent challenged one insurgent's access to the ballot while the township clerk, who was also the chair of the local Democratic Party, misspelled another's name on the ballot, fitting in with a broader pattern of "errors with the names of progressive candidates that occur regularly in his office."[218] The biggest structural obstacle was in New Jersey—all New Jersey insurgents experienced party-related ballot issues—which has a distinct ballot structure that disadvantages challengers. According to Hector Oseguera, a 2020 insurgent in NJ-08, the party "prevented progressive challengers from 'bracketing' with Sanders [while] allowing the machine to 'bracket' with Biden."[219]

While nearly two-thirds of insurgents were not pressured to drop out of their race by

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[215] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021; Hassell, *The Party's Primary*; Jacobson and Carson, *The Politics of Congressional Elections*.

[216] I also asked the insurgents if they had "incumbent- or Democratic Party-related difficulties getting on the ballot."

[217] Survey data; N = 30.

[218] Survey data.

[219] Hector Oseguera, interviewed by Amelia Malpas, July 8, 2021; Julia Sass Rubin, "Does the County Line Matter? An Analysis of New Jersey's 2020 Primary Election Results," *New Jersey Policy Perspective*, August 13, 2020, https://www.njpp.org/publications/report/does-the-county-line-matter-an-analysis-of-new-jerseys-2020-primary-election-results/. Studies show that the placement of candidates' names on the New Jersey ballots has a large impact on their vote share.

Democratic officials, 20% were "implicitly" and 17% were "explicitly" asked to do so.[220] Local

party operatives, representatives of local Democratic clubs, and elected state and local Democrats

were the primary fonts of pressure.[221] As with degrees of Democratic hostility, the district

challengers ran in was influential. No challengers in open Democratic or open or Republican-held

swing seats were pressured to drop out nor were 80% of those in Republican districts (the

remaining 20% were implicitly). In contrast, only 52% of insurgents primarying Democratic

incumbents reported no pressure to drop out; 29% of such candidates were explicitly asked to drop

out and 19% were implicitly. Relative to campaigns for other federal offices, House races have

fewer voters and therefore require fewer resources, which can insulate candidates from party

pressures to drop out. Insurgents were also insulated from these pressures by their lack of interest

in having careers within the Democratic Party.[222] While a majority of insurgents across all districts,

even those challenging Democratic incumbents, were not asked or encouraged to drop out, there

were appreciable differences depending on the directness of their institutional challenge to the

Democratic Party.[223]

Media, Social Media, and Running for a Specific Seat in an Era of Nationalized Politics

> "Every race is a national race, for better or for worse," Mel Gagarin,
> 2020 insurgent in NY-06.[224]

> "Most of us were trying to fundraise nationally so that we can gain
> legitimacy locally. We understood that all the hype we're getting on
> social media does not necessarily convert to votes. And so the hope
> and the aspiration that most of us had was that we would be able to
> secure the funds necessary to actually make a legitimate run in our

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[220] Finally, in the survey, I inquired as to whether candidates were "asked or encouraged to drop out of their race by officials in the Democratic Party." They could respond with "no," "yes, implicitly," or "yes, explicitly."
[221] Survey data.
[222] Hassell, *The Party's Primary*.
[223] Survey data; N = 30.
[224] Mel Gagarin, interviewed by Amelia Malpas, September 17, 2021.

> local districts," Albert Lee, 2020 insurgent in OR-03.[225]
>
> "I could never figure out how to translate a national profile into a local profile," Brianna Wu, 2018 insurgent in MA-08.[226]
>
> "We had good luck with the press. Although when you're progressive, the press is always skeptical. You have to make the case way better than anyone else. They just don't understand arguments that are outside of the mainstream press releases from the Democratic Party and the Republican Party," Brent Welder, 2018 insurgent in KS-03.[227]
>
> "The media was not on our side," Kina Collins, 2020 insurgent in IL-07.[228]

Traditional media, and increasingly social media, provide oxygen for campaigns, as they inform the public about their political choices and characterize candidates' relative ideological positioning. For example, 57% of progressive insurgents reported being compared to Alexandria Ocasio-Cortez in the media, indicating that media portrayed them as being politically or dispositionally similar to the face of the movement.[229] Broadly struggling to gain traditional media coverage, progressive insurgents relied heavily social media to raise their profiles. After nearly a year of campaigning with minimal media exposure, candidate Ocasio-Cortez had moments of social media virality toward the end of her primary campaign. From this, she gained greater renown and donations nationally, a strategy that other progressive insurgents emulated.[230] Patrick Nelson, a challenger in NY-21 during the same year as Ocasio-Cortez, reflected that he was "chasing virality, trying to have moments that would get small dollar donor people to buy into the race and

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[225] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[226] Brianna Wu, interviewed by Amelia Malpas, August 9, 2021.
[227] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[228] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[229] Ocasio-Cortez's successful insurgent challenge was a pivotal moment for the Progressive Insurgency, making her name shorthand for the insurgency's primary election tactics. I therefore asked challengers if the media "compared your candidacy and purpose of your campaign to Alexandria Ocasio-Cortez's?" Survey data; N = 30.
[230] Lears, *Knock Down the House*; Grim, *We've Got People*.

get that sort of Randy Bryce [a 2018 insurgent in Wisconsin] type attention or when AOC had her ad that went viral. We were chasing that moment. We lost because we never had it."[231]

Indeed, social media—read: Twitter—was a critical part of progressive insurgents' strategy to build a national base of would-be donors and volunteers.[232] Social media was many challengers' greatest fundraising tool. One challenger raised nearly $100,000 from a Twitter thread that went viral.[233] As progressive insurgents tried to follow Sanders's small-dollar, digital fundraising model (the difficulties of which I elaborate on in Chapter 3), building and tapping into the nationwide, online progressive base was essential for it to be a viable strategy.[234] Challengers' use of and reliance on social media was heightened after March 2020, when, due to the pandemic, some hosted virtual town halls together regardless of their districts' geographical proximity. But, as many insurgents with tens of thousands of followers found, there is a big difference between gaining a national political following and successfully organizing voters in the district that they were running in. Such is the tension between running for a geographically-delineated seat as part of an insurgency during an era of nationalized politics.

Traditional media coverage of insurgents at the national and local level also reflects this tension. In essence, the publicity from national media—along with social media and endorsements from core insurgent organizations—helped them build a national base of supporters. But these supporters were dispersed across the nation: they were not potential voters. Local media coverage,

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[231] Patrick Nelson, interviewed by Amelia Malpas, August 17, 2021.

[232] Diana Owen, "New Media and Political Campaigns," in *The Oxford Handbook of Political Communication*, ed. Kate Kenski and Kathleen Hall Jamieson (New York: Oxford University Press, 2017), 823–36; Maria Petrova, Ananya Sen, and Pinar Yildirim, "Social Media and Political Contributions: The Impact of New Technology on Political Competition," *Management Science* 67, no. 5 (2021): 2997–3021; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*. This parallels Tea Party members of Congress's use of Twitter to cultivate a national constituency despite the fact that their voters were geographically delineated in a particular congressional district.

[233] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.

[234] Progressive insurgent interviews; Boatright, *Getting Primaried*.

in contrast, is important for informing a district's politically-engaged residents about the candidates they can choose from in the primary election.
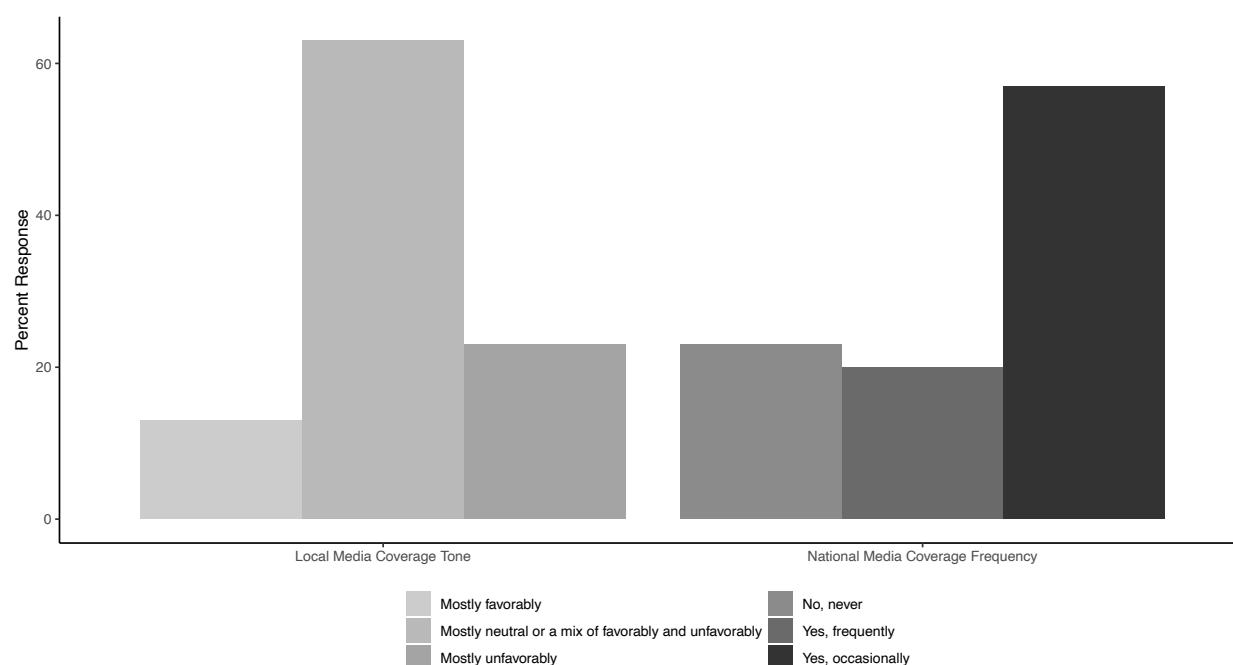
Figure 10: Rate how favorably local media covered your campaign & was your campaign covered in the national media? Survey data. N = 30.

The frequency and tone of coverage in local and national media was a critical component of insurgents' campaigns.[235] Figure 10 shows challengers' experiences with local and national media coverage.[236] A supermajority, 63%, said local coverage was "mostly neutral or a mix of favorably and unfavorably," with 23% reporting "mostly unfavorably" and only 13% reporting "mostly favorably."[237] Quite a few never received major local coverage, including one insurgent who received 47% of the vote against the Democratic incumbent in the general election. Several

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[235] Matthias A. Gerth, Urs Dahinden, and Gabriele Siegert, "Coverage of the Campaigns in the Media," in *Political Communication in Direct Democratic Campaigns: Enlightening or Manipulating?*, ed. Hanspeter Kriesi (London: Palgrave Macmillan UK, 2011), 108–24.

[236] First, I asked them to "rate how favorably local media covered your campaign" where the preselected answers were "mostly favorably," "mostly neutral or a mix of favorably and unfavorably," and "mostly unfavorably." It was an oversight of mine not to survey challengers directly about how often their campaign was covered by the local media. This, it turned out, was a major issue for insurgents.

[237] Survey data; N = 30.

perceived the local media as serving as a de facto incumbent-protection machine, which was more likely to cover local party smears and character assassinations of the insurgent than anything else about their campaign. Tahirah Amatul Wadud, a 2018 insurgent in MA-01, said that the local press "would write about everything, but they wouldn't write about my policies. They wouldn't write critically about [incumbent] Neil."[238]

Broadly, challengers found that local media coverage, important for reaching potential voters, strongly favored the incumbent, which research confirms.[239] House races tend to be much lower information for voters than those for the presidency or Senate, so there is generally less media coverage for all such candidates.[240] But the quality of the coverage candidates receive and if they are promoted or framed as the "inevitable" nominee by the media have a lot to do with candidates' level of party support.[241] The few progressive insurgents who did receive local media publicity discussed having prior connections to local journalists.[242] Only 23% of challengers were endorsed by a local paper, an asset for primary candidates, and they were usually alt-weeklies.[243] Robert Emmons Jr., a 2020 challenger in IL-01, earned the endorsement of the *Chicago Tribune*— exceptional approval from his major mainstream local paper.[244]

As Figure 10 also shows, over half of insurgents (57%) received national media coverage occasionally. The remainder split nearly evenly: 23% never did and 20% did frequently.[245] In total, 77% of progressive insurgents received some kind of national media attention. While insurgents

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[238] Tahirah Amatul Wadud, interviewed by Amelia Malpas, September 23, 2021.
[239] Schaffner, "Local News Coverage and the Incumbency Advantage in the U.S. House."
[240] Hassell, *The Party's Primary*; Gerth, Dahinden, and Siegert, "Coverage of the Campaigns in the Media."
[241] Hassell, *The Party's Primary*.
[242] Progressive insurgent interviews.
[243] In another question, I asked challengers if they were endorsed by a local paper. Survey data; N = 30. Hirano and Snyder, *Primary Elections in the United States*.
[244] Progressive insurgent interviews.
[245] My second question with results displayed in Figure 10 was whether "your campaign [was] covered in the national media?" where insurgents could respond with "no, never," "yes, occasionally," or "yes, frequently." Survey data; N = 30.

overall struggled to attract mainstream media attention, those that did tended to receive more coverage in the national than local media. Brianna Wu, a 2018 challenger in MA-08, who gained prominence in the Gamergate scandal, used this profile to gain coverage of her campaign in the *New York Times.* A few women of color who ran in 2018 received coverage because they fit an existing media interest in women and people of color running for office following Trump's election—they did not earn the coverage *because* they were progressive insurgents. Fayrouz Saad, a 2018 candidate in MI-11, explained, "I was the first Arab American Muslim woman to announce [my candidacy] and so for the first six months, that was the story. It wasn't until months later that Rashida [Tlaib] announced, and then Ilhan [Omar] announced. That is why I think I got a lot of attention, because I had this profile in real life after Trump's election."[246] She also credited the national media coverage of her campaign to how hard she worked to cultivate relationships with journalists.

Candidates who did receive mainstream coverage cited a particular media moment that raised their campaign's profile. Two challengers either went on or were discussed on Fox News, which, perversely, had the effect of drawing more left attention to them. Lauren Ashcraft, a 2020 challenger in NY-12, said some "inflammatory things about the police" after George Floyd's murder in an email to supporters, which became the topic of a Fox article. While that publicity earned her "a bunch of threats," it also brought her campaign to the attention of new supporters.[247] For Sarah Smith, going onto Fox to talk about policy—Medicare for All, how to pay for it, and how it would reduce the US' annual health care spending—earned her a surprising increase in support. Liuba Grechen Shirley, a 2018 candidate in NY-02, had a very different experience. She filed a request with the Federal Election Commission (FEC) to be able to use her campaign funds

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[246] Fayrouz Saad, interviewed by Amelia Malpas, September 29, 2021.
[247] Lauren Ashcraft, interviewed by Amelia Malpas, September 17, 2021.

for childcare for her young children. "Everybody told me it was political suicide. They said, 'you can't do this, you're going to be attacked as a woman, you're going to be attacked as crazy.' But I didn't have a choice. I gave up a salary [to run]."[248] *Glamour Magazine* covered it first, which prompted a media cascade of coverage in national outlets, drawing attention to and support for her campaign. It did not hurt that she was running in an election year with a record number of women candidates in response to the president's proud misogyny and election over Hillary Clinton.[249]

Alternatively, some progressive insurgents—especially in Republican districts—benefitted greatly from national press coverage of their district's incumbent behavior, which prompted people in and out of the district to research who was challenging them. Adam Christensen, a 2020 challenger in FL-03, explained, "the biggest reason that we got on the map was because [incumbent] Ted Yoho decided to call AOC an effing bitch on the Capitol steps."[250] Republican Representative Roger Williams was with Yoho: Julie Oliver was running against Williams and experienced a similar surge in support and donations following the altercation.[251] In 2018, Randy Bryce ran against then-Speaker of the House Paul Ryan in WI-01 and JD Scholten against Representative Steve King in IA-04, an avowed white nationalist in the Republican Party when that was more controversial than it is currently; both credited the infamy of their Republican opponents as being instrumental in their fundraising and general success. Scholten said, "we ran against Steve King, which was our best fundraiser."[252] Similarly, when Pelosi, whom Shahid Buttar challenged in both years in CA-12, voted to fund Trump's border policies and other actions that drew the ire of the left, his campaign earned new support.[253]

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[248] Liuba Grechen Shirley, interviewed by Amelia Malpas, September 1, 2021.
[249] Ibid.
[250] Adam Christensen, interviewed by Amelia Malpas, September 23, 2021.
[251] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.
[252] JD Scholten, interviewed by Amelia Malpas, September 13, 2021.
[253] Progressive insurgent interviews.

But this mainstream coverage in a national paper did not overcome the difficulty of receiving local paper coverage and building a local profile. Kina Collins, a 2020 and now 2022 insurgent in IL-07, explained, "I think that the national media has caught on a lot quicker because they've seen this play out before. They're like, 'we missed the mark with Cori Bush. We missed the mark with AOC. We missed the mark with Jamaal Bowman.' So the national media is catching on and they want the scoop on some of these challenges, especially if you get a Justice Democrats type endorsement."[254] While her Justice Democrats endorsement in the 2022 electoral cycle earned her a CNN story about her campaign launch, local media still shied away from covering her campaign.

If the mainstream national and local media were largely unreliable or absentee narrators for progressive insurgents' campaigns, independent left publications, podcasts, blogs, and YouTube channels gave them platforms and publicity—acting as extra-party insurgent infrastructure. In particular, candidates credited The Young Turks show as providing essential coverage, with their appearances leading to surges audience interest and support in their campaigns.[255] Roza Calderón, a 2018 insurgent in CA-04, credited the show with connecting "progressive supporters who wanted to see a hostile takeover, you could say, of the Democratic Party" to her campaign.[256] Showing the influence of left independent media, Hector Oseguera, a 2020 challenger in NJ-08, credited an *Intercept* article on the major New Jersey insurgents as a "turning point" in his campaign.[257] Its publication resulted not only in an "influx" of new supporters on his social media pages, but also in donations. One challenger, who had a legion of volunteers dedicated to press outreach and emulating the "K-Hive"—Twitter users that famously

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[254] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[255] Progressive insurgent interviews.
[256] Roza Calderón, interviewed by Amelia Malpas, August 20, 2021.
[257] Hector Oseguera, interviewed by Amelia Malpas, July 8, 2021.

bombard accounts critical of Vice President Kamala Harris—recalled that "the left podcaster ecosystem was freakishly lucrative to us."[258] Challengers' media observations roughly parallel Sanders's own from his 2016 election, where he credits independent media like The Young Turks as instrumental and faults the corporate media for treating politics as entertainment rather than about power and shaping the salience of political issues away from material realities.[259]

Insurgent Campaigns and Electoral Strategies

Campaign Staff

> "The good thing about the national attention was that it brought excitement and enthusiasm. With excitement and enthusiasm came volunteers," Tahirah Amatul Wadud, 2018 insurgent in MA-01.[260]

> "My staff was around 200 college and high school students in a Slack," Hector Oseguera, 2020 insurgent in NJ-08.[261]

> "The campaign was chaos because it was entirely run by volunteers. Nobody was a professional, which was good and bad," David Benac, 2018 insurgent in MI-06.[262]

> "As an activist, as a regular person, I had zero idea how to run a campaign beyond filing to run," Roza Calderón, 2018 insurgent in CA-04.[263]

Staff are an essential part of a successful political campaign. But building a team of professional, experienced, paid staffers proved a very difficult task for most progressive insurgents who ran with limited resources and little to no party support.[264] A few challengers, all but one in swing or

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[258] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[259] Bernie Sanders, interviewed by Amelia Malpas, April 4, 2022; Sanders, *Our Revolution*.
[260] Tahirah Amatul Wadud, interviewed by Amelia Malpas, September 23, 2021.
[261] Hector Oseguera, interviewed by Amelia Malpas, July 8, 2021.
[262] David Benac, interviewed by Amelia Malpas, September 16, 2021.
[263] Roza Calderón, interviewed by Amelia Malpas, August 20, 2021.
[264] Hassell, *The Party's Primary*; Jacobson and Carson, *The Politics of Congressional Elections*.

Republican districts, raised enough money and had enough Democratic Party support to have professional, well-run campaigns. The most notable exception to the norm was with Robert Emmons Jr.'s campaign in IL-01 in 2020 against a Democratic incumbent, where one of his advisors was a veteran of Chicago politics who had formerly worked for Mayor Harold Washington and the Obamas (he also has the distinction of receiving the endorsement of the *Chicago Tribune*).[265] With these few exceptions, insurgents' staff was inexperienced, unpaid, and young or made up of personal friends or family members—hardly conducive to electoral success. The composition of their staff varied greatly over the duration of their campaigns: the number of people on staff and how many were paid was far from static.

Ultimately, many insurgents' campaigns ended up being poorly run, for which some took responsibility and some did not. Mark Gamba, a 2020 challenger in OR-05, "did not have professional staff which badly affected [his] fundraising. It stymied the whole process getting a website up and organizing volunteers."[266] Only the campaign manager had prior campaign experience on Rachel Ventura's campaign. While some like Gamba and Ventura tried to, others intentionally did not want to run conventional campaign. One challenger tried to run their campaign "like a startup," which they had regrets about, while another had problems with "trying to run an out-of-the-box campaign with in-the-box people."[267] Agatha Bacelar, a 2020 insurgent in CA-12, was blunt that she thought she "didn't necessarily need the traditional people who have worked on campaigns before. That was a big mistake, because what I learned later is that almost every successful progressive campaign in San Francisco is run by the same people."[268] A few

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[265] Progressive insurgent interviews.
[266] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.
[267] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021; Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[268] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021.

insurgents were worried that they would be sabotaged by staffers who were actually answering to the incumbent.

Insurgents' staff tended to be quite young, even in relation to the fact that campaigns are often staffed with young people, and comprised of friends and family members. Several relied on friends to be their campaign managers or accountants, but even more had family members, in particular partners, serving in key campaign roles like these. Some campaigns were predominantly made up of both friends and family. For others, these people had outsized roles in the early stages of the campaign, but they brought on new staff as it progressed. One insurgent who was a law student at the time had a staff made up of other law students. Another challenger said, "I'm 33 and I was the oldest person on the campaign."[269] Even more stark, Shaniyat Chowdhury, a 2020 insurgent in NY-05, said that "the average age of our campaign was 22 years old."[270]

Since "young people tend to be exploited by campaigns for volunteer hours or paper wages," Chowdhury made sure to fairly compensate them by "making sure they had a place to stay or making sure they were being paid properly."[271] Randy Bryce, a 2018 insurgent in WI-01, not only paid staff but said they "were the first [campaign] to unionize in American history."[272] Nick Rubando, a 2020 insurgent in OH-05, also paid his staff, which was a priority of his. He explained, "Luckily, we were in a spot where we could where we could pay people. I thought it was really important to ensure that we were paying our staff. I've worked on campaigns where I haven't gotten paid. If we're going to preach the dignity of work and ensuring that people are paid for their labor, I feel like that should start with our campaigns."[273]

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[269] Adam Christensen, interviewed by Amelia Malpas, September 23, 2021.
[270] Shaniyat Chowdhury, interviewed by Amelia Malpas, August 24, 2021.
[271] Ibid.
[272] Survey data.
[273] Nick Rubando, interviewed by Amelia Malpas, August 30, 2021.

Rubando's observation gets at the core labor tension of most progressive insurgents' campaigns. Insurgents paying all their staff salaries or even hourly wages was extremely rare, and even compensating some of them materially in any amount was uncommon. Most candidates never paid more than a few members of their staff. One challenger had a "couple paid staff" and a few paid interns. Another two paid only their successive campaign managers; everyone else was a volunteer. Yet another gave stipends to the volunteer treasurer, policy advisor, and field director. A few brought on temporary (paid) consultants for compliance with Federal Election Commission filings or communications, but they were contractors for specific tasks rather than full-time staffers. Consultants were expensive for the cash-strapped campaigns.[274] As such, many campaigns had entirely volunteer staff. They had, in their words, "99 percent volunteer staff" or "100 percent volunteers."[275] One challenger gave a frank admission of their use of volunteer staff to mimic a professional staff without the cost, saying that "if more leftists and progressives want to get in, you really need to build up a very dedicated team from the grassroots that are willing to put that kind of work in and also learn the things that the high price people would be doing."[276] A different insurgent's campaign whose staff was also entirely volunteer was roiled over disagreements between the candidate and some of the staff about payment, a scenario that most other volunteer campaigns seemed to avoid.

Progressive insurgents' pro-labor platforms coupled with their reliance on largely unpaid staffers was a central hypocrisy within their movement. And unfortunately, the Progressive Insurgency also inherited parts of this dynamic from the Sanders's campaign. Becky Bond and Zack Exley, two field directors and senior advisors to Sanders's campaign wrote in *Rules for*

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[274] Progressive insurgent interviews.
[275] Ibid.
[276] Liam O'Mara, interviewed by Amelia Malpas, August 3, 2021.

Revolutionaries: How Big Organizing Can Change Everything that Sanders's movement and mass organizing were based on volunteers rather than movement "mercenaries," that is, paid organizers.[277] They strove to delegate work and build support for the campaign through a web of committed volunteer organizers, with a sparse sprinkling of paid organizers. But the ideal of civic engagement and movement-building without emolument makes fully engaging in this work prohibitive to the very people who are supposed to be at the center of the movement.

These issues in staffing come from two primary sources: first, most insurgents' lack of financial resources with which to pay staff, which other challenger campaigns suffer from, and second, that there simply is a scarcity of progressive staffers who have experience on well-run, successful, professional campaigns.[278] Insurgents did not primarily exploit their staff for the sheer pleasure of it; as many explained, if they had had the resources, they would have paid people to work for them. This logical cause of labor exploitation, however, does not negate the tension between a movement committed to economic justice and workers' rights where many candidates do not fairly compensate their campaign workers. Beyond this, challengers found that with so many of them running at once—not to mention progressive insurgents running for other levels of government—they were competing for infrastructure and, for those which were paying employees, the same top professional staff. After Sanders terminated his 2020 presidential bid, a few got more local staff who had previously been affiliated with his campaign. There was no pipeline of professional, progressive staffers on the scale required by the insurgency.[279]

Insurgent Strategy

"Our campaign was most proud of the investment we made in field.

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[277] Bond and Exley, *Rules for Revolutionaries*.
[278] Jacobson and Carson, *The Politics of Congressional Elections*.
[279] Progressive insurgent interviews.

We wanted to have a grassroots operation and show people what it looks like to build a movement," Morgan Harper, 2020 insurgent in OH-03.[280]

"I garnered almost 20,000 votes in 2020 with virtually no money and basically no software," Kina Collins, 2020 insurgent in IL-07.[281]

"Every morning at 6 am we were at the bus stops and the BART stations. We knocked on thousands of doors. Like AOC, I wore out my shoes. I had bloody fingers from all the literature, cardboard cuts and everything. I would walk 10 miles a day and I lost so many pounds, my parents were like, 'are you okay?'" Ryan Khojasteh, 2018 insurgent in CA-12.[282]

"We were flying by the seat of our pants," Patrick Nelson, 2018 insurgent in NY-21.[283]

Progressive insurgents pursued campaign strategies that were financial resource low and human energy resource high. As such, a majority focused on field operations, understanding organizing and mobilizing their district to be necessary for their victory. One challenger put it succinctly, "You need a good ground campaign to be competitive or to win."[284] Insurgents stressed that the importance of a digital presence paled in comparison to having a strong ground game and physically organizing the district. Many candidates thought that canvassing their district, which no candidate had done in years, would work in their favor. As Fayrouz Saad, a 2018 insurgent in MI-11, explained, "No one had a ground campaign like we did … We were knocking on doors, we were talking to voters, we were capturing data."[285] Another candidate in Michigan said their campaign continued knocking doors and "organizing everywhere in every part of the district" in the brutal winter; this determination and commitment won them some voters.[286] Other candidates

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[280] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.
[281] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[282] Ryan Khojasteh, interviewed by Amelia Malpas, September 18, 2021.
[283] Patrick Nelson, interviewed by Amelia Malpas, August 17, 2021.
[284] Fayrouz Saad, interviewed by Amelia Malpas, September 29, 2021.
[285] Ibid.
[286] David Benac, interviewed by Amelia Malpas, September 16, 2021.

reported similar dynamics. Liuba Grechen Shirley, a 2018 insurgent in NY-02, said, "We knocked on over 250,000 doors. Every time you knock on the door, somebody would be shocked. They would say, 'you're the first person to ever come to my door.' It was a grassroots movement."[287] Similarly, Ryan Khojasteh, a 2018 insurgent in CA-12, said that when he canvassed voters, they responded positively since "Nancy Pelosi had never knocked on their door."[288] Quite a few tried to target their canvassing to precincts in the district that they thought, based on demographics, would be more likely to vote for a progressive insurgent. Printing mailers and literature was more expensive than sending volunteers out to canvass, so some challengers sent mail only to the places in the district that they did not canvass.[289]

Insurgent campaigns' ground games varied depending on the geographical size of the district, its built environment, and, most critically, if it took place during the covid-19 pandemic. Obviously, larger rural districts that take hours to drive across are more difficult to thoroughly canvass than dense urban ones. But those can have other difficulties, Jen Perelman, a 2020 challenger in FL-23, explained, like "gated communities or high rises where you can't get in. When that's the case, you're basically 100% dependent on mailers and TV"—more expensive and less effective ways of informing voters about the campaign.[290] Unsurprisingly, the pandemic had a large negative impact on most challengers' field operations, as it limited their ability to canvass and meet voters. Many eschewed even masked in-person door-knocking, instead leaving literature on people's doorsteps without contact. This likely had a greater negative impact on the insurgents' campaigns than the incumbents', which are less reliant on field operations to win reelection.[291]

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[287] Liuba Grechen Shirley, interviewed by Amelia Malpas, September 1, 2021.
[288] Ryan Khojasteh, interviewed by Amelia Malpas, September 18, 2021.
[289] Progressive insurgent interviews.
[290] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[291] Progressive insurgent interviews.

Finally, candidates had different fundraising strategies. Brent Welder, a 2018 insurgent in KS-03, "didn't think there should be any money in politics" but "wasn't naive enough to think that it wouldn't affect [his] race." So, he said, "our strategy was to be among the top fundraisers among progressives nationwide in the very first quarter of our race, to help us break through with progressive organizations."[292] It largely worked. Others pursued a strategy of emphasizing their populist bona fides through their small dollar donations or that they took no corporate money, no maximum individual contributions, and no PAC contributions. JD Scholten, a 2018 and 2020 challenger in IA-04, discussed the importance of having separate fundraising messaging, which was often negative—running against Republican incumbent Steve King made that easy—and campaign messaging, which was positive.[293] Robert Emmons Jr., a 2020 insurgent in IL-01, found fear to be mobilizing for voters, too, saying that "fear's a lot of the message for winners. It's how candidates are able to convert a voter who's used to voting for somebody for decades to voting for you the first time."[294] In general, insurgents' campaigns were cash-strapped, field-heavy, and untraditional.

Conclusion

Drawing primarily on evidence from insurgent interviews and surveys, this chapter has examined the internal dynamics of the Progressive Insurgency. It argues that the Progressive Insurgency aims to take over and transform the Democratic Party but that this is not without tensions between insurgents and incumbents, insurgents' national following versus local voters, and their reliance on unpaid campaign staff. It finds that Bernie Sanders's failed 2016 presidential run catalyzed the

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[292] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[293] Progressive insurgent interviews.
[294] Robert Emmons Jr., interviewed by Amelia Malpas, July 29, 2021.

first wave of the insurgency in 2018, who, in turn, inspired others to run in 2020. Challengers ran on similar policies that they drew from shared sources, attempting to broaden the public's imagination of what is politically possible in the United States. The nature of their relationship to the Democratic Party, further, was largely dependent on the type of district that they ran in: those primarying Democratic incumbents faced the most pushback and hostility. Despite this, Democratic officials pressured few insurgents to drop out of their races. Insurgents' electoral strategies were shaped by their interaction with mainstream and left media and social media, their lack of resources to pay staff adequately and therefore recruit experienced staff, and their emphasis on their field games. The results of these efforts materialized in insurgents' primary election outcomes, the topic of the next chapter.

Chapter 3

How to Make the Impossible Possible:

Predictors of Insurgents' Primary Election Performance

Introduction

On June 26, 2018, Alexandria Ocasio-Cortez, a progressive insurgent candidate in New York's 14th congressional district, arrived late to her campaign's primary election watch party in the Bronx. When she entered the venue, running the last few steps after catching a glimpse of the flatscreen through the window, the results showed her with a commanding lead over the ten-term incumbent Democrat Joe Crowley. Crowley had largely ignored and dismissed her campaign. Ocasio-Cortez was shocked, given the long odds of her challenge. A reporter said to her, "When you said you were going to challenge Joe Crowley, people looked at you like you were crazy." Ocasio-Cortez affirmed, "They did. And maybe I was a little bit … but we meet a machine with a movement."[295]

In her victory speech that night, once she had conclusively won the primary, Ocasio-Cortez credited the room of volunteers and supporters with her victory, saying that their work "changed America tonight." She continued that her win was "the beginning" of their movement's success because "the message that we've sent the world tonight is that it's not okay to put donors before your community. The message that we sent tonight is that improved and expanded Medicare for All, health care for every single person in America is what we deserve as a nation." She concluded,

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[295] Lears, *Knock Down the House*; Carolyn Kormann, "Alexandria Ocasio-Cortez's Victory Party," *The New Yorker*, June 27, 2018, https://www.newyorker.com/news/dispatch/shock-and-elation-at-alexandria-ocasio-cortezs-victory-party.

"So not only do I need to get elected, but we've got a whole bunch more primaries to go … We've got Ayanna Pressley in Massachusetts, we've got Cori Bush in Missouri, we've got Chardo Richardson in Florida, we've got a whole bunch more races."[296]

But of these progressive insurgents, only Pressley went on to win her primary. This chapter investigates what determines insurgents' different levels of electoral success, picking up where Chapter 2 left off with insurgent strategy. It aims to answer the following questions: What districts are insurgents running in? How has this district strategy changed between 2018 and 2020, and how does it impact their rates of electoral success? What factors have the greatest impact on insurgents' electoral performance? How do insurgents benefit from insurgent organizations and what does their fundraising look like? How threatened are Democratic incumbents by insurgent primary challenges?

In this chapter, I argue that the type of district—based on how Democratic its electorate is and if the incumbent is a Democrat—that progressive insurgents run in greatly influences what factors have the greatest impact on their primary election performance. Insurgents' ability to access and accrue electoral resources and rates of primary election and general election victory accordingly vary by Democratic Party's electoral and institutional strength in the district. The party's strength negatively impacts insurgents' success if the election is or resources are subject to intraparty competition while it benefits them if they are between the Democratic and Republican parties.

Specifically, I find that the Progressive Insurgency has become more assertive and targeted significantly more Democratic incumbents between 2018 and 2020. Its rates of primary election success have accordingly decreased, as challengers' primary election chances are negatively

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[296] "'This Is the Beginning': Alexandria Ocasio-Cortez's Victory Speech," *The Guardian*, June 28, 2018, https://www.youtube.com/watch?v=lAb2QMw9h_w.

correlated with there being a Democratic incumbent and how Democratic the district is, in broad terms. The opposite is true for their general election chances. Eight percent of all progressive insurgents and 7.5% of insurgents who primary Democrats have won election to Congress.[297] The variables with the greatest impact on insurgents' primary election performance largely depend on the type of district but most significant variables concern the insurgent rather than the district or the incumbent. The greatest predictors of the success of candidates at the heart of the insurgency who primary sitting Democrats are their quality and level of support, measured by past electoral experience, endorsements, and fundraising; it also matters if there are multiple progressive insurgents in the same race. Half of challenged Democratic incumbents increased their fundraising by more than 20% from the prior primary, suggesting that they felt quite threatened by the insurgent challenger. Most incumbents completely ignored the challenger. Those who felt the most threatened, however, orchestrated smear campaigns against the challenger's character rather than dismiss their policy ideas.

The six core insurgent organizations aid insurgents with different electoral resources and their endorsees have starkly different rates of primary election victory. As with many other issues concerning the Progressive Insurgency, the type of district that insurgents run in impacts their average fundraising: challengers in open Democratic seats raise the highest average, which is over four times as much as the lowest average of challengers to Democratic incumbents. The latter, however, raise the most money from within their districts. Many insurgents do not accept PAC money, instead emulating Bernie Sanders's small-dollar digital donation strategy—which only

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[297] While this is low, Boatright, *Getting Primaried* contends that the rate of incumbent loss to primary challengers is so low that the data are not recorded, Hirano and Snyder, *Primary Elections in the United States* write that incumbents lost primary elections at a rate of 1.6% between 2010-2016, twice as high a rate as in the 1990s, but still very low, and Jacobson and Carson, *The Politics of Congressional Elections* assert that between 1946-2014, only 1.6% of incumbents lost primaries.

works in practice for a handful of candidates with national renown.

These findings on the factors that impact challengers' primary election performance fit broadly with existing research, with the exception of candidate fundraising as a main predictor of challengers' primary vote share.[298] This chapter's findings also correspond with scholars' assertions that political advocacy groups' greatest support for endorsed candidates is their symbolic approval rather than direct financial contributions (which are legally limited).[299] In contrast, progressive insurgents' difficulty with earning the support of labor unions contradicts past findings on union support for primary challengers.[300]

This chapter unfolds as follows. After I describe my methods, I examine which districts progressive insurgents run in, how these patterns changed between 2018 and 2020, and how the type of district impacts their primary and general election success. Next, I explore which factors are the greatest determinants of insurgents' primary vote share, elaborating on insurgent organizations, challenger fundraising, and conditions outside of their control, like covid-19. Finally, I investigate insurgents' understandings of their primary vote performance and how threatened Democratic incumbents were by insurgent challenges.

Methods

As with Chapter 2, this chapter's findings rely on my insurgent interviews and surveys. They are also based on data on challengers' and incumbents' campaign finances from the Federal Election Commission, on their electoral performance from Ballotpedia, and other election-relevant raw data from similar sources. My methods of analysis are the same as the last chapter's: I employed

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[298] Hassell, *The Party's Primary*; Jacobson and Carson, *The Politics of Congressional Elections*.
[299] Boatright, *Getting Primaried*.
[300] Ibid.

qualitative coding and close-reading of interview content and made use of descriptive statistics on quantitative data.

I also conducted a series of robust OLS multiple regression analyses to determine what factors have the greatest influence on progressive insurgents' primary election performance. The independent variables I test and control for concern either the insurgent, the district, or the Democratic incumbent. (See Appendix C for a list of independent variables and how I operationalized them.)

Progressive Insurgents' Electoral Performance

Primary Elections

Across years and types of districts, progressive insurgents' median primary vote share was 23.5%.[301] Twenty-eight total challengers earned between 0-10% of the vote, the worst performers. Seventy-four challengers performed poorly, receiving between 10-25% of the vote; this is by far the most common vote share for insurgents. Scholars of primary elections consider 25% to be the bottom cut off for a consequential challenge, with 40% the baseline for a "competitive" challenge[302]: 33 challengers received between 25-40% of the vote and 17 were serious contenders with 40-50% of the vote.[303] Thus, 68% of all progressive insurgents received less than 40% of the primary vote and 8% earned between 40-50%. Above 50%, 29 insurgents earned between 50-75% and 14 earned 75-100% of the primary vote. Twenty-two percent of all challengers earned a majority of votes in their primary. Finally, 4 or 2% of challengers did not earn a specific percentage

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[301] Data from Ballotpedia.

[302] Boatright, *Getting Primaried*; Hirano and Snyder, *Primary Elections in the United States*; Jacobson and Carson, *The Politics of Congressional Elections*.

[303] This is only in primary elections. Two challengers who advanced in top-two jungle primaries received over 45% of the vote against the Democratic incumbent in the general election

of the primary vote due to specific or statewide circumstances.[304]
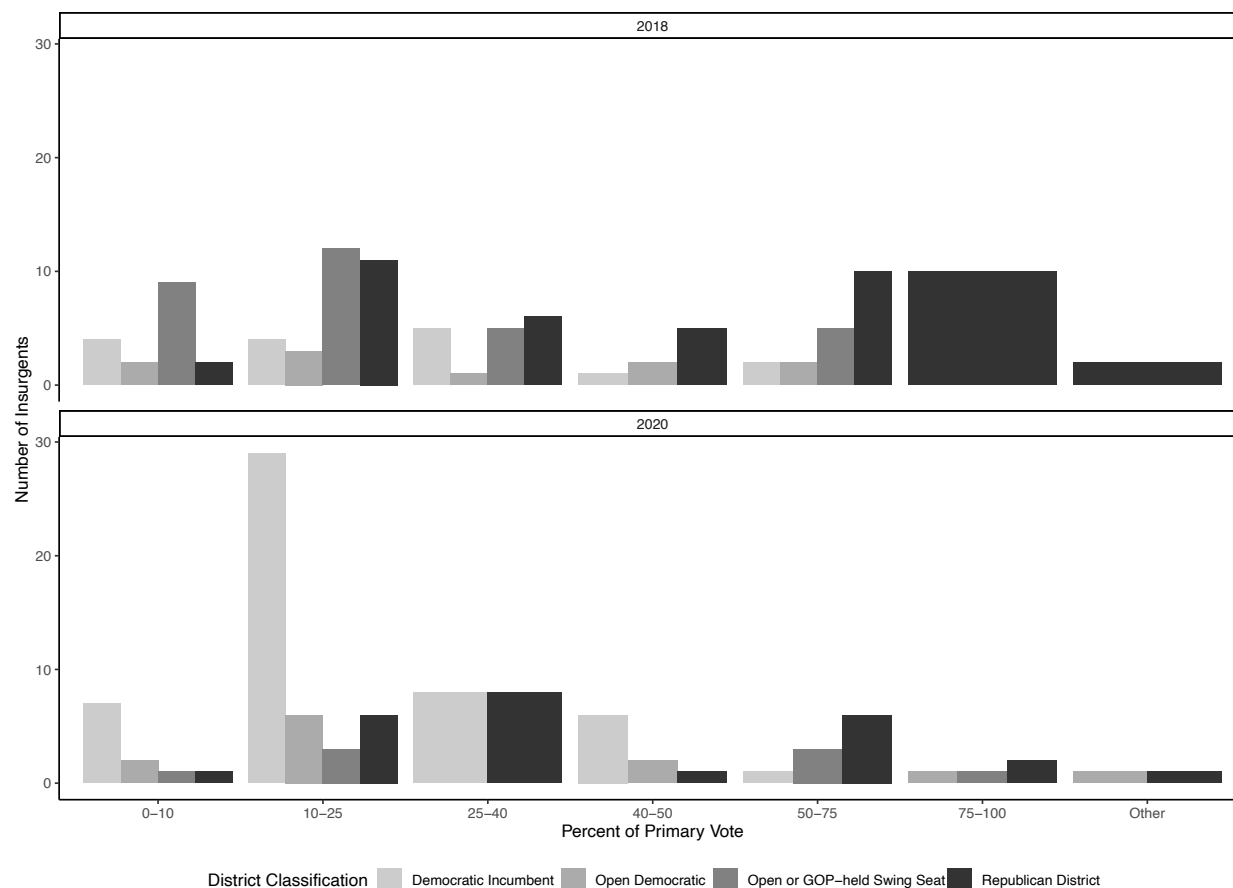
Figure 11: Insurgents' primary vote share. Data from Ballotpedia. N = 199.

As with other findings on the Progressive Insurgency, these broad patterns of insurgents'

primary performance vary by year and type of district, as Figure 11 shows. The biggest discrepancy

by year is in the 10-25% range: where 29% of 2018 challengers received this much of the vote,

46% did in 2020. Two-thirds fewer insurgents in 2020 fell in the lowest category than in 2018 and

essentially the same number earned between both 25-40% and 40-50% of the vote in both years.

As the insurgency shifted away from targeting Republican districts between 2018 and 2020, there

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[304] Data from Ballotpedia; N = 199. These insurgents did not earn a specific percentage of the primary vote because they were either the only declared candidate in the race so the party canceled the primary, they ran in Utah which nominates congressional candidates via convention, or they were nominated as a replacement in a special election, as with now-Representative Nikema Williams in Georgia after Representative John Lewis's death.

was a subsequent significant drop in how many challengers earned more than 50% of the primary vote.[305]

More revealing, however, is how the type of district—and therefore how direct insurgents' institutional challenge to the Democratic Party was—impacted how many insurgents received votes within each range. For instance, only 4% of challengers in Republican districts received less than 10% of the vote, compared to between 16-25% of challengers in all other types of districts. Where half of challengers running against Democratic incumbents earned between 10-25% of the vote, this percentage declines with the strength of the Democratic Party in each descending district; just less than a quarter of challengers in Republican districts earned this much of the primary vote.[306] While 19% of both insurgents running against Democratic incumbents and in Republican districts received between 25-40% of the vote, very few in open Democratic or open and Republican-held swing seats did. In contrast, between 18-20% of challengers in these latter districts won between 40-50% of the vote, while only 10% of challengers to Democratic incumbents did—the most serious losing primary challengers. Four percent of insurgents running against Democratic incumbents received over 50% of the vote, compared to close to 40% of challengers in Republican districts, ten times higher.[307]

Figure 11 above provides a detailed depiction of progressive insurgents' electoral performance by the percentage of the vote they garnered in the primary election. But it does not show whether insurgents won their elections, as, say, getting a third of the vote means defeat in many districts while some challengers won their elections with that share of the vote. Across years and district types, 70 of the 199 progressive insurgents (35%) won their primary election. The

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[305] Data from Ballotpedia; N = 199.
[306] Hirano and Snyder, *Primary Elections in the United States.*
[307] Data from Ballotpedia; N = 199.

pattern of primary election victories roughly maps out as expected based on district type. Only 13% of the 67 insurgents challenging Democratic incumbents won their primaries (or advanced in a state with non-partisan top-two primaries), compared to 46% of the 22 insurgents in open Democratic seats, 31% of the 39 in open or Republican-held swing seats, and 55% of the 71 in Republican districts. Insurgents' rates of primary election victory broadly correlate with how strong the Democratic Party, and therefore its pushback, was in the different types of districts.[308] While swing seats buck the trend, this is likely due to increased party attention to districts that were most likely to flip and elites' and voters' ideas of electability that hurt progressives.[309] Brent Welder, of KS-03, confirmed that "the Democratic establishment often fights progressives running in swing districts the hardest."[310]

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[308] Hirano and Snyder, *Primary Elections in the United States*.

[309] Data from Ballotpedia; N = 199; Hassell, *The Party's Primary*. While pushing a narrative of moderate electability over progressive electability, Hans J. G. Hassell, "Principled Moderation: Understanding Parties' Support of Moderate Candidates," *Legislative Studies Quarterly* 43, no. 2 (2018): 343–69 shows that party elites primarily recruit/support party moderates due to their own ideological sympathies rather than general election strategy. Stephen M. Utych, "Man Bites Blue Dog: Are Moderates Really More Electable than Ideologues?," *The Journal of Politics* 82, no. 1 (2020): 392–96 finds that while moderates historically won more of these seats, their advantage over more ideological candidates has declined over the last decade as polarization has deepened,

[310] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
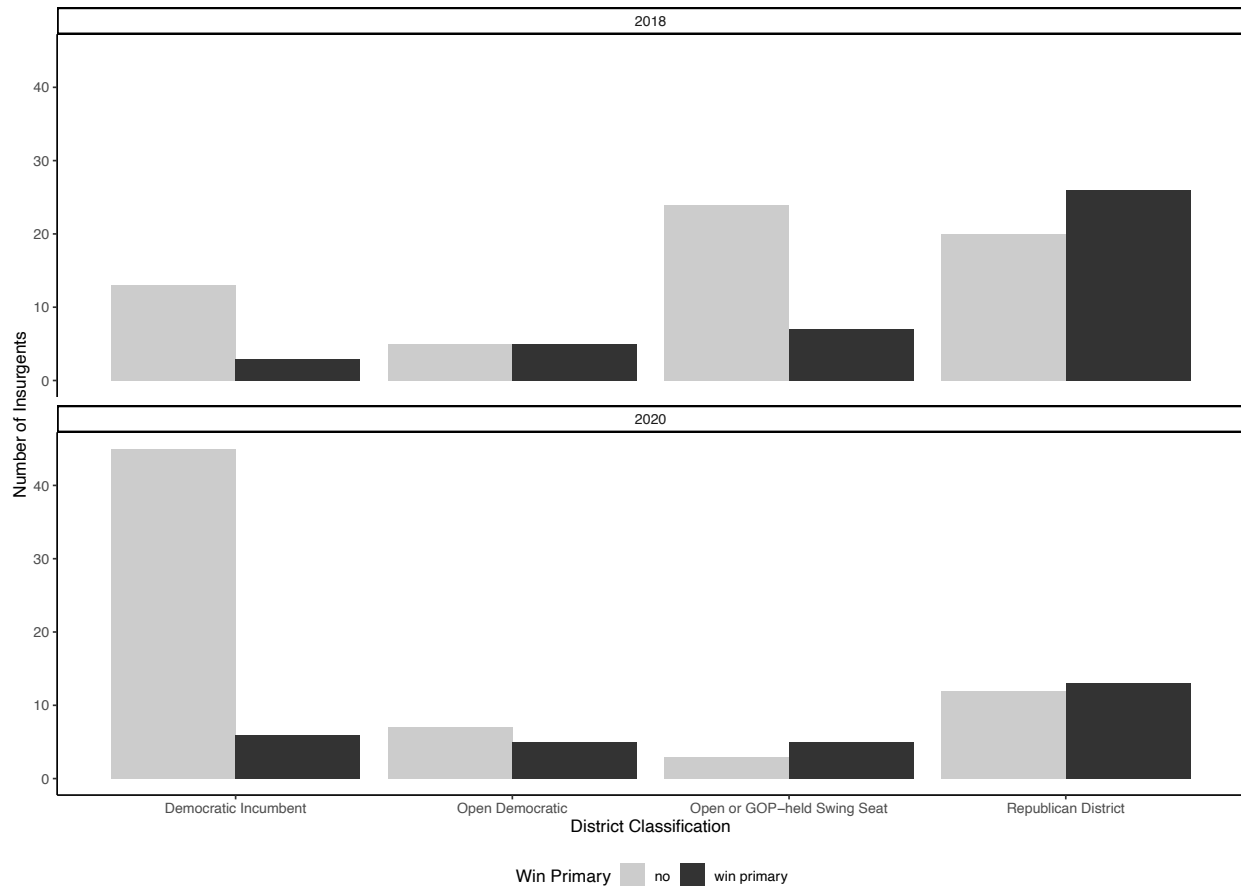
Figure 12: Insurgents' primary victory by district type and year. Data from Ballotpedia. N = 199.

Since the Progressive Insurgency has been dynamic across its two electoral cycles, Figure 12 shows how many insurgents won their primary election depending on their district type and year. The patterns reveal changes in the insurgency's strategy and success rates. In 2018, three (or 19%) of the 16 challengers to Democratic incumbents won or advanced in a top-two primary compared to six (or 12%) of the 51 in 2020. Thus, while over three times as many insurgents primaried Democrats in 2020 and had a higher number of absolute wins—three versus six—a greater percentage of these challengers won in 2018. For insurgents in open Democratic seats, the same absolute number of insurgents won in each year (five), but due to a slight increase in the number of 2020 candidates, their rate of primary victories declined from 50% to 42%. In contrast to these two types of Democratic districts, a much greater percentage of challengers in swing seats

won their primaries in 2020 than 2018 as the number of challengers running in these seats dropped precipitously (63% of eight compared to 23% of 31); in absolute terms, however, 2018 had more such victories with seven instead of five. Finally, while the absolute number of primary victors in Republican districts dropped by half from 26 to 13 between the two cycles, because of the substantial decrease in challengers running for these seats, the percentage who won their primary stayed roughly the same (57% versus 52%).[311] Altogether, 41 of 103 progressive insurgents won their primaries in 2018 and 29 of 96 did in 2020, for success rates of 40% and 30%, respectively, reflecting the insurgency's changing district strategy and corollary different rates of primary election victory.

General Elections

Of the 70 progressive insurgents who won their primaries, how many went on to get elected to the House of Representatives in the general election? Nine of the 41 primary victors in 2018 and seven of the 29 in 2020 (22% and 24%, respectively). Thus, while the insurgency's changing distribution across districts resulted in fewer primary victors in 2020 compared to 2018 and two fewer new members of Congress, a greater percentage of primary victors won their general elections due this shift toward more Democratic districts. Figure 13 shows the distribution of insurgents' general election success across years and district classification. In 2018, two-thirds of the insurgents who won or advanced from their primaries against Democratic incumbents won their general election. In 2020, half of the six did. The general election victors in 2018 were Alexandria Ocasio-Cortez (NY-14) and Ayanna Pressley (MA-07) and in 2020 were Marie Newman (IL-03), Jamaal Bowman (NY-16), and Cori Bush (MO-01). In both years, the insurgents in these districts that lost

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[311] Data from Ballotpedia; N = 199.

the general election—Sarah Smith (WA-09) in 2018, and Shahid Buttar (CA-12), Angelica Dueñas (CA-29), and David Kim (CA-34) in 2020 (the latter two of whom received over 40% of the vote)—all faced the Democratic incumbent in the general election after advancing from a top-two primary. This, in essence, transposed the same intra-partisan dynamics of primary challenges to the general election. Put differently, the only insurgents in these districts who lost the general election were still running against the incumbent; there was no mass defection from Democratic voters away from insurgents once they were the Democratic nominee. All of the insurgents who outright defeated the incumbent in the primary election won their general election, making 7.5% of the progressive insurgents who primaried Democrats members of Congress.[312] While low, this is a nearly five times greater success rate than for all challengers.[313]

The rates of general election victory are also very high, unsurprisingly, when progressive insurgents win or advance in primaries in open Democratic seats. In 2018, all five such candidates won and in 2020, four out of five did. As with the above, the one candidate who lost, Georgette Gomez (CA-53), advanced in a top-two primary and still faced a Democrat in the general election. 2018's victors were Ilhan Omar (MN-05), Rashida Tlaib (MI-13), Jesus "Chuy" Garcia (IL-04), Joe Neguse (CO-02), and Deb Haaland (NM-01) and 2020's were Mondaire Jones (NY-17), Kai Kahele (HI-01), Nikema Williams (GA-05), and Teresa Leger-Fernandez (NM-03).[314]

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[312] Data from Ballotpedia; N = 70.
[313] Jacobson and Carson, *The Politics of Congressional Elections*; Hirano and Snyder, *Primary Elections in the United States*.
[314] Data from Ballotpedia; N = 70.
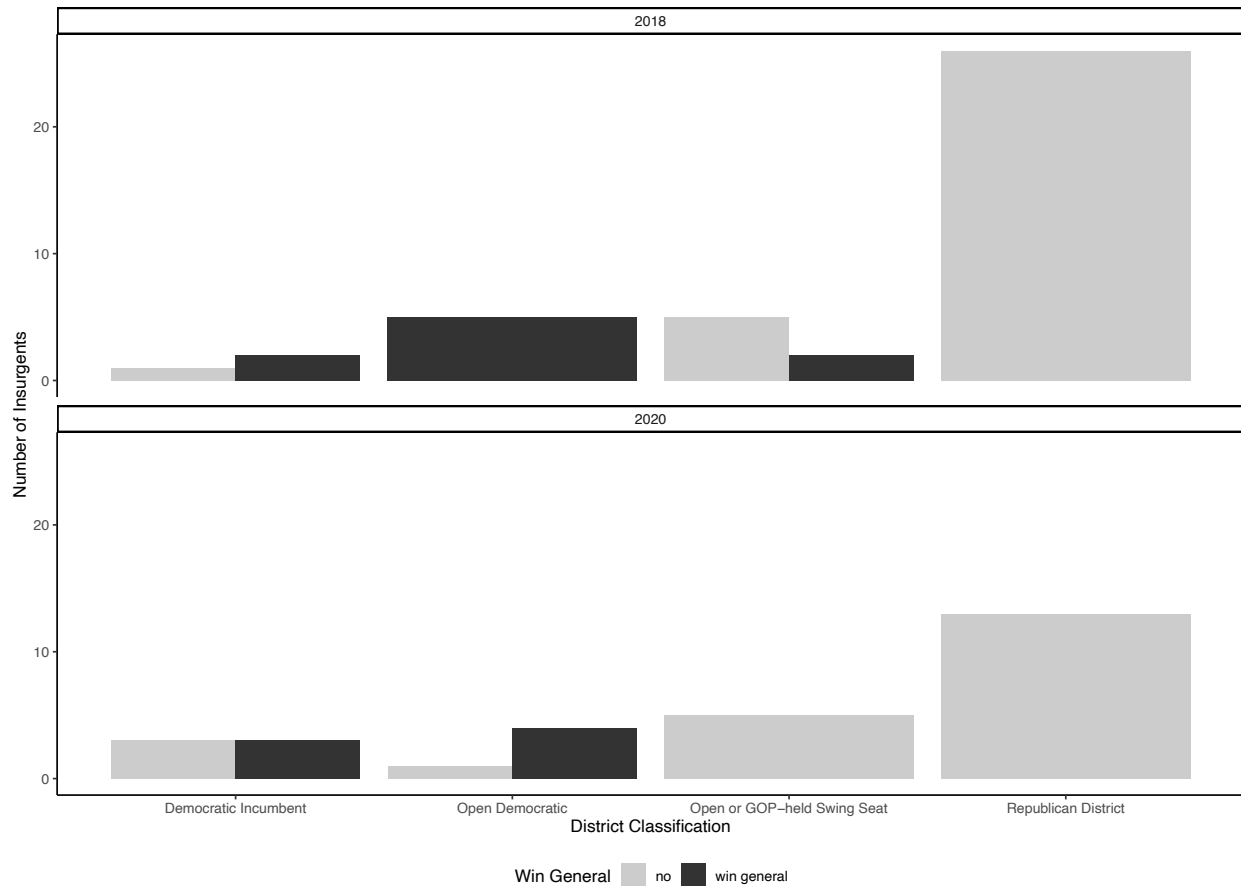
Figure 13: Insurgents' general election victory by district type and year. Data from Ballotpedia. N = 70.

In contrast to insurgents' high rates of general election success in Democratic districts, it was quite low in swing districts and Republican seats (the latter of which had the greatest occurrence of primary election victory). In 2018, two of the seven (or 29%) primary victors in open or Republican-held swing seats won their general elections, while none of the five did in 2020. The winners were Katie Porter (CA-45) and Mike Levin (CA-49). In Republican districts, meanwhile, none of the 26 in 2018 or 13 in 2020 won, with big implications for insurgents' theories of party change that I explore in Chapter 4.[315]

In sum, what type of district a progressive insurgent ran in has large effects on their rates

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[315] Progressive insurgent interviews; Data from Ballotpedia; N = 70.

of primary election and general election victory. While candidates perform worse in primary elections in strongly Democratic districts, these candidates have much better odds of general election success than their peers in more Republican districts. Across the two electoral cycles, 16 of the 199 progressive insurgents became members of Congress. Nine of the 103 challengers in 2018 did compared to seven of the 96 challengers in 2020, showing the first year of the insurgency to have a slightly higher rate of success than the second—8.7% versus 7.3%. Prior to winning her primary, Ocasio-Cortez estimated that "for one of us to make it through, 100 of us have to try."[316] While insurgents' rates of general election victory are indeed low, they are eight times what she thought them to be.

Predictors of Insurgent Primary Election Success

To determine what factors best explain progressive insurgents' different levels of primary election success, I ran several multiple regression analyses with variables concerning the district, the insurgent, or the incumbent. The dependent variable in each of these models is the percentage of the vote each insurgent earned in their primary election. Because of insurgents' special exploitation of primary elections and because I anticipate insurgents' general election outcomes to have more to do with traditional political trends and explanations than anything unique to insurgency, my regression analyses only examine insurgents' performance in primary elections.

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[316] Lears, *Knock Down the House*.

Predictors of Insurgent Primary Election Performance

Independent Variables	All Districts (Model 1)	Democratic Incumbent Districts (Model 2)	Open Democratic Districts (Model 3)	Swing Districts (Model 4)	Republican Districts (Model 5)	All 2018 Districts (Model 6)	All 2020 Districts (Model 7)
Cook PVI	**-0.50 *** **(0.23)**	-0.23 (0.22)	1.85 (1.04)	-1.14 (0.83)	-1.34 (1.06)	-0.67 (0.42)	**-0.69 **** **(0.26)**
Voter turnout 2018	-0.10 (0.30)	-0.03 (0.18)	-0.69 (1.26)	0.05 (0.58)	0.49 (1.15)	0.18 (0.58)	-0.34 (0.35)
District percent white	-0.03 (0.19)	-0.13 (0.14)	1.32 (0.59)	0.17 (0.44)	0.38 (1.39)	0.09 (0.34)	-0.23 (0.18)
Median household income	-0.13 (0.09)	0.06 (0.06)	0.07 (0.44)	-0.08 (0.18)	-0.73 (0.40)	-0.40 (0.21)	0.06 (0.08)
GINI coefficient	-0.95 (3.93)	1.15 (3.11)	-0.45 (21.88)	**16.82 *** **(7.42)**	**-36.38 **** **(12.33)**	-10.45 (8.73)	3.23 (4.47)
Multiple insurgents	-4.84 (3.68)	**-10.40 *** **(3.94)**	-10.72 (19.69)	-3.11 (6.65)	-0.86 (9.32)	-0.41 (6.22)	-7.99 (4.81)
District percent white: insurgent white	0.16 (0.25)	0.08 (0.16)	-3.58 (1.56)	-0.24 (0.52)	-1.10 (1.60)	-0.30 (0.42)	0.28 (0.34)
Insurgent white	-16.93 (17.11)	-9.44 (9.83)	250.02 (114.72)	21.80 (35.61)	81.09 (118.90)	14.81 (28.72)	-23.68 (22.94)

Insurgent woman	3.52 (2.97)	**6.03 *** **(2.61)**	-5.32 (12.75)	-0.08 (4.07)	8.25 (7.97)	3.48 (5.29)	-0.67 (4.03)
Insurgent times run	5.45 (5.08)	4.99 (4.22)	NA	2.44 (5.19)	-2.78 (10.13)	-0.58 (10.42)	**14.80 *** **(6.43)**
Insurgent fundraising	0.06 (0.04)	**0.11 *** **(0.05)**	0.49 (0.17)	0.07 (0.04)	0.21 (0.21)	0.02 (0.04)	0.12 (0.09)
Justice Democrats	-5.06 (5.83)	**15.80 **** **(4.68)**	NA	2.80 (13.00)	2.05 (16.65)	-27.32 (16.12)	NA
Brand New Congress	0.27 (5.76)	6.25 (4.82)	13.51 (20.15)	2.92 (13.68)	23.27 (17.18)	-12.14 (15.88)	1.62 (5.93)
Our Revolution	0.98 (6.09)	**14.98 **** **(5.25)**	15.80 (23.54)	20.80 (15.59)	5.02 (18.03)	-13.08 (16.11)	-2.88 (6.64)
Working Families Party	11.40 (6.72)	**14.19 *** **(6.06)**	3.18 (14.89)	**30.80 *** **(13.67)**	**25.76 *** **(10.08)**	-6.34 (17.83)	14.08 (8.06)
Sunrise	NA	NA	48.82 (19.78)	NA	14.38 (22.89)	NA	2.07 (9.47)
Democratic Socialists of America	-4.33 (7.79)	**13.78 *** **(6.05)**	60.74 (30.65)	NA	NA	-17.39 (26.47)	0.38 (7.32)
Number core endorsements	2.33 (4.69)	-7.05 (3.65)	-33.23 (13.18)	-6.52 (13.46)	-10.30 (13.48)	16.27 (14.77)	-0.60 (5.48)
Previous	4.22	**18.55 *****	34.57	24.19	**-42.09 ***	2.77	6.27

elected office	(5.45)	**(4.16)**	(16.10)	(12.55)	**(18.14)**	(12.31)	(7.45)
Democratic incumbent	6.26 (4.87)	—	—	—	—	20.33 (11.62)	3.63 (5.07)
Republican incumbent	**12.50 *** **(5.58**)	—	—	9.57 (5.65)	—	**13.86 *** **(6.90)**	5.82 (11.41)
Incumbent years in office	—	-0.09 (0.18)	—	—	—	—	—
Incumbent DW nominate score	—	-33.81 (20.94)	—	—	—	—	—
Conservative/ moderate caucuses	—	1.76 (3.35)	—	—	—	—	—
Liberal caucuses	—	-1.91 (2.02)	—	—	—	—	—
(Intercept)	37.86 (23.62)	1.55 (17.75)	-57.44 (86.87)	**-86.33 *** **(31.98)**	**196.60 *** **(94.04)**	91.53 (54.32)	22.37 (27.74)
N	183	61	21	39	62	99	84
R^2	0.37	0.84	0.95	0.87	0.38	0.35	0.61

*** $p < 0.001$; ** $p < 0.01$; * $p < 0.05$.

Table 2: Predictors of insurgent primary election performance. Robust OLS regression.

As Table 2 shows, the impact of each factor and its statistical significance varies based on the type of district and the year. This is to be expected, given the multitude of other ways in which these differences influence progressive insurgents' experiences and success.

Model 1 incorporates all districts across both years. A district's partisan makeup, and the incumbent member of Congress being a Republican matter most for insurgents' primary election vote share. Challengers' primary vote share declined by an average of -0.5 points for every one-point increase in Democrats' share of their district's partisan makeup, measured by the Cook Partisan Voting Index (PVI) scores. They performed an average of 12.5 points better when the incumbent was a Republican. Both significant factors show that the more Democratic a district is and the more direct insurgents' institutional challenge to the Democratic is, the worse insurgents perform in their primary elections. No other variables are statistically significant. In this model with all progressive insurgents' races, the most impactful factors concern the district and the incumbent but none for the insurgent (unlike the subsequent ones).

Model 2 is for insurgents primarying Democratic incumbents, the heart of the insurgency's institutional challenge to the Democratic Party. Previously having held elected office has by far the greatest positive impact on an insurgent's primary performance, followed by endorsements from several core insurgent groups. Multiple insurgents running in the same race results in an average decline of 10.4 percentage points in insurgents' primary vote share. Women performed six points better on average than men. Each $10,000 insurgents raised boosted them by an average of 0.11 points. Among the most impactful, a Justice Democrats endorsement increased insurgents' primary vote share by an average of 15.8 points, an Our Revolution endorsement by 15 points, a Working Families Party endorsement by 14.2 points, and a Democratic Socialists of America endorsement by 13.8 points. Even more influential, insurgents who had previously held elected

office performed an average of 18.5 points better than those who had not. No other variables are statistically significant, including ones on median household income, voter turnout, and Brand New Congress endorsement, which I hypothesized would be among those with the greatest impact along with the other core insurgent organizations. With the exception of the negative influence of multiple challengers in the same district, all of these impactful variables concern the insurgent and the quality of their candidacy and positively impact their primary vote share. Interesting, none regard the Democratic incumbent.

Model 3 shows the impactful factors for challengers in open Democratic districts. There are no statistically-significant variables for predicting these insurgents' electoral success.

Model 4 is for insurgents running in open or Republican-held swing districts. Challengers' endorsement by the Working Families Party was most impactful on their primary election performance, followed by the extent of economic inequality in their district. Here, a Working Families Party endorsement boosted insurgents' vote by 30.8 points on average. Higher levels of income inequality in the district, measured by the GINI coefficient, positively impacts insurgents' primary vote. For every 0.1 increase in a district's score on the GINI index, insurgents earn on average 16.8 points more. These show that the most influential factors in swing districts concern the district and the insurgent equally.

Model 5 shows what factors matter most for insurgents in Republican districts. The only statistically significant variables are the GINI coefficient, if a challenger has held elected office previously, and endorsement by the Working Families Party; the former two, however, negatively impact challengers' primary vote percentage, unlike in the other models where they are statistically significant. In these districts, insurgents who had previously held elected office earned an average of 42 points fewer than those who had no experience. For every 0.1 increase in the GINI coefficient

toward higher inequality, insurgents did an average of 36.4 points worse; that is, insurgents did better in more economically equal districts. The only positive significant impact is endorsement by the Working Families Party, which conferred a 25.7 point boost to insurgents' primary election vote share. While this positive influence from a Working Families Party endorsement is expected, the findings on challengers' previous officeholding experience and economic inequality are surprising. Here, two of these most impactful factors concern the insurgent and one the district.

Model 6 is for insurgents who ran in 2018 without regard to their type of district. The only statistically-significant factor is if the incumbent is a Republican. Insurgents running in districts with a Republican incumbent increased their vote share by an average of 13.8 points. Thus, the only significant factor concerns the incumbent.

Model 7 shows what variables matter most for challengers in 2020. The most influential variables are how many times the insurgent has run for their congressional seat and the partisan makeup of their district. Each additional time that an insurgent ran in their district increased their vote share by an average of 14.8 points. For each one-point increase in how Democratic their district is, insurgents did an average of 0.7 points worse. One of these impactful variables concerns the insurgent and one the district.

These results show that the highest number of significant factors concern the insurgent, particularly their experience holding prior office or running for the seat before and their level of support from insurgent groups and donors. There are fewer significant factors regarding the district, but a district's partisan makeup, extent of economic inequality, and the presence of multiple challengers in the same race matter in a number of models. Last, very few factors pertaining to the incumbent were significant; their partisan identity was significant in a few models that had races across types of districts. Although it varies by model, who the insurgent is and the

resources (broadly conceived) that their campaign accrues are overwhelmingly the largest determinants of their primary election success. Research suggests primary candidate quality matters less in more ideologically-divided parties, but this shows that among ideological insurgents within a party, candidate quality is still relevant.[317] This shows that the insurgent's candidacy and the district they run in have more influence on their electoral success than the tenure and political characteristics of the incumbent.

Most of these results confirm broad expectations, both in the relative importance of particular factors and how they influence insurgents' primary performance. Perhaps the most surprising finding is that insurgents' fundraising is only significant in one model (Model 2) and there, each $100,000 that a challenger raises boosts their vote share by 1.1 percentage point (Table 2 shows each $10,000 as raising their vote by 0.11 points). Following other scholars' findings on challenger success, I hypothesized that fundraising would be among the most impactful variables for all candidates, regardless of their district type or year.[318] I also anticipated that Brand New Congress would be one of the most important endorsements given the group's status at the center of the insurgency, but its endorsement is not statistically significant in any model. Also interesting, the Working Families Party is the only organization whose endorsement is significant outside of Democratic incumbent districts.

Even while showing different degrees of influence on insurgents' primary electoral performances, nearly all of the significant variables exert similarly positive or negative influence across the models. For example, all of the significant group endorsements positively impact insurgents' vote share. However, there are two factors, insurgents' experience holding prior elected office and the district's degree of economic inequality, where the nature of the impact varies across

[317] Hirano and Snyder, *Primary Elections in the United States*.
[318] Ibid; Hassell, *The Party's Primary*.

the models. These discrepancies deserve further attention.

While Model 2 (Democratic incumbent districts) shows challengers having previously held elected office as the most impactful factor for their percentage of the primary vote, Model 5 (Republican districts) shows this to negatively impact challengers' vote share. This puzzling finding on Republican districts, which contradicts findings in other literature, could show an intentional strategy on the part of Democratic primary voters in Republican districts who favor insurgents without (successful) electoral pasts as a general election strategy.[319] That is, when the insurgents need a certain number of Republican voters to cross over and vote for them, strategic and sympathetic Democratic primary voters might see an insurgent having previously held elected office as a greater liability than benefit in the general election. More likely, however, is that these primary voters' preference for insurgents who have never been elected is not intentional nor strategic but random. Candidates tend to be less experienced in seats where their party is weak, which this evidence supports, and voters in both parties have shown increasing appetite for candidates without prior electoral experience in the last several election cycles.[320]

Another discrepancy is between Model 4 (swing districts) and Model 5 (Republican districts) over how income inequality affects challengers' primary vote. In swing districts, challengers do better in more unequal districts while in Republican districts they do better in more equal districts. It is logical that Democratic primary voters in more unequal districts would be more supportive of progressive insurgents. It is much more difficult to hypothesize what explains this opposite trend in Republican districts.

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[319] E.g., Hirano and Snyder, *Primary Elections in the United States*; Gary C. Jacobson, "Strategic Politicians and the Dynamics of U.S. House Elections, 1946–86," *American Political Science Review* 83, no. 3 (1989): 773–93; Jeffrey Lazarus, "Why Do Experienced Challengers Do Better than Amateurs?," *Political Behavior* 30, no. 2 (2008): 185–98.

[320] Hirano and Snyder, *Primary Elections in the United States*; Geoffrey Skelley, "Why More Inexperienced Candidates Are Running — And Winning," *FiveThirtyEight*, January 24, 2022, https://fivethirtyeight.com/features/why-more-inexperienced-candidates-are-running-and-winning/.

Finally, the significant variables in Models 1 (all districts), 6 (all 2018 districts), and 7 (all 2020 districts) deviate from each other only minimally. Both Model 1 and 7 show the negative influence of more Democratic districts; both Model 1 and 6 show the positive influence of running in a district with a Republican incumbent; and Model 7 shows that challengers who have run for their seat before do better. The similarities of these results, when compared to the differences of the models based on district type, suggest that the district type rather than the year has much greater influence on the factors that matter most for insurgents' primary election success.

In sum, what factors have the greatest impact, and if the impact is positive or negative, on insurgent's primary electoral performance depends largely on the type of district that they run in. There are, of course, some similarities across districts, but these regression results show that what matters most varies along with the specific constraints and opportunities insurgents face in each type of district. The next three sections explore several of these important factors—organization endorsement, fundraising, and external constraints like multiple challengers—in greater descriptive statistical depth and in the insurgents' own words.

Core Insurgent and Other Progressive Organizations

> "This time around, we snagged the Justice Democrats endorsement. I can feel the shift in how reporters are covering us on a national level and locally, and, most importantly, how the community and incumbent now view our campaign," Kina Collins, 2020 insurgent in IL-07, on her 2022 challenge.[321]

Extra-party organizations committed to the success of an insurgency over that of its host party are critical for insurgents' advance. Endorsement by a core insurgent organization, as the above

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[321] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.

regression analyses show, is a big deal for progressive insurgents. While these core insurgent organizations are separate, there is great overlap between their objectives and fluidity between their personnel.[322]

The Progressive Insurgency's core groups have endorsed different numbers of candidates and have different rates of success. Justice Democrats has endorsed 71 challengers, 63 of whom ran in 2018 and eight of whom ran in 2020, which is more than any other core insurgent organization. Brand New Congress and Our Revolution have both endorsed 60; Brand New Congress endorsed 26 in 2018 and 34 in 2020, and Our Revolution endorsed 38 in 2018 and 22 in 2020. The Working Families Party endorsed 40 progressive insurgents, 22 of whom ran in 2018 and 18 of whom ran in 2020.[323] Sunrise and the Democratic Socialists of America have endorsed the fewest insurgents, 28 and 10, respectively. Sunrise endorsed nine in 2018 and 19 in 2020 while the Democratic Socialists of America endorsed three in 2018 and seven in 2020.[324] Brand New Congress and the Working Families Party had roughly the same number of endorsees both years. In contrast, both Sunrise and the Democratic Socialists of America slightly more than doubled the number of progressive insurgents they endorsed between 2018 and 2020. Our Revolution nearly halved its number of congressional endorsees between the two years, while Justice Democrats endorsed a mere eighth of the number of 2018 candidates in 2020, the most drastic change for any group. However, in 2018 Justice Democrats focused their resources broadly on only three candidates—Alexandria Ocasio-Cortez in NY-14, Anthony Clark in IL-07, and Cori Bush in MO-01—and intensely on only one, Ocasio-Cortez, which makes their subsequent decrease on paper

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[322] Marantz, "Are We Entering a New Political Era?"

[323] As mentioned in my operationalization of insurgency, not every congressional candidate that Working Families Party endorses is a progressive insurgent. This number only reflects how many of these candidates the organization has endorsed who are insurgents.

[324] Data from organization websites and Wikipedia pages; N = 199.

an increase in candidates in real support.[325]
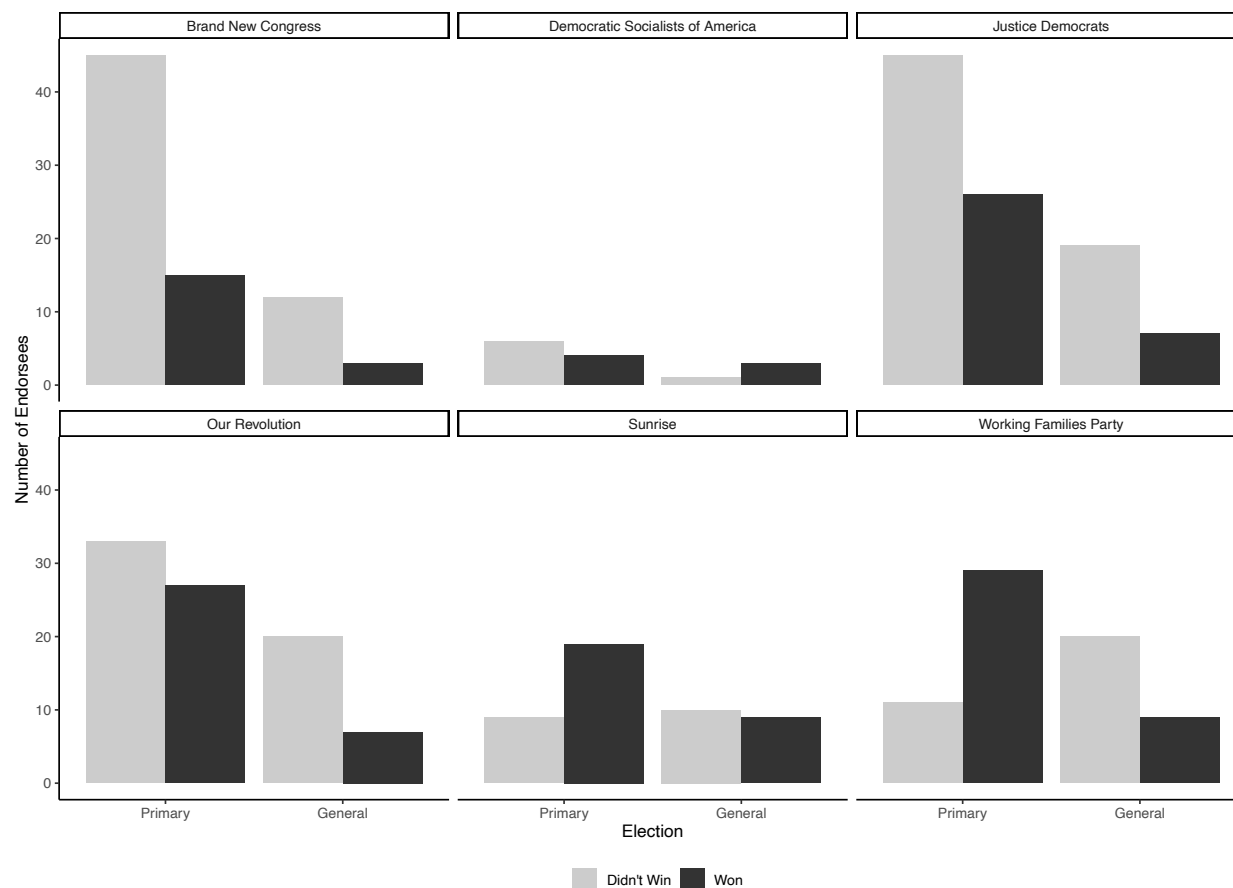
Figure 14: Core insurgent organizations' primary and general election winners. Data from organization websites and Wikipedia pages. N = 151.

Figure 14 shows how many of each of the six core insurgent organizations' endorsees won their primaries and, of them, general elections. Many insurgents received the endorsement of multiple of these groups, so these numbers are not mutually exclusive. Only Alexandria Ocasio-Cortez in 2018 and Jamaal Bowman in 2020 earned the endorsement of all six core insurgent organizations.[326] Of Justice Democrats' 71 endorsees, 19 (27%) won their primary and lost their general and seven (10%) won both. Of Brand New Congress's 60, 12 (20%) won only their

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[325] Marantz, "Are We Entering a New Political Era?"

[326] In her special election in 2021, Nina Turner became the third candidate to win the support of all six core insurgent organizations.

primaries and six (10%) won both their primary and general election. Of Our Revolution's 60, 20 (33%) won their primary and lost their general and seven (12%) won both elections. Of the Working Families Party's 40, 20 (50%) won only their primary elections and nine (23%) won their general election as well. Of Sunrise's 28, 10 (36%) won their primary but lost their general and nine (32%) won both. Finally, of the Democratic Socialists of America's 10, one (10%) won only their primary and three (30%) won both elections.[327] This shows that by far the highest percentage of Working Families Party and Sunrise endorsees won their primaries (regardless of general election outcome) followed by Our Revolution and the Democratic Socialists of America. Interestingly, although they are most closely associated with the insurgency, Justice Democrats and Brand New Congress have the lowest percentage of endorsed candidates win their primaries. Sunrise, the Democratic Socialists of America, and the Working Families Party have the highest percentage of endorsees win election to Congress—Justice Democrats has the lowest. Interestingly, as the above regression analyses show, every group's endorsement significantly aided candidates' primary vote share against Democratic incumbents, save for Brand New Congress and Sunrise. Outside of these districts, only the Working Families Party's endorsement conferred a significant advantage.

Insurgents cited endorsements from either specific insurgent organizations or progressive organizations broadly as aiding their campaigns. For example, Jamaal Bowman, an insurgent in NY-16 who won election to the House in 2020, told the *New Yorker* that on a scale from "1-10," Justice Democrats and Sunrise were a "25" for their contributions to his campaign's success.[328] Thirty percent of progressive insurgents credited Brand New Congress with playing the largest role in their campaign's relative success, 22% said Sunrise, 19% said Our Revolution, 15% said

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[327] Data from organization websites and Wikipedia pages; N = 199.
[328] Marantz, "Are We Entering a New Political Era?"

Justice Democrats, and 7% said Working Families Party.[329] Two chose "other," reporting, respectively, that peripheral insurgent organizations Blue America/the Progressive Democrats of America and insurgent organizations Our Revolution/Working Families Party did the most.[330] Most surprising is how relatively few insurgents answered with Justice Democrats.[331] Organizations' greatest contributions to insurgent campaigns was helping with media coverage and their platform, followed by campaign strategies, fundraising, volunteers, and campaign staff. One challenger said the group gave his campaign "legitimacy," in line with research that shows that advocacy group endorsements' greatest benefit to campaigns can be their symbolic stamp of approval rather than financial resources.[332]

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[329] In the interviews, insurgents supplied the names of these organizations without my prompting. They mentioned the core insurgent organizations along with the peripheral Progressive Change Campaign Committee and Democracy for America. In the survey, I explicitly asked them, "If you were recruited or endorsed by [Justice Democrats, Brand New Congress, Our Revolution, Sunrise, the Working Families Party, or "other"] which played the largest role in your campaign?" It was serious oversight on my part to not list the Democratic Socialists of America here, which I consider to be a core insurgent organization like these. None, however, of the candidates who chose "other" responded with DSA.

[330] While this challenger responded with two insurgent organizations, I did not disaggregate their answers into the other organizations as that would have had the effect of double counting their vote.

[331] Survey data; N = 27. This is likely due to the fact that no candidates who were endorsed by Justice Democrats in 2020 took my survey and the group did less for all its endorsees in the prior electoral cycle. Insurgents were quick to note that Justice Democrats and Brand New Congress in particular were quite unorganized in 2018 and offered few financial resources, before their status was elevated with Ocasio-Cortez's win.

[332] Boatright, *Getting Primaried*. Following this, I asked insurgents what the most useful organization helped with, encouraging them to select all that applied. Survey data; N = 50.
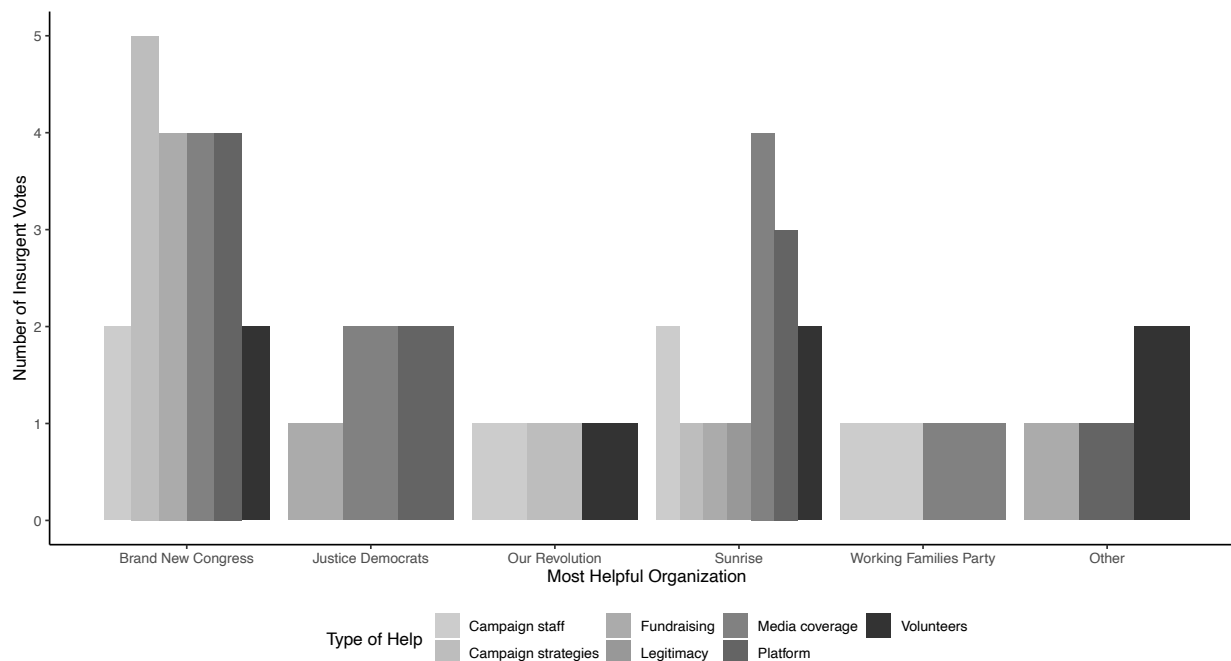
Figure 15: Type of campaign help by insurgent organization. Survey data, where respondents checked all that applied. N = 49.

To gain a better understanding of what resources a specific organization supplied and how they differed from each other, Figure 15 groups candidates' responses about the most helpful organization and type of help together. Insurgents whose primary organization was Our Revolution only said staff, campaign strategies and volunteers, which split equally each with a third of votes and those of Working Families Party split perfectly in half with staff and media coverage. Endorsees of Justice Democrats gave the most—and equal—weight to media coverage and platform assistance, with half as many votes to fundraising. Challengers whose primary organization was Brand New Congress or Sunrise had much more varied answers. Endorsees of Brand New Congress credited it most with campaign strategies, followed by fundraising, media coverage, and their platform, trailed by staff and volunteers. Endorsees of Sunrise, on the other hand, indicated strongly that media coverage was the organization's greatest form of assistance, followed by their platform, and staff and volunteers; the remainder split between campaign strategies, fundraising, and legitimacy. The takeaway here is that different insurgent organizations

aided candidates with different campaign resources; while nearly all helped campaigns gain media coverage, a resource such as staff was a large benefit to insurgents from the Working Families Party but not part of Justice Democrats's contribution.[333]

While most insurgents sang these groups' praises, this was not universally so. A few candidates reported receiving no help from the core insurgent organization.[334] Albert Lee, a 2020 insurgent in OR-03, who pursued and earned Brand New Congress's support, said that he did not consider it to be a "major endorsement." It channeled his campaign toward auxiliary firms like Grassroots Analytics, which provides candidates with a database of national progressive political donors, that took a cut of everything his campaign raised, regardless of whether it was via their services. He said that "ultimately, it really felt like we were working for these companies versus working for the campaign."[335] More broadly, several other challengers thought that their campaigns focused too heavily on pursuing endorsements, many of which came too late to be of much help or were "endorsements on paper only."[336]

Progressive insurgents benefitted from strong connections to their local progressive communities. One candidate built a local progressive coalition, with various groups and activists organizing for everything from climate change to police brutality, united around the common "working class issues" that she ran on.[337] For another who nearly toppled the incumbent, organizing with local advocacy and mutual aid groups during the summer of 2020 racial justice protests and pandemic proved key.[338] Challengers also cited endorsements by high-profile individuals, local progressive groups, and unions as instrumental in raising their campaign's

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[333] Survey data; N = 49.
[334] Survey data.
[335] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[336] Lauren Ashcraft, interviewed by Amelia Malpas, September 17, 2021.
[337] Rachel Ventura, interviewed by Amelia Malpas, August 2, 2021.
[338] David Kim, interviewed by Amelia Malpas, September 12, 2021.

profile, increasing their fundraising, and abetting their success. Three credited Bernie Sanders's endorsement as leading to a spike in donations; as an example, Sanders sent emails and hosted events for Julie Oliver in TX-25, which was a critical resource. Endorsements from insurgent Representative Ayanna Pressley and former Democratic presidential candidates Marianne Williamson and Andrew Yang had similar effects.[339]

Finally, not all ostensibly progressive groups were supportive of progressive insurgents' primary bids. Some challengers broadened their conception of what the Democratic Party is beyond the "proper party organization" based on their experience with advocacy groups "within the higher ecosystem of nonprofits" closely aligned with the party.[340] Organizations like pro-choice Emily's List and Planned Parenthood and environmental League of Conservation Voters and Sierra Club supported establishment Democrats over them. Eva Putzova, a 2020 insurgent in AZ-01, had previously received the Sierra Club's endorsement when she was a city councilor in Flagstaff. Even though the Green New Deal is one of their prioritized policies, which Putzova supported and the Democrat she was challenging did not, the group did not continue its endorsement of her. She reported a similar situation with Planned Parenthood, where a representative told her that the group would not endorse a candidate challenging a Democratic incumbent, despite the fact that earlier in his career, the incumbent had voted to criminalize abortion.[341] (One notable exception with Planned Parenthood was its endorsement of Jessica Cisneros's 2020 challenge to Representative Henry Cuellar, who is a rare unabashedly pro-life Democrat.) This echoes Sanders's description of the contentious dynamics between most

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[339] Progressive insurgent interviews.
[340] Eva Putzova, interviewed by Amelia Malpas, July 23, 2021. This broadly aligns with scholars' group-centered conceptions of political parties, e.g., Bawn et al., "A Theory of Political Parties."
[341] Eva Putzova, interviewed by Amelia Malpas, July 23, 2021; Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021; Progressive insurgent interviews.

progressive organizations and unions' commitment to incumbent or establishment Democrats, even when the insurgents' policy was more closely aligned with the groups', that he experienced in his first presidential campaign.[342]

Many insurgents running in open Democratic or swing seats benefitted from union support.[343] Two credited National Nurses United in particular as being instrumental to their campaigns. While many of the challengers had backgrounds in advocacy and organizing, very few had personal union experience. Randy Bryce, a 2018 challenger in WI-01, who had a long history of being active in his union and organizing with others was the most notable exception. This helped his campaign win the endorsement of many unions, since they understood that his support was not mere rhetoric.[344]

Despite running to advocate for the multiracial working class, progressive insurgents challenging Democratic incumbents have generally failed in their attempts to earn support from organized labor.[345] One challenger explained, "Unless you've got big money, unions are not going to endorse you. Even though [the incumbent's] labor policy is terrible, and he supports all these terrible trade deals, they're not going to not endorse him … they're not going to endorse me because they don't think I can win and union endorsements are cowardly as hell."[346] Jen Perelman, a 2020 insurgent in FL-23, is considering running a second time, but will not until she gets at least three local unions to buck the Democratic incumbent and endorse her campaign. To win, she said, "We need unions."[347] Mel Gagarin, a 2020 candidate in NY-06 and a member of the Democratic Socialists of America (DSA), diagnosed a broader union problem with the Progressive Insurgency

[342] Sanders, *Our Revolution*.
[343] Progressive insurgent interviews.
[344] Randy Bryce, interviewed by Amelia Malpas, September 13, 2021.
[345] Progressive insurgent interviews.
[346] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[347] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.

and DSA. There was a discrepancy in his race between local unions' political leadership formally endorsing the Democratic incumbent, even while some rank-and-file members supported his campaign.[348] These findings generally contradict past studies, which show that unions do support primary challengers.[349]

Fundraising

Numbers and Districts

> "As long as races are won and lost predominantly on fundraising, incumbents and corporate sellouts will always have a massive advantage because it's a numbers game of getting the message to all the people who aren't paying attention," Mark Gamba, 2020 insurgent in OR-05.[350]
>
> "I would be surprised if you found a single candidate who said, 'yay, fundraising, my favorite thing to do,'" Arati Kreibich, 2020 insurgent in NJ-05.[351]
>
> "Progressive fundraising sucks. Period," Jason Call, 2020 insurgent in WA-02.[352]

Money makes campaigns go round. Fundraising totals are indicative of popular support of progressive insurgents' campaigns as well as their ability to procure other valuable campaign resources such as staff or literature.[353] The regression results above, however, find that insurgents' fundraising is only associated with their vote share in a significant way for those who primary Democratic incumbents. Figure 16 shows the distribution of progressive insurgents' primary election fundraising by type of district, with a final facet for those who advanced in a top-two

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[348] Mel Gagarin, interviewed by Amelia Malpas, September 17, 2021.
[349] Boatright, *Getting Primaried*.
[350] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.
[351] Arati Kreibich, interviewed by Amelia Malpas, August 16, 2021.
[352] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[353] Hassell, *The Party's Primary*.

primary and faced a Democratic incumbent in the general election.[354] With the exception of those running in open Democratic seats, progressive insurgents raised more in 2020 than in 2018 but not dramatically more so.[355]
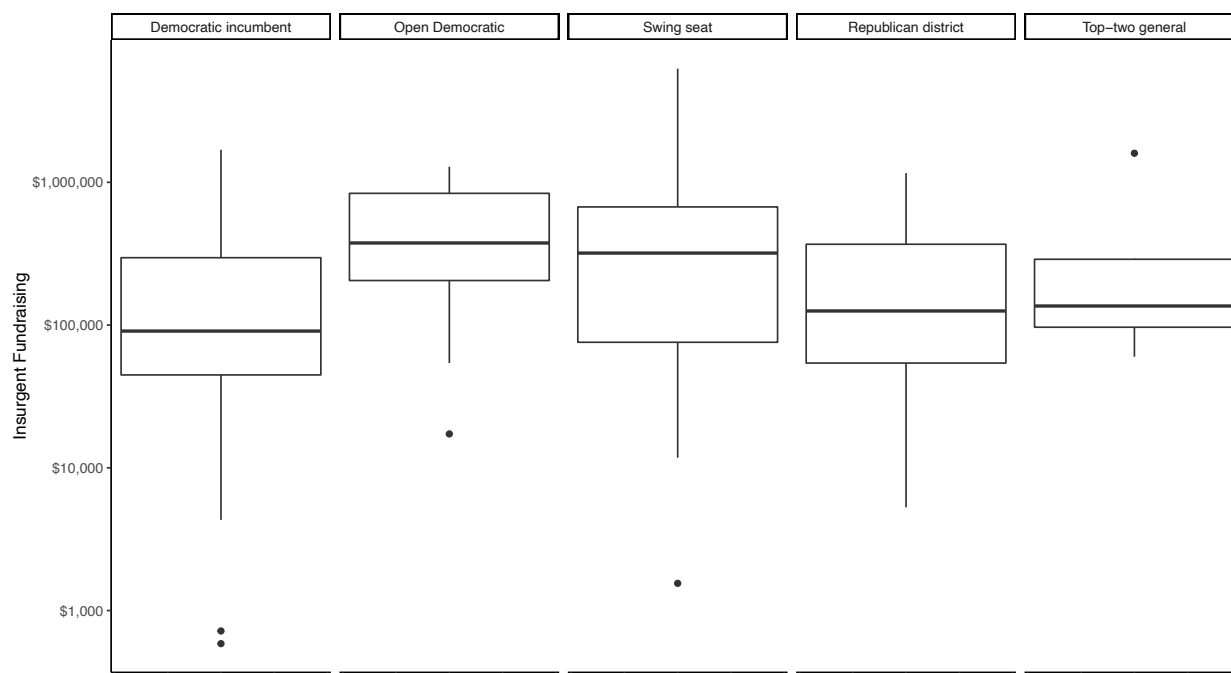
Figure 16: Insurgent fundraising by district type. Data from the Federal Election Commission. N = 203.

Progressive insurgents primarying Democrats raised the least money. The lowest reported fundraising total for an insurgent primarying a Democratic incumbent was $586 while the highest was $1,689,144. Within this broad range, a quarter raised less than $44,743 and a quarter raised more than $296,449. While low compared to incumbent fundraising, over three-quarters of insurgents raised much more than the average primary challenger to an incumbent in either party;

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[354] These numbers come from candidates' pre-primary Federal Election Commission reports, which they file about a week before their elections. Fourteen of the 199 insurgents did not raise enough money to file with the Federal Election Commission (FEC), so there is no financial data for them. Boatright 2013 contends that few challenger candidates who receive less than 25% of the vote raise over $5,000, after which all campaigns must file with the FEC. The Progressive Insurgency shows more complex dynamics between fundraising and primary vote share.

[355] Because insurgents' fundraising and spending are so strongly correlated, with the latter trailing the former, I do not engage with challengers' spending separately.

only in 2016 did challengers' average fundraising exceed $25,000.[356] Progressive insurgents in open Democratic seats were much more financially successful: the lowest total was $17,274 and highest was $1,287,022. Within this, a quarter raised less than $205,168—much better than a majority of insurgents primarying incumbents—and a quarter raised more than $837,388. These insurgents also raised much more than the average candidate in an open primary in either party, which was just less than $60,000 in 2016.[357]

Insurgents running in open or Republican-held swing seats were also competent fundraisers, although they had a much broader range of financial contributions. The lowest fundraising total was $1,552 and highest was $6,251,757—by far the greatest of any challenger in the Progressive Insurgency. Here, a quarter raised less than $75,787 and a quarter raised more than $672,585. Challengers in Republican districts had the second poorest financial showing after those running against Democratic incumbents. The lowest total was $5,290 and highest was $1,160,376. Within this, a quarter raised less than $54,514 and a quarter raised more than $368,445. Finally, challengers who progressed past a top-two primary in California or Washington generally raised low amounts of money in their general elections. The worst fundraiser raised $60,015 and best raised $1,598,994, with a quarter raising less than $99,906 and a quarter more than $522,350.[358]

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[356] Zachary Albert, "Trends in Campaign Financing, 1980-2016," *Report for the Campaign Finance Task Force*, 2017, https://bipartisanpolicy.org/download/?file=/wp-content/uploads/2019/05/Trends-in-Campaign-Financing-1980-2016.-Zachary-Albert..pdf.

[357] Albert, "Trends in Campaign Financing."

[358] Data from the Federal Election Commission, https://www.fec.gov/; N = 189.
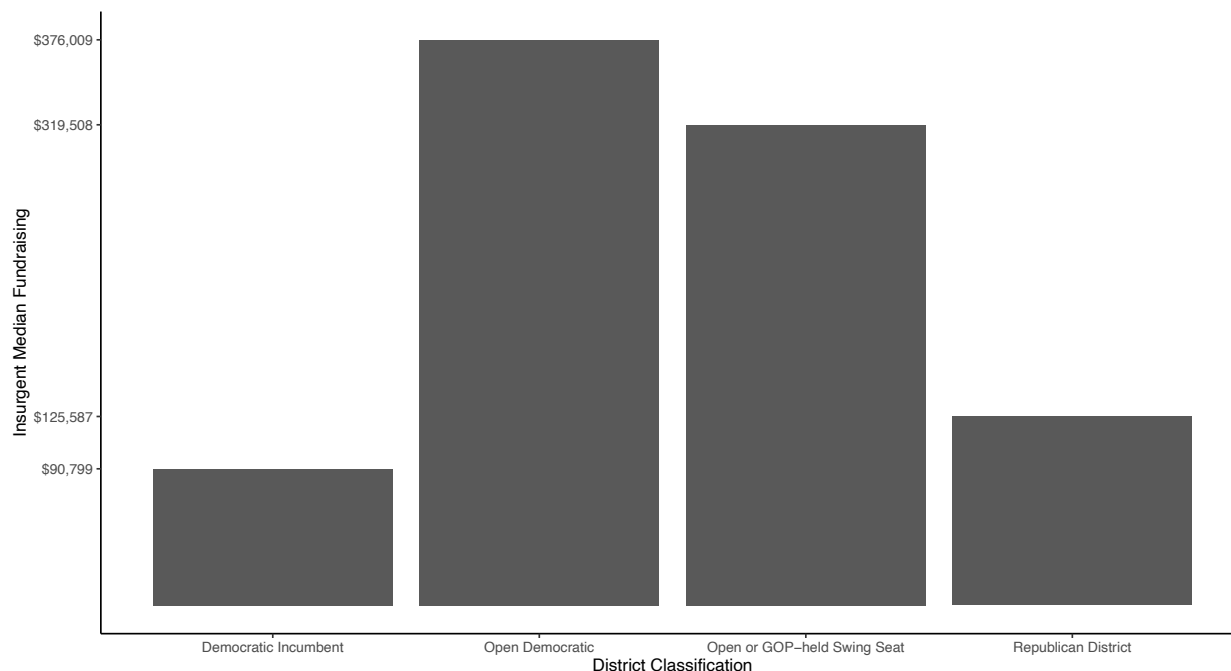
Figure 17: Insurgent median fundraising by district type. Data from the Federal Election Commission. N = 185.

To belabor the point, as the above discussion suggests and as Figure 17 shows, there are large discrepancies between types of districts in the median amount that progressive insurgents raised in their primary elections. Somewhat surprisingly, given that it is the heart of the insurgency and the only type of district where fundraising is a statistically-significant predictor of insurgents' primary vote share, insurgents primarying incumbent Democrats raised the least. These candidates' median fundraising was $90,799. That is over $30,000 less than their peers in Republican districts and over four times less than the median haul of $376,609 in open Democratic seats. Challengers in open or Republican-held swing seats are close to those in open Democratic seats with the second highest median: $319,508. From a strategic perspective, it makes sense that insurgents with real chances of winning not only the primary election but the general as well would attract the most financial support. These candidates could also win the support of Democratic donors who are off-put by insurgents' challenge of a sitting Democrat but are sympathetic enough to their policy agenda to financially support the candidates when they are not directly

institutionally challenging the Democratic Party.[359] Several candidates raised this issue, as potential donors were off-put by their challenge to a sitting Democrat.

The amount of progressive insurgents' fundraising that came from within their district varied dramatically by their type of district.[360] Almost half (48%) of insurgents running against Democratic incumbents reported that a majority of their fundraising came from their district. None in open Democratic seats and only 33% and 20% in swing and Republican districts, respectively, did so.[361] These findings are part of a broader trend of a growing share of not just insurgents' but all congressional candidates' contributions coming from outside of their constituency: in 2020, nearly half of Democratic congressional candidates' funds were from out of state.[362] These changes are heightened for ideological challengers due to political groups' increasing use of primaries, the rise of digital fundraising infrastructure, and the nationalization of American politics.[363] A few challengers received small donations from all 50 states—clear evidence of the appeal of insurgency and nationalized politics. These fundraising findings are indicative of the local-national tension between resources and votes within the Progressive Insurgency.

Thus, progressive insurgents primarying incumbent Democrats raised the lowest amount of candidates in any type of district, but they also had by far the most in-district financial support— likely a large part of why fundraising is only a significant predictor of their primary vote share in these districts. These patterns could be explained by various factors, such as national progressive donors' correct perception that insurgents have higher chances of winning election when they are not challenging a Democrat and therefore putting their dollars toward races where they think the

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[359] Data from the Federal Election Commission; N = 185.
[360] To gauge local versus national enthusiasm for the insurgent's campaign, I asked them in the survey if a "majority of your fundraising dollars came from within your district?" where they could answer with either "yes" or "no."
[361] Survey data; N = 30.
[362] "Unprecedented Donations Poured into 2020 State and Federal Races," *OpenSecrets*, November 19, 2020, https://www.opensecrets.org/news/2020/11/2020-state-and-federal-races-nimp/.
[363] Boatright, *Getting Primaried*.

reward is most likely. It could also be that the possibility of a viable progressive challenge to an incumbent Democrat who has been in office for one or two decades, which most challenged Democrats have been, galvanizes politically engaged residents of a district into giving funds to that challenger. That is, this could be an indication that many engaged voters in these districts do want to see their incumbent primaried from the left.

Very few candidates received any funds from official local, state, or national Democratic Party organizations. The median party contribution was $0, with a few challengers in swing and Republican districts receiving up to $4,000, primarily in Texas. Predictably, no challengers in the two types of Democratic districts received any party funding. Further, some challengers contributed to their own campaigns, which is quite unusual for slick, party-supported campaigns (none of the incumbents the insurgents primaried, for example, donated a cent to their own reelection campaigns). Insurgents' median self-contribution was $12 and only a quarter gave their campaigns more than $1,906. This stands in contrast to challenger campaigns at large which receive roughly a third of their funds from self-financing, which is not currently limited by the Federal Election Commission.[364] The maximum self-contribution was $119,300, which is significant both as a self-funding outlier and as an indicator of the candidate's unusually high personal wealth compared to other candidates in the Progressive Insurgency.[365]

The Bernie Model: Digital Donations and Principles Over Cash

> "There's a myth where I went into this thinking, 'Oh, AOC, Bernie, and progressives are really changing the whole thing. They're making it possible to live off of and win from online small dollar donations.' But unless you're Bernie or AOC, or truly just a handful of people, that doesn't work," Agatha Bacelar, 2020 insurgent in

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[364] Boatright, *Getting Primaried*; Jacobson and Carson, *The Politics of Congressional Elections*.
[365] Data from the Federal Election Commission; N = 185.

CA-12.[366]

"I was really bad at call-time. My finance director hated me," Laura Moser, 2018 insurgent in TX-07.[367]

"The big thing that still really plagues the left is the inability to fundraise the way that Republicans can," Roza Calderón, 2018 insurgent in CA-04.[368]

"It's really hard to raise money when you're trying to represent people who don't have much money," David Benac, 2018 insurgent in MI-06.[369]

"I was like, 'how do working class people run for office?' This is impossible," Nick Rubando, 2020 insurgent in OH-05.[370]

One of Bernie Sanders's innovations in his 2016 presidential campaign was his methods of fundraising. Digital small-dollar donations, the average of which was $27, fueled the Sanders campaign, instead of large contributions from wealthy individuals and political action committees (PACs).[371] This fundraising infrastructure freed Sanders from traditional candidate fundraising activities, like call-time with donors or schmoozing with elites at private galas—or wine caves—where admission costs thousands of dollars a head. Sanders's campaign raised over $200 million from contributions that were $200 or less.[372] In foregoing traditional sources of fundraising as part of his ideological challenge to the Democratic Party's politics, Sanders took a gamble. And it worked—because of his high profile, his singular candidacy, and that his campaign catalyzed a political movement with supporters across the United States.

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[366] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021.
[367] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.
[368] Roza Calderón, interviewed by Amelia Malpas, August 20, 2021.
[369] David Benac, interviewed by Amelia Malpas, September 16, 2021.
[370] Nick Rubando, interviewed by Amelia Malpas, August 30, 2021.
[371] Sanders, *Our Revolution*; Muldoon and Rye, "Conceptualising Party-Driven Movements."
[372] Anthony Corrado and Tamsin Braverman, "Presidential Candidate Fundraising: An Exception to the Rule?," in *Campaigning for President 2016: Strategy and Tactics*, ed. Dennis W. Johnson and Lara M. Brown, 3rd ed. (New York: Routledge, 2017).

While progressive insurgents emulated this strategy and forwent traditional fundraising techniques, they quickly learned of its constraints when transposed to lower-profile races.[373] Candidates were candid about this difficulty and how they had assumed that they would be able to run a viable campaign in this manner.[374] Patrick Nelson, a 2018 challenger in NY-21, said, "AOC is right. It's true that she's able to do her job better because she's not dialing for dollars. But the percentage of campaigns that can pull off that strategy is not the percentage of campaigns that we need to form a winning coalition."[375] In fact, before she became "AOC" the political phenomenon, this was a problem for Ocasio-Cortez's campaign. When they recruited her to run, founders of Justice Democrats and Brand New Congress promised her that she would not have to dial for dollars. But after nearly a year of raising only hundreds of dollars each month, these Ocasio-Cortez campaign advisors disagreed about whether to continue this strategy or forgo it. For the last few months of her 2018 primary campaign, Justice Democrats exclusively spent its resources on her campaign.[376] Renown is a critical component of this fundraising model, which very few challengers have enough of to make it work with the same success of Sanders or Ocasio-Cortez.[377]

Most insurgents' campaigns were largely funded by small-dollar contributions, they just were not enough to run a viable campaign. Several reported bringing in 90-95% of their fundraising totals from small-dollar digital donations. This contrasts with all Democratic House candidates, who receive an average of 19% of their total funds from small-dollar donations.[378] Studies find that in the early 21st century, challenger campaigns raise more from individual donors than incumbents or than challengers have done in the past, due to the digital fundraising infrastructure

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[373] Hassell, *The Party's Primary*; Progressive insurgent interviews.
[374] Progressive insurgent interviews.
[375] Patrick Nelson, interviewed by Amelia Malpas, August 17, 2021.
[376] Grim, *We've Got People*; Marantz, "Are We Entering a New Political Era?"
[377] Hassell, *The Party's Primary*; Survey data.
[378] "Unprecedented Donations Poured into 2020 State and Federal Races."

available to them.[379] For the consistency of cash and commitment of supporters, several candidates focused on trying to get individuals to give recurring donations: one challenger reported that a third of their donors gave monthly. In line with Sanders's famous $27 average, Shaniyat Chowdhury in NY-05 in 2020, said that his "average dollar donation was about $30. These are people who worked at retail, people who were working in construction, as teachers. It was these folks who really resonated with the policy that we're pushing for and that supported us."[380]

Following in Sanders's footsteps, many insurgents tried to or thought they could replace traditional fundraising methods, especially "call-time," with a digital operation.[381] Jen Perelman, a 2020 challenger in FL-23, explained, "People who can't reach regular people need to do call-time … Bernie Sanders didn't do call-time. He didn't need to do call-time because he reached mass amounts of people and got their small dollar donations. That's what our strategy was."[382] While most insurgents flirted only briefly or semi-seriously with call-time, a few were dedicated to "disciplined" call-time. One clarified that 40 hours a week of call-time is what it takes to raise enough money to run a competitive campaign—something they usually fell short of. Julie Oliver, who ran both years in TX-25, said that she was much more committed to call-time in her second race. She was so committed, in fact, that she attracted the attention of the DCCC for their "red to blue" list of target races, which brought in wealthy donors beyond the progressives she had attracted earlier in the campaign (discussed in the last chapter). Regardless of how much of their time they spent doing call-time, insurgents came away understanding how central fundraising is to a campaign and the role of the candidate in procuring the funds. They found, in sum, that "being

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[379] Boatright, *Getting Primaried*; David Karpf, *The MoveOn Effect: The Unexpected Transformation of American Political Advocacy* (New York: Oxford University Press, 2012); Ollie Gratzinger, "Small Donors Give Big Money in 2020 Election Cycle," *OpenSecrets*, October 30, 2020, https://www.opensecrets.org/news/2020/10/small-donors-give-big-2020-thanks-to-technology/.
[380] Shaniyat Chowdhury, interviewed by Amelia Malpas, August 24, 2021.
[381] Progressive insurgent interviews.
[382] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.

a candidate equals being a fundraiser."[383]

Many challengers chasing small-dollar donations by phone relied on the services of Grassroots Analytics, a firm that provides lists of donors who have given to progressive Democrats in the past. For a few, this was a Godsend; one was amazed that strangers they called via Grassroots Analytics would give "vast sums" of money. But that so many insurgents were reliant on this same firm and the same list of donors had drawbacks: essentially, the challengers competed with each other for a limited pool of resources. One insurgent who launched their campaign relatively late into the 2020 electoral cycle found that many donors had already given their allocated political funds.[384] Candidates also fundraised through their email lists and social media. For some, Facebook advertisements were "freakishly lucrative [since] you raise some money, put it back on Facebook, and you can buy any election. That's what we learned from Trump."[385]

Core insurgent and peripheral groups' endorsements helped progressive insurgents attract small-dollar donations.[386] In ranking the importance of national political groups' endorsements for their small-dollar fundraising, only three progressive insurgents (10%) responded with a "1" or "2," the lowest choices. While 10 challengers (34%) said "3," 16 (50%) answered with a "4" or "5," the highest ratings.[387] Morgan Harper, a 2020 candidate in OH-03 whom Justice Democrats endorsed, was one of the few whose fundraising was viable. She said, "We ended up raising almost a million dollars, with no corporate PAC money and an average contribution of under $100. I was so surprised by that."[388] Kina Collins, 2020 challenger who is running again in 2022 with the

[383] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021; Progressive insurgent interviews.

[384] Progressive insurgent interviews.

[385] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.

[386] Due to many insurgents' emulation of Sanders's small-dollar, digital fundraising model, I asked insurgents in the survey to "rank how important national political groups' endorsements of your campaign were for garnering nationwide small-dollar donations."

[387] Survey data.

[388] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.

backing of Justice Democrats, affirmed, "we ended up raising more money in the first 30 days of my campaign than the entire 10 months last time."[389] One 2018 challenger said that Justice Democrats and Brand New Congress held joint fundraisers for them and their slate-mates, but they never received more than a small amount of money from these events. This shows the publicity and legitimizing effect on insurgents' campaigns from political and advocacy groups' endorsements. This corresponds with past research on how groups' symbolic support can be greater for candidates than their direct financial contributions, which the FEC limits to $5,000 per cycle.[390] That is, while some endorsing organizations also aided candidates with staff or other concrete support, most campaigns still benefited resource-wise from the endorsements even if the organization did nothing more than announcing their support of the candidate.

Continuing in their principled vein, many challengers did not accept PAC contributions, which are normally a substantial portion of House candidates' fundraising.[391] Some understood swearing off this money to hurt their chances of winning their elections, while others saw it as helping their image as a candidate of principles, unafraid to walk the walk.[392] Challengers were also distinguished by whether they forwent only corporate PAC contributions or all PAC contributions, regardless of the source. Only criticizing corporate PAC funds, Brent Welder, a 2018 candidate in KS-03, created the no corporate PAC money pledge which Justice Democrats subsequently adopted. Its growth, he believed, was good both practically through limiting corporate money in politics and from a messaging standpoint.[393]

On the other hand, some forswore all PAC money, even from organizations that they were

[389] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[390] Boatright, *Getting Primaried*.
[391] Jacobson and Carson, *The Politics of Congressional Elections*.
[392] Progressive insurgent interviews.
[393] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.

politically aligned with. It is worth making explicit here that many core insurgent groups, like Justice Democrats, are PACs, even if challengers have a more favorable view of these organizations than PACs in general. Jen Perelman, 2020 insurgent in FL-23, elaborated that she was "never going to take corporate money. I took no corporate dollars and no PAC money, not even from unions that we were endorsed by."[394] Julie Oliver, a 2018 and 2020 challenger in TX-25, "truly took no PAC money" because she wanted unions to know that she "had their back not because they're writing me a check but because I really care about improving the conditions for workers."[395] This is an interesting development given that before the Tea Party in the late 2000s, PACs were quite reluctant to donate to challenger campaigns.[396] Furthermore, studies show that political donations buy access, which can lead to policy influence, but not policy itself, which would imply that insurgents are indeed making their lives harder by not accepting funds from willing groups.[397]

In many ways the Progressive Insurgency differs from Occupy Wall Street and earlier expressions of the weak American left in its relative prioritization of outcome over procedure. Its candidates' anti-PAC stance, which hinders their already small chances of winning, is similar to Occupy's focus on the means rather than the ends. The progressive insurgents are not the first politicians caught in the apparent tension between their principles and pragmatic decisions. James Q. Wilson famously called candidates willing to sacrifice their chances of winning personal power for their ideas "amateurs" in contrast to "professionals," who prioritize their personal or partisan victory and are not motivated by strong policy beliefs.[398] From a different angle, Walter Stone and

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[394] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[395] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.
[396] Boatright, *Getting Primaried*.
[397] E.g., Joshua L. Kalla and David E. Broockman, "Campaign Contributions Facilitate Access to Congressional Officials: A Randomized Field Experiment," *American Journal of Political Science* 60, no. 3 (2016): 545–58.
[398] James Q. Wilson, *The Amateur Democrat: Club Politics in Three Cities* (Chicago: University of Chicago Press, 1966).

Alan Abramowitz dispute that activists privilege candidates' policy purity over electability pragmatism and that these are mutually-exclusive political characteristics.[399] Most of the progressive insurgents expressed views along these lines: while acknowledging that their limited financial resources negatively impacted their ability to campaign in traditional ways, they also believed that their principled stances on fundraising enhanced their support and their share of the vote.[400]

Some progressive insurgents did accept PAC contributions, the amount of which parallels their broader fundraising patterns by district. While the median PAC contribution to challengers of Democratic incumbents was $0, with a quarter taking in more than $2,300, the median for candidates in open Democratic districts was $24,253 with a quarter raising over $51,800. In swing districts, insurgents' median PAC contribution was $4,000, with a quarter bringing in more than $20,400, and in Republican districts, the median PAC contribution was $1,000 with a quarter receiving over $5,122. For the few candidates who advanced from a top-two primary and faced the Democratic incumbent in the general election, the median was $400 and upper quartile $1,570.[401] As with individual political donors, it is logical to think that professional PACs would give their money more readily to progressive insurgents with the greatest chances of winning, seen above with candidates' greatest fundraising in open Democratic and open or Republican-held swing seats, since they want to support winners. Of course, since accepting PAC money is broadly taboo in the movement, another factor could be that candidates in these districts understand themselves to have a genuine possibility of winning, which makes them more receptive to taking

[399] Walter J. Stone and Alan I. Abramowitz, "Ideology, Electability, and Candidate Choice," in *The Life of the Parties: Activists in Presidential Politics*, ed. Ronald B. Rapoport, Alan I. Abramowitz, and John McGlennon (Louisville: University Press of Kentucky, 1986), 75–96.
[400] Progressive insurgent interviews.
[401] Data from the Federal Election Commission; N = 189.

traditional forms of political money.

Insurgents found that as progressive and working-class candidates they were systematically at a disadvantage with regard to attracting the support of people with the means to give large amounts to campaigns and having such personal connections. Challengers remarked that fundraising is very difficult for candidates running to "balance the scales of equality."[402]

But the lack of personal wealth and connections to people who did have large financial resources was an even bigger obstacle—in traditional campaigns, consultants commonly tell people not to run if they cannot start by raising several hundred thousand dollars from their personal network. Many insurgents did not have a such an affluent network. An insurgent observed, "I realized retrospectively that there's a path that for people who are connected to money, people who are expected to run, people who are expected to win."[403] Kina Collins, a 2020 insurgent in IL-07, elaborated that fundraising pressures "limit the ability for working class people to run. I don't have a network of millionaires and billionaires who I can call on. The people who I'm calling on are activists and organizers and blue-collar workers. They can give $25 here or $50 here at the most. You should be funded by the people."[404] Sarah Smith, a 2018 challenger in WA-09, said, "I always took stewardship of donations seriously. We weren't taking any corporate money, so it was not lost on me that some people are using their last $5 for the week to donate to my campaign."[405] Still another echoed the sentiment, "Other people were like, 'Oh there's people with money.' I'm like, 'Where the hell are they? Because everyone I talked with doesn't have any.' It was terrible. It felt disgusting to ask people to donate."[406] While a few insurgents relied heavily

[402] Progressive insurgent interviews.
[403] Tahirah Amatul Wadud, interviewed by Amelia Malpas, September 23, 2021.
[404] Kina Collins, interviewed by Amelia Malpas, September 23, 2021.
[405] Sarah Smith, interviewed by Amelia Malpas, June 29, 2021.
[406] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021.

on family and friends for donations, they were a small minority.[407]

Progressive insurgents' backgrounds, beyond not personally knowing many wealthy people, impacted their comfort with asking strangers to spend money on their campaigns. Women candidates, especially women of color, also had to overcome gendered and/or racialized socialization that trained them to not ask for things or think they were worth other people's resources. The conclusion of many was that it is very difficult to run for Congress as a working-class American. Indeed, this reflects a broader problem in American politics: the rarity of working-class candidates, much less electorally-successful ones.[408] Working-class representatives have always comprised less than 2% of Congress, with profound implications for policy that affects the distribution of resources.[409] Several insurgents explicitly thought this could be partially remedied with publicly-financed congressional elections, which aligns with both their political preferences and personal needs. As it were, many insurgents were cross-pressured by the need to stay personally financially afloat without vast personal or familial wealth and being able to dedicate themselves to their campaign. For some, this meant maintaining their full-time job while working as a candidate—either for the entire duration of the campaign or for most of it—which hurt their ability to fundraise and run a viable campaign. Others took the plunge and left their jobs, often with severe personal economic consequences.[410] These financial, time, and other burdens that come with running for office are a critical part of why so few working-class Americans do, along with a lack of recruitment by party elites.[411]

Reflecting on their campaigns, insurgents understood the importance of fundraising and

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[407] Progressive insurgent interviews.

[408] Nicholas Carnes, *The Cash Ceiling: Why Only the Rich Run for Office—and What We Can Do about It* (Princeton: Princeton University Press, 2018).

[409] Carnes, *The Cash Ceiling*.

[410] Progressive insurgent interviews.

[411] Carnes, *The Cash Ceiling*.

how a different strategy, either for their individual campaign or the Progressive Insurgency as a whole, might be more conducive to electoral success. Many did not think, in retrospect, that their campaigns focused enough on fundraising. Others advocated revising the insurgency's rigid money principles.[412] Sarah Smith, a 2018 challenger in WA-09, laid out her case: "It is very difficult running on small-dollar only donations. I recommend the movement reevaluate taking money from unions and value-aligned organizations to build the financial capital necessary to be truly competitive."[413] Brianna Wu, a 2018 challenger in MA-08, currently runs a Super PAC, which can spend unlimited amounts of money indirectly on behalf of candidates, for progressive candidates with Cenk Uygur of the Young Turks—the independent political show that many insurgents credited with raising their campaign's profile—and a 2020 insurgent in CA-25.[414] She urged that candidates focus on the ends over the means, saying, "Progressives are never going to win until we get damn serious about fundraising … The truth is we're playing at a disadvantage. We need more resources not fewer."[415]

External Constraints

Multiple Progressive Insurgents in the Same Race

> "The hardest part about my race was not that I was challenging
> Nancy Pelosi but that I was challenging other progressives," Agatha
> Bacelar, 2020 insurgent in CA-12.[416]

A handful of districts in 2018 and 2020 had multiple progressive insurgents running in the same

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[412] Progressive insurgent interviews.
[413] Sarah Smith, interviewed by Amelia Malpas, June 29, 2021.
[414] David Duhalde, "Socialists and Super PACs," *Jacobin*, June 27, 2020, https://jacobinmag.com/2020/06/socialists-super-pacs-campaign-finance-justice-democrats. Controversially within the movement, Justice Democrats also flirted with a super PAC in the 2020 electoral cycle.
[415] Brianna Wu, interviewed by Amelia Malpas, August 9, 2021.
[416] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021.

race, which introduced new, contentious dynamics within the insurgency.[417] Insurgents primarying

Democratic incumbents—and contending with another challenger—were more likely to speak of

"antagonistic" and hostile dynamics between the challengers than when there were two in another

type of district. Several reported that the other progressive challenger attacked them more than the

incumbent. In majoritarian districts, multiple challengers in the same race splits a district's

progressive vote, which is likely already a minority against the incumbent: the presence of multiple

challengers in the same race serves as incumbent protection. These were the only districts where

multiple challengers exerted a significant negative effect on insurgents' vote share. In contrast,

insurgents in the other types of districts with multiple progressive insurgents spoke of the

"camaraderie" between their campaigns. "We actually really liked each other," said one.[418] While

multiple insurgents in these races still splits the vote, whether or not this destroys the chances of a

progressive winning the primary depends on how many other candidates are in the race and their

popularity. That is, voters in a Democratic primary in a Republican district with two progressive

challengers could still nominate one as the general election candidate. That the stakes of having

multiple challengers are much lower in these districts is likely the best explanation for the varying

degrees of campaign hostility that insurgents reported.[419]

Campaigning During Covid-19

> "The incumbent didn't know how to turn on Zoom," Adam
> Christensen, 2020 insurgent in FL-03.[420]

> "The campaign was pretty much over once covid hit," Anthony
> Clark, 2018 insurgent in IL-07.[421]

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[417] In the interviews, I asked relevant challengers about these dynamics.
[418] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.
[419] Progressive insurgent interviews.
[420] Adam Christensen, interviewed by Amelia Malpas, September 23, 2021.
[421] Anthony Clark, interviewed by Amelia Malpas, September 22, 2021.

Covid-19 upended traditional campaigning.[422] While two progressive insurgents said it was a net positive and a few experienced relative advantages vis-à-vis opponents, a large majority spoke of its devastating effects. One of the two insurgents who thought the pandemic helped their campaign explained that it was because of their strength with "digital infrastructure" relative to the Republican representative they faced in the general election and that because high schools and universities were virtual, their very young staff could spend more time on the campaign. The other insurgent who thought their campaign benefitted from covid-19 ran in one of the United States' geographically largest districts, so virtual campaigning helped them "consolidate resources."[423]

How did covid-19 negatively affect the other insurgents' campaigns? Nearly all cited shutting down field operations as the most harmful direct impact of covid on their campaign, which was previously their primary strategy as it requires low levels of financial resources. One insurgent said simply, "we lost our entire strategy when covid hit."[424] In this way, covid was more detrimental to challenger campaigns that could not afford to get the message out through any medium besides canvassing than incumbents' reelection campaigns where voters already had exposure to their name.[425] Very few campaigns continued any in-person canvassing. Most tried to pivot to virtual operations, such as getting volunteers on the same Zoom meeting to phonebank together or holding public Zoom events—sometimes with other progressive insurgents—to talk about the need for Medicare for All or how to file for unemployment or rental assistance. JD

[422] Progressive insurgent interviews; Barbara A. Trish, "From Recording Videos in a Closet to Zoom Meditating, 2020's Political Campaigns Adjust to the Pandemic," *The Conversation*, October 7, 2020, http://theconversation.com/from-recording-videos-in-a-closet-to-zoom-meditating-2020s-political-campaigns-adjust-to-the-pandemic-145788.
[423] Progressive insurgent interviews.
[424] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[425] Taylor, "A New Group of Leftist Primary Challengers Campaign Through Protests and the Coronavirus."

Scholten in IA-03 replaced canvassing with parking lot rallies in the campaign RV.[426] But the problem with both of these substitutions is that they drew in people who were already supporters of the campaign and did not allow for campaigns to have the same broad voter outreach that they would have through in-person canvassing. Further, candidates with young children, especially mothers, had an added burden as they helped their children with virtual school. To do so, Angelica Dueñas had to stop campaigning for over a month.[427]

Covid also changed campaigns' ability to fundraise. While many people campaigns called in the early months were shy for resources, the wealthy were not. Nick Rubando in OH-05 found that "rich people were just staying at home and didn't have anything to spend their money on. They're like, 'oh shit, I'll give you $500. I haven't gone out to dinner that all this month.' Rich people are just continuing to get richer off these disasters."[428] Several campaigns stopped fundraising for themselves entirely, switching over to raising and sending resources to local mutual aid projects. Or, instead of calling voters in the district to directly advertise the campaign, they would check in with people about their well-being and see if they could connect people with any resources they might need.[429]

Finally, many states rolled out vote-by-mail programs, which led voter turnout to increase nationwide. This threw off many challengers' calculations of their "win number"; while most still would have lost, a few, especially in swing and Republican districts, were close enough that had turnout been closer to what they anticipated based on past years, they might have won their primaries. Democrats, one insurgent hypothesized, were also punished by voters in the general

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[426] JD Scholten, interviewed by Amelia Malpas, September 13, 2021.
[427] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021; Progressive insurgent interviews.
[428] Nick Rubando, interviewed by Amelia Malpas, August 30, 2021.
[429] Progressive insurgent interviews; Taylor, "A New Group of Leftist Primary Challengers Campaign Through Protests and the Coronavirus."

election for their covid response, which may help explain why the party did worse than expected down ballot and why several progressive insurgents who made it to and came close to winning in the midterms 2018 did a few points worse in the 2020 election.[430]

Insurgents' Evaluations of Their Chances and What They Needed to Win

> "Running against the Speaker of the House as an immigrant with no property, I recognized that my odds were long," Shahid Buttar, 2018 and 2020 insurgent in CA-12.[431]

> "We were infinitely more prepared to lose than to win," Jen Perelman, 2020 insurgent in FL-23.[432]

Unsurprisingly, progressive insurgents' expectations of primary election victory vary by their district type, which Figure 18 shows.[433] As a whole, 47% of challengers answered with "3"—the middle expectation of primary victory—with 37% responding with a "4" or "5"—high expectation of victory—and 16% with a "1" or "2"—low expectation of victory. Within this, the type of district that the insurgent ran in had a large influence. All challengers in Republican districts, open or Republican-held swing seats, or open Democratic seats responded with a "3" or higher. In contrast, while the greatest number of challengers to Democratic incumbents also said "3," more ranked their chances as lower than their peers in the other districts.[434] These findings broadly correspond with others that show that challengers tend to overestimate their chances of winning.[435]

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[430] Progressive insurgent interviews.
[431] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[432] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[433] To understand how the progressive insurgents understood their chances of victory as candidates, I surveyed them, "On a scale of 1-5, how much did you expect to win your primary election?" where 1 is "not at all" and 5 is "very much so."
[434] Survey data; N = 30.
[435] Jacobson and Carson, *The Politics of Congressional Elections*.
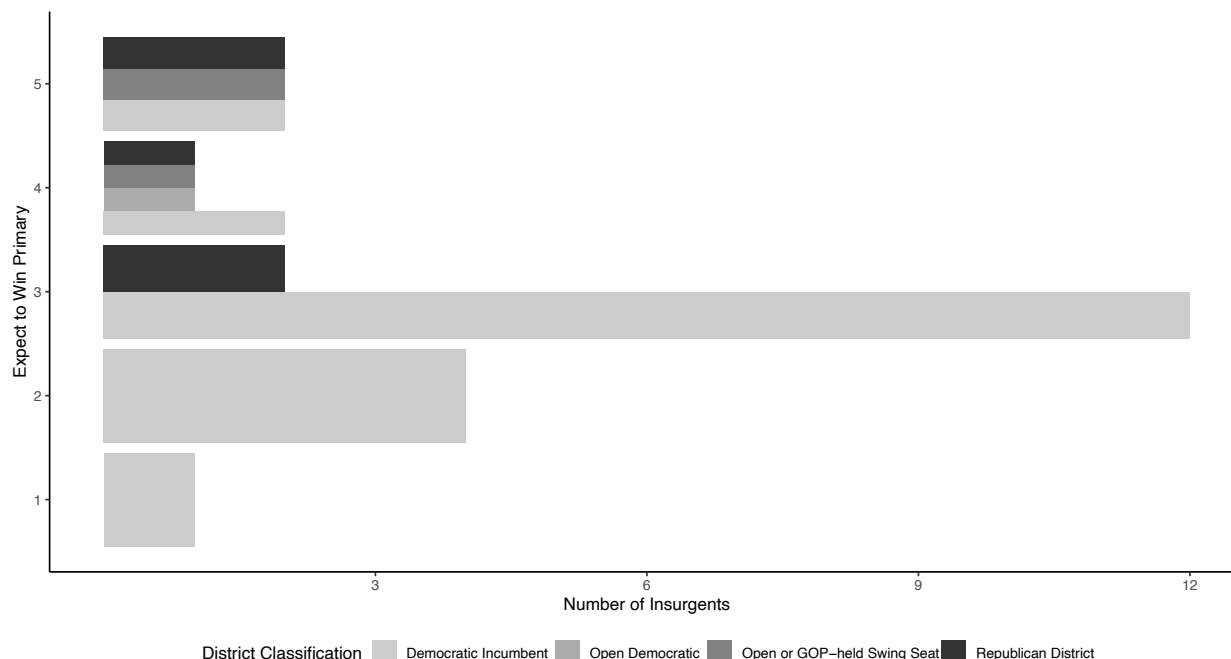
Figure 18: How much did you expect to win your primary election? (1 = not at all, 5 = very much so). Survey data. N = 30.

Progressive insurgents had different diagnoses of what they would have needed to win.[436]

By far their most common answer was increased fundraising. Rachel Ventura, a 2020 challenger

in IL-11 who got over 40% of the primary vote against a Democratic incumbent, said simply, "if

we had raised more money, I definitely think we would have won."[437] Liam O'Mara, who won the

Democratic primary in a Republican district, thought that "realistically, you could win a district

like ours with half or $1 million."[438] For Robert Emmons Jr., a 2020 insurgent in IL-01, "it all

comes down to the ability to raise the money necessary to reach the voters."[439] Several explicitly

named their lack of paid, professional staff and that they had to work full time outside of their

campaign as major obstacles to victory that were a direct result of their poor fundraising.[440]

Covid-19 in general and its devastating impact on field operations in particular was another

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[436] In the interviews, I asked insurgents what they personally or the broader movement would need to win.
[437] Rachel Ventura, interviewed by Amelia Malpas, August 2, 2021.
[438] Liam O'Mara, interviewed by Amelia Malpas, August 3, 2021.
[439] Robert Emmons Jr., interviewed by Amelia Malpas, July 29, 2021.
[440] Progressive insurgent interviews.

major impediment to winning for many insurgents. Campaigns lost valuable time and voter connections from the pandemic. Virtual organizing and get-out-the-vote efforts, further, were no replacement for the in-person equivalents.[441] In addition to covid, a few 2020 challengers believed the racial justice protests catalyzed by George Floyd's murder to affect their campaigns. Albert Lee, a candidate in OR-03 who is Black, said, "The whole George Floyd incident happened in May. I'm not wishing ill or death on anybody, but if that incident happened earlier, I think it would have been a turning point within our race as well" since the Oregon congressional delegation is so white.[442] A white insurgent who faced a Black moderate in an open Democratic district in the summer of 2020 also thought that this climate impacted their chances of winning.[443]

Candidates frequently blamed gerrymandering for their loss; several received more votes than past Democrats but without different district lines, they doubted they could have won. While these were primarily challengers in swing or Republican districts concerned with general election losses, a few running against Democratic incumbents also brought up gerrymandering along economic and racial lines. One attributed their loss to not targeting the affluent parts of their district adequately in their field game.[444]

Challengers also brought up not buying ads and not receiving mainstream and local media coverage as impeding their ability to win, because of how it limited their name recognition among voters. Two candidates who did receive media coverage, however, felt stifled by media narratives of "electability" that took aim at their ideology or identity and reproduce patterns of who in America holds political power.[445] Fayrouz Saad, a 2018 challenger in MI-11, explained that

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[441] Progressive insurgent interviews; Taylor, "A New Group of Leftist Primary Challengers Campaign Through Protests and the Coronavirus."
[442] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[443] Progressive insurgent interviews.
[444] Progressive insurgent interviews.
[445] Regina Bateson, "Strategic Discrimination," *Perspectives on Politics* 18, no. 4 (2020): 1068–87.

Democratic elites and voters in her district "just needed their safe white woman."[446]

Quite a few attributed their loss to Democratic pushback and the DCCC blacklist of firms that provide campaign infrastructure and services. One specifically regretted interacting with the local party, saying that they believed that Ocasio-Cortez's victory was in part from how little interaction she had with the party, while another wished that they had won over local party groups. Liuba Grechen Shirley, who won her primary in a swing district, said that she would have won if "the Democratic Party had frankly done anything" for her general election campaign.[447] Every challenger from New Jersey mentioned the obstacles posed by the state's ballot structure and the Democratic "party line" which local party officials prevented them from being on.[448] Critics allege that this essentially allows them to predetermine the primary outcome by controlling which candidates appear on the party line that confers a greater advantage to candidates on the line than incumbency. New Jersey challengers all said that a reformed ballot is what they would need to win, for which progressives in the state are suing.[449]

Most challengers communicated implicitly that they thought their races were winnable, if one or more of the above factors changed to be more favorable. Jen Perelman, a 2020 insurgent in FL-23, cautioned, "If you run again without changing the variables … and figuring out what pieces needs to be in place, you're not going to get a different result."[450] A few, however, did not think so. One challenger said, "I don't think I could have done anything more to win that race."[451] Another was frank, "I could never have won. And I didn't know that."[452]

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[446] Fayrouz Saad, interviewed by Amelia Malpas, September 29, 2021; Progressive insurgent interviews.
[447] Liuba Grechen Shirley, interviewed by Amelia Malpas, September 1, 2021.
[448] Progressive insurgent interviews.
[449] "Progressives File Suit to Eliminate the Party 'Line' on Ballots," *Insider NJ*, January 25, 2021, https://www.insidernj.com/progressives-file-suit-eliminate-party-line-ballots/.
[450] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[451] Fayrouz Saad, interviewed by Amelia Malpas, September 29, 2021.
[452] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.

Democratic Incumbents' Threat from and Response to Insurgent Primary Challenges

Incumbents' Sense of Threat

> "There was a lot of benefit to being underestimated," Angelica Dueñas, 2020 insurgent in CA-29.[453]

> "After AOC won in 2018, the Democratic establishment took insurgent candidates more seriously," Shaniyat Chowdhury, 2020 insurgent in NY-05.[454]

The actual and hypothetical threat to an incumbent's power that insurgents exert through their primary challenges is a key part of the power of insurgency, allowing them to influence politics even when they lose. Progressive insurgents generally perceived the Democratic incumbent they primaried to be threatened by their candidacy.[455] Only 5% rated the incumbents' threat level as a "5"—the highest—and only 10% said "1"—the lowest. Another 14% said "2" and 29% "3." In contrast, 43% said "4"—the second highest.[456] Importantly, insurgents who ran only in 2018 or in both years only answered between 1-3. Challengers who ran in 2020 had a wider range of ratings, but they are concentrated in higher levels (3-5). It makes sense that challengers in 2020 reported that the incumbents they primaried took their campaigns more seriously than those who ran in 2018, given that before Ocasio-Cortez and Pressley defeated Democratic incumbents in 2018, few thought that it could be done. Of course, many insurgents brought up Ocasio-Cortez's victory as being critical to the incumbents' fear of their challenge. Challengers with primaries in 2018 after hers noticed an immediate difference in how seriously the incumbent took them, newly viewing

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[453] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021.
[454] Shaniyat Chowdhury, interviewed by Amelia Malpas, August 24, 2021.
[455] As part of my investigation into how threatened Democratic incumbents are by insurgent primary challenges and how they responded to them, I asked relevant challengers to rate, on a scale of 1-5, how seriously the Democratic incumbent took their candidacy.
[456] Survey data; N = 21.

them as an "actual challenger."[457]

Many Democratic incumbents initially did not take the insurgent challenge seriously but did so by the end of the primary campaign. Morgan Harper, a 2020 insurgent in OH-03, explained, "at first our campaign wasn't taken at all seriously by the party. There was a former chair of the state party who tweeted out on the first days, 'she's going to get 1% of the vote, this is going nowhere.' After the first quarter, we raised more than the incumbent," which made the incumbent and local party take Harper's challenge seriously for the duration of the campaign.[458] A few other challengers believed that their fundraising was what made the incumbent take their challenge more seriously. One noticed the change after the George Floyd protests began. Others did not have a singular event that changed the incumbent's sense of the threat but suspected that the incumbent commissioned internal polling that showed a tighter race than they anticipated.[459]

Opposite of challengers, incumbents' fundraising and the percent of the vote they earn are negatively correlated, making their higher fundraising indicative of how threatened they feel.[460] Figure 19 shows the distribution of the percent change in Democratic incumbents' fundraising in the year they faced an insurgent challenge from the average of their two previous primary elections and the one election prior.

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[457] Progressive insurgent interviews.
[458] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.
[459] Progressive insurgent interviews.
[460] Jacobson and Carson, *The Politics of Congressional Elections*.
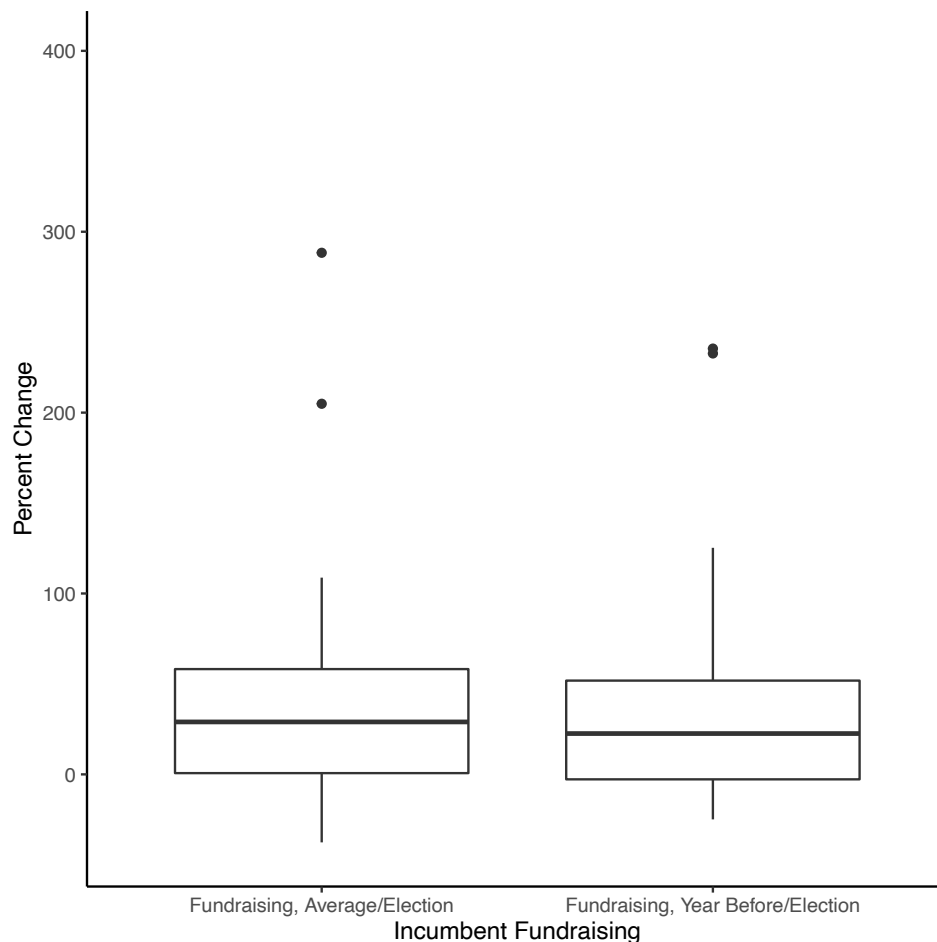
Figure 19: Challenged Democratic incumbents' change in primary election fundraising. Data from the Federal Election Commission. N = 59. Some outliers not shown.

Challenged incumbents' average increase in fundraising from their previous primary was 53%, over twice as much as all incumbents' approximate average 20% increase each primary election between 2010-2016.[461] Incumbents increased their fundraising in the primary when they were challenged by an average of 144% compared to the average of their two prior primary elections. Figure 19, however, shows the distribution, which is less distorted than the average. For the comparison to the prior year, the minimum percent change was -53% and the maximum was 1,261%. Within this, a quarter were below -4%, half were below 21%—which is very close to the

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[461] Albert, "Trends in Campaign Financing, 1980-2016." Approximate value.

average increase for incumbents in the early 2010s. Above this, a quarter of incumbents increased their fundraising from the prior year by more than 56%. The percent increase in fundraising for the year that insurgents challenged incumbents was generally greater from the average of their prior two primary elections. The minimum was -41% and maximum 6,579%. A quarter's fundraising increased less than by 0.187% and half's increased by less than 29%. On the upper side, a quarter's increased by more than 60%.[462] While an appreciable minority of Democratic incumbents fundraised less than they had for the previous one or two primary elections, about half of them raised significantly more, evidence that they were in fact threatened by the insurgent's primary challenge. Shaniyat Chowdhury, 2020 challenger in NY-05, observed this pattern with the incumbent he challenged who "spent over $2 million to make sure my insurgent campaign didn't win. He's never spent on a race like that in his career before."[463] A few others also brought this specific phenomenon up as proof that the incumbent took their campaign seriously.

The four Democratic incumbents in top-two primary states who faced a progressive insurgent in their general election were also threatened. In 2018, Representative Adam Smith faced insurgent Sarah Smith in WA-09; in 2020, Speaker of the House Nancy Pelosi faced insurgent Shahid Buttar in CA-12, Representative Tony Cárdenas faced insurgent Angelica Dueñas in CA-29, and Representative Jimmy Gomez faced insurgent David Kim in CA-34.[464] Compared to the prior general election, half increased their fundraising by more than 72%, with a minimum of 10% less and a maximum of 389% more. Compared to the two previous general elections, half increased

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[462]Data from the Federal Election Commission; N = 60 (67 – all instances of multiple progressive challengers running against the same incumbent so I did not double count them).

[463] Shaniyat Chowdhury, interviewed by Amelia Malpas, August 24, 2021.

[464] Daniel Marans, "House Democrats In Safe Seats Ask DCCC Donors For Help Fending Off Progressive Challenges," *HuffPost*, April 15, 2021, https://www.huffpost.com/entry/house-democrats-dccc-donors-progressive-challengers_n_6078a100e4b058846f21a766?ncid=engmodushpmg00000004. Following this election, Representative Gomez would go on to plead for party support beating back progressive insurgents, telling the DCCC that he was in a tough race.

by over 64%, with a minimum of -14% and a maximum of 425%.[465] This shows that broadly, these incumbents were threatened by the insurgent challenge. Most notable is Pelosi, who is responsible for the two largest increases. In 2020, for the first time since she was elected to Congress in 1988, she faced a Democrat in the general election. For the Speaker of the House in a D+37 district that has reliably elected her for over three decades, this roughly 400% increase in fundraising is astounding. There was nothing different for her in the 2020 election except that she faced a progressive insurgent Democrat rather than a Republican in the general election. She likely did not think that she would lose reelection, but she clearly felt threatened by the possibility that it could happen.

Beyond significantly increasing their fundraising and spending, incumbents indicated—to insurgents, at least—that they took the challenge seriously through greater campaign activity. For some, this meant canvassing parts of the district for the first time in years or sending a deluge of literature by snail-mail and text. The incumbent that Zina Spezakis challenged in NJ-09 in 2020 did this, since he "didn't want another AOC happening in this district."[466] Rachel Ventura, who got over 40% of the primary vote in IL-11 in 2020, said that toward the end of the campaign, the incumbent replaced his campaign team and adopted a new strategy, which she suspected came after internal polling showed her to be a real contender.[467] After that, the incumbent personally showed up to endorsement meetings with major local newspapers and made a more impassioned case for his reelection.[468]

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[465] Data from the Federal Election Commission; N = 4.
[466] Zina Spezakis, interviewed by Amelia Malpas, August 6, 2021.
[467] Rachel Ventura, interviewed by Amelia Malpas, August 2, 2021.
[468] Progressive insurgent interviews.

Incumbents' Response to the Insurgent Threat

> "Corporate Democrats, the establishment of the Democratic Party, have two main weapons: one is ton of cash, the other one is that they have no problem using character assassination … I'm sure it is a nationally-approved tactic" Jason Call, 2020 candidate in WA-02.[469]

> "Internally he took me seriously, externally he did not engage at all," Jason Call, 2020 insurgent in WA-02.[470]

> "When I look at the behavior of the Congresswoman now, whether it's performative or not, she's making an attempt to appear more on the left," Mel Gagarin, 2020 insurgent in NY-06.[471]

How did Democratic incumbents react to this threat and interact with the insurgents? Few incumbents debated the insurgent, at least frequently.[472] Fifty-seven percent of insurgents never engaged in a debate with the incumbent, 27% did many times, and 17% did once.[473] Most never engaged in a debate or other public demonstration of policy differences, but a quarter did more than once. Agatha Bacelar, a 2020 candidate in CA-12, observed these dynamics between the insurgent who advanced from their primary, Shahid Buttar, and the incumbent Nancy Pelosi who "didn't seem fazed at all and wasn't going to engage on the local level with a challenge."[474]

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[469] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[470] Jason Call, interviewed by Amelia Malpas, August 10, 2021.
[471] Mel Gagarin, interviewed by Amelia Malpas, September 17, 2021.
[472] In the surveys, I also asked insurgents, "Did you and the incumbent engage in a debate or any other public discussion and demonstration of policy differences?" where they could respond with either "no, never," "yes, once," or "yes, many times." For challengers running in seats without a Democratic incumbent, I asked them to answer with regard to other Democrats in the primary.
[473] Survey data; N = 30.
[474] Agatha Bacelar, interviewed by Amelia Malpas, August 2, 2021.
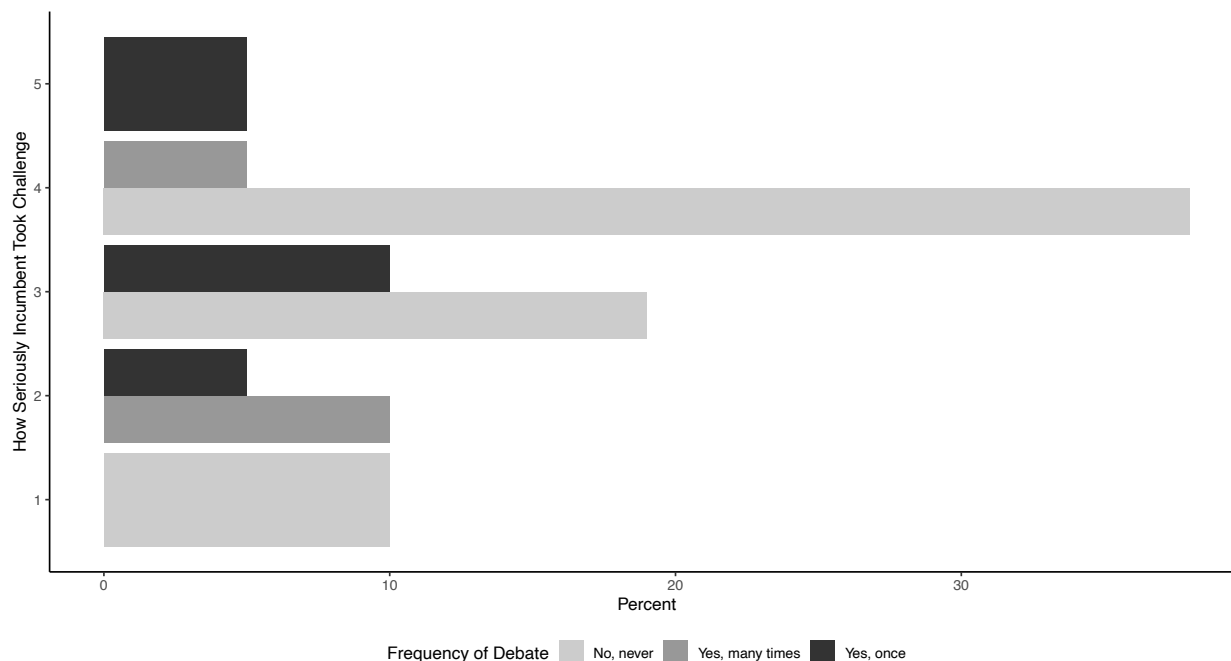
Figure 20: How seriously incumbent took challenge by frequency of debate. Survey data. N = 21.

Figure 20 shows challengers' reports of how seriously the incumbent took their campaign with how often they debated to estimate how the incumbent's sense of threat influenced their behavior. The two challengers who said the incumbent did not take their campaign seriously at all did not debate the incumbent, and the one challenger who said that the incumbent took their campaign most seriously had one debate. But for all the challengers who perceived middle levels of incumbent threat, the results are mixed. All three challengers who ranked the incumbent's threat level as the second lowest reported engaging in a debate: one did only once and two did more than that. Of the six who reported middle levels, four never debated and two did once. In contrast, eight of the nine challengers who rated the incumbent as taking them quite seriously ("4") did not debate the incumbent and the remaining one did many times. These results defy easy explanation. On the one hand, incumbents could be drawn to debate their challenger if they fear they may successfully primary them. On the other, incumbents who feel most threatened could decide not to debate because they fear that the challenger has everything to win from such an interchange and they have

everything to lose. The results seem to indicate that incumbents did a little bit of both, with a heavy bias toward not debating.[475]

Many incumbents simply ignored the progressive insurgent's primary challenge and were "silent."[476] The two logical explanations for not debating are consistent with the reasons incumbents ignore the insurgent challenge. If incumbents see the insurgent challenge as totally futile, it would be illogical for them to respond to it. Incumbents have little to win from alerting politically-engaged constituents that there is another Democratic candidate with a different policy platform that they could vote for. This latter reasoning, especially among incumbents challenged in 2020, however, seems to be more relevant given what their fundraising indicates about their sense of threat. Albert Lee, a 2020 challenger in OR-03, assumed that the incumbent's "strategists told him it would be best to try to ignore our campaign as much as possible because any kind of attention would elevate or help us."[477] Many others articulated the same view. The incumbent that Jason Call challenged in WA-02 in 2020 never acknowledged his campaign throughout the primary. Call reasoned that "if he acknowledged anywhere that he had a challenger, he would have to start talking about differentiating himself from me. He doesn't want to do that because for 20 years, all he's had to say is that he isn't a Republican … They have nothing to gain by engaging with us."[478] Once another insurgent advanced past the top-two primary, the incumbent completely stopped acknowledging or commenting on their campaign, which he had done prior to the primary.

A less common response from incumbent Democrats and/or the local party was to orchestrate smear campaigns against the progressive insurgent. This was the most severe Democratic reaction—indicative that they took the challenge very seriously—which happens often

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[475] Survey data; N = 21.
[476] Progressive insurgent interviews.
[477] Albert Lee, interviewed by Amelia Malpas, August 25, 2021.
[478] Jason Call, interviewed by Amelia Malpas, August 10, 2021.

enough that a challenger called it part of the incumbent "playbook." Democrats' character assassinations frequently relied on racist or homophobic tropes.[479] The party's use of these tactics peaked with cases like the manufactured allegations of student sexual harassment against Alex Morse, who challenged Representative Richard Neal in MA-01 in 2020, but it used milder versions against many other candidates. Candidates brought up their own race as an example and given the timing of the interviews, many mentioned Nina Turner's special election in OH-11 in 2021 as the latest instance. In his second challenge in CA-12 once he had advanced from the top-two primary, Shahid Buttar faced allegations of a sexual harassment from former staff. He said, "I've experienced as a congressional candidate the worst example of white supremacy I've ever encountered. I say that as an immigrant, a brown-skinned immigrant Muslim who grew up in rural Missouri … I've been mugged by police. Never have I encountered anything like what I did at the hands of San Francisco journalists and the Democratic Party last year."[480] As unfortunate for the individuals involved as this is, it shows that incumbents and local party operatives rarely tried to discredit insurgents through their policy. Instead, they were discrediting insurgents through weaponizing and exploiting issues that progressive voters care about, like sexual harassment, to assassinate the candidate's character, which they may perceive to capture local or national media attention and voter interest more than policy disputes.[481]

Jen Perelman, a 2020 insurgent in FL-23, who was outwardly ignored but internally taken seriously by the incumbent and local party, had astute observations on why party officials would ignore the insurgent or launch a full-scale smear campaign. She explained,

> The difference between how someone like me was treated and someone like Nina [Turner] was treated in a primary is that when Nina entered that race, she was already a threat. They knew who she was, she had name recognition, she had power, and they were scared. When

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[479] Progressive insurgent interviews.
[480] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[481] Progressive insurgent interviews; Bawn et al., "A Theory of Political Parties."

they're scared they go balls to the wall. If you are unknown politically, they won't acknowledge your existence, because they figure if they don't bring it up, no one will know there's a campaign … Usually when they start calling in endorsements, they're starting to get desperate. For example, had they gotten to the point in Nina's election where Obama came out and had endorsed Shontel Brown, that's their last act. Had they not gotten the numbers they wanted to towards the end, they would have had to do that.[482]

This may not be universally true, but many incumbents did switch from ignoring a challenger to smearing them at critical moments when it seemed like the insurgent might prevail.[483]

A few incumbents responded to their 2020 challenges by emphasizing their closeness with Representative Alexandria Ocasio-Cortez and the other elected insurgents in the "Squad." Stevens Orozco, a 2020 insurgent in TX-23, said that during the primary the incumbent was "very close with her colleagues AOC, Ilhan Omar, all them. She was name-dropping in her conversations."[484] The Democrat, Representative Jimmy Gomez, that David Kim challenged in CA-34 in 2020 also did this (he was one of the non-insurgent Democrats highly involved in Representative Cori Bush's eviction moratorium protest). Kim recalled, "Ever since I ran, if you examine his social media, he shoved himself on the Squad. He takes pictures with them, he tweets them now, he's trying to be best buddies with Cori Bush. He did that before with Ayanna Pressley when we started our campaign. I get the whole lip service and trying to align himself in that way. But I still haven't seen the real action taking place."[485] Incumbents' final common response to an insurgent challenge was to coopt their policy, rhetorically if not sincerely. Rather than broadly attacking insurgent policy as unfeasible or a pipedream—although that still does happen on occasion—incumbents aimed to neutralize the threat the progressive insurgent posed to their institutional power through coopting their policy.

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[482] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[483] Progressive insurgent interviews.
[484] Stevens Orozco, interviewed by Amelia Malpas, August 17, 2021.
[485] David Kim, interviewed by Amelia Malpas, September 12, 2021.

Conclusion

This chapter has examined progressive insurgents' electoral performance, drawing on interview and survey evidence as well as electoral, financial, and other data pertaining to the insurgents, the incumbents, and the districts. It argues that the institutional and electoral strength of the Democratic Party in the district that insurgents run in greatly influences what factors matter most for their primary vote share, their access to vital campaign resources, and how well they do in their elections. It finds that most significant factors related to the quality of the insurgent rather than their district or the incumbent they are challenging. The Progressive Insurgency fielded more candidates in Democratic districts in 2020, with lower rates of primary election success but higher rates of general election success than in 2018. Many of these incumbents felt threatened by the challenge even if they publicly ignored it. Insurgents primarying Democratic incumbents raised the least money on average but the highest amount of it comes from within their district. Most of the movement took principled stances on what kinds of funding they accept. Finally, different core insurgent organizations offered different kinds of campaign resources and aided insurgents' primary vote by different degrees. In sum, progressive insurgents' electoral fortunes are deeply influenced by the type of district they run in—as is the nature of their impact on the Democratic Party, as the next chapter explores in depth.

Chapter 4

Punching Above Their Weight:

Insurgents' Impact on the Democratic Party's Policy

Introduction

On November 12, 2018, two incoming members of Congress left their official orientation at the Capitol to go to a meeting of young climate activists. The representatives-elect were Rashida Tlaib of Michigan's 13th congressional district and Alexandria Ocasio-Cortez of New York's 14th. The activists were from Sunrise, an assertive new organization part of the movement for climate justice. With her surprising primary victory earlier that year, Ocasio-Cortez had elevated the Green New Deal, Sunrise's signature policy proposal to mitigate climate change and create a fair economy, from wonkish obscurity to national prominence. The next November day, Ocasio-Cortez joined Sunrise organizers at a sit-in at the office of soon-to-be Speaker of the House Nancy Pelosi to protest her omission of climate change as one of the incoming Democratic Congress's priorities. Their protest and Ocasio-Cortez's presence caused quite the stir. And, it is worth underscoring, all of this occurred before Ocasio-Cortez and Tlaib took their oaths of office as some of the first progressive insurgents to serve in the House of Representatives.[486]

Two and half years later in June 2021, Ocasio-Cortez and first-term insurgent Representatives Cori Bush and Jamaal Bowman joined Sunrise's protest outside the White House

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[486] Andrew Marantz, "The Youth Movement Trying to Revolutionize Climate Politics," *The New Yorker*, February 28, 2022, https://www.newyorker.com/magazine/2022/03/07/the-youth-movement-trying-to-revolutionize-climate-politics; Grim, *We've Got People*; Engler and Engler, "Why the Left Sees an Opening for a 'Realignment' in U.S. Politics."

over the months-old Biden administration's lack of climate action.[487] Between these two Sunrise

protests, Democratic legislators and presidential aspirants increasingly supported the Green New

Deal, Republicans demonized it, the American public consistently approved of it in polls, and, as

activists and progressive insurgents noted, the United States' multiplying climate change-induced

catastrophes gave it new relevance.[488] The policy idea rose with remarkable speed—alongside the

Progressive Insurgency in the House of Representatives.

Most progressive insurgents lose their elections. Yet both winning and losing insurgents

influence the policy of Democrats who fear the success of their primary challenge. The last chapter

ended with how Democratic incumbents react to insurgent challenges in the immediate. This

chapter continues with the Progressive Insurgency's impact on the national Democratic Party's

policy. I apply my theory of insurgent-driven party change to this case and aim to answer the

following questions: What is the Progressive Insurgency's impact on the Democratic Party's

policy conversation? How many and which congressional Democrats are cosponsoring elected

insurgents' proposed bills? What is their influence on Democrats' passed policy? How does being

challenged by an insurgent change incumbents' communications about and cosponsorship of

insurgent policies? What are the insurgent ideas in President Biden's Build Back Better bill and

how did they evolve along with the bill's prospects of passing? How do insurgents understand

their influence on the party's policy?

In this chapter, I argue that the Progressive Insurgency's greatest impact on the Democratic

Party is in its policy conversation and proposed policy rather than its passed policy. These

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[487] Alexander Sammon, "How Joe Biden Defanged the Left," *The American Prospect*, July 26, 2021, https://prospect.org/api/content/121374ac-ebd6-11eb-b1e8-1244d5f7c7c6/.

[488] Ruairí Arrieta-Kenna, "When the Unstoppable Activists Met Their Match," *Politico*, November 5, 2021, https://www.politico.com/news/magazine/2021/11/05/sunrise-movement-manchin-climate-activism-democratic-washington-518558.Arrieta-Kenna.

dynamics are exemplified by the evolution of insurgent ideas in subsequent versions of Biden's Build Back Better agenda, which declined along with the bill's prospects. While insurgents' challenges have incentivized Democrats to coopt some of their principles and priorities, the Democratic Party's recently passed legislation reflects insurgents' indirect influence pulling the party leftward more than their direct leverage over the policy.

Specifically, I find that Democrats issue very few tweets about the Progressive Insurgency's three key policies—Medicare for All, the Green New Deal, and student debt cancelation—but nearly all are endorsements. They issue more press releases about these policies, a majority of which are also endorsements. Democrats began communicating in earnest about first Medicare for All, then the Green New Deal, and then student debt cancelation—sometimes in accordance with related crises, sometimes not. Elected insurgents have introduced varying numbers of bills in Congress, the median number of cosponsors of which is six. Over 90% of the total members, including Republicans, of the 116th and 117th Congresses have cosponsored at least one insurgent bill. Surprisingly, a quarter of insurgent bills have at least one Republican cosponsor and unsurprisingly, the most frequent cosponsors of insurgent bills are prominent progressive Democrats. While not every cosponsor of Medicare for All or the Green New Deal communicated about their support, nearly every Democrat who communicated about their support also cosponsored the bills. Most elected insurgent amendments passed the House. Democrats' passed American Rescue Plan shows insurgents' indirect influence on pulling the party left rather than their specific objectives or scale of policy design.

Being challenged by an insurgent has a greater impact on the number of incumbents' communications about the three insurgent policies than the number of insurgent bills they cosponsor. Insurgent primary challenges led incumbents to broadly increase their communications

about insurgent policies and substantially increase the proportion of insurgent bills they cosponsor. A majority of challenged incumbents had at least one instance of coopting an insurgent policy or shifting their stance on an issue toward the insurgent's. The principles and priorities of the Green New Deal and student debt cancelation have made greater impact on the Biden-Sanders Unity Task Force policy recommendations and President Biden's policy proposals in his first address to a joint session of Congress than Medicare for All. This high level of insurgent influence on Democratic proposed policy declined in the subsequent $3.5 and $1.75 trillion versions of Build Back Better, before it died altogether. While losing insurgents understand their political movement to be impacting the Democratic Party's policy, they see Democrats' adoption as too slow and too faint of an echo of their policies to adequately meet the present moment.

Past research generally shows minimal of effects of ideological challenges on incumbents' roll-call votes and changes in their DW-NOMINATE scores.[489] Looking at the effect not only on challenged incumbents but those who fear a challenge (in contrast to these narrow measurements), Richard Barton finds that they attract significantly fewer bipartisan cosponsors as they sponsor more ideologically-pure policy in response to the challenge.[490] This chapter's findings also show varying degrees of insurgent direct and indirect influence on the incumbents they challenge and on the Democratic Party as a whole, as not only challenged but all members respond to both the threat of insurgency and the party's changing policy dynamics.

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[489] E.g., Boatright, *Getting Primaried*; Robert G. Boatright, "The Consequences of Primary Challenges to Incumbents, 1970-2008," *Midwest Political Science Association*, 2010, http://www2.clarku.edu/departments/politicalscience/pdfs/boatright_MPSA2010.pdf. Further, Caitlin E. Jewitt and Sarah A. Treul, "Ideological Primary Competition and Congressional Behavior," *Congress & the Presidency* 46, no. 3 (2019): 471–94 find that ideological challenges make members of Congress in the majority party vote with the party leadership less, while Chase B. Meyer, "Getting 'Primaried' in the Senate: Primary Challengers and the Roll-Call Voting Behavior of Sitting Senators," *Congress & the Presidency* (2021): 1–22 finds that senators who faced such a challenge vote with their party leadership more.

[490] Barton, "The Primary Threat" contends that roll-call voting occurs too late in the legislative process, and party leaders have too much control over it, for it to be indicative of the impact of ideological challenges on incumbents.

This chapter proceeds as follows. First, it applies my theory of insurgent-driven party change to the case of the Progressive Insurgency within the Democratic Party and details the methods. It then examines, in turn, the insurgency's impact on the national party's policy conversation, proposed policy, and passed policy. Next, it explores the effects of an insurgent challenge on specific incumbents' communications about and cosponsorship of insurgent policies and traces the evolution of insurgent ideas in the Build Better Back from the Unity Task Force policy recommendations to the $1.75 trillion version of the bill. Finally, it concludes with insurgents' understanding of their movement's impact on Democrats' policy.

Trying to Change a Party: Theory and Methods

From the Conceptual to the Case: Mechanisms of Insurgent-Driven Party Change

In my introduction, I laid out a theoretical framework of insurgency and insurgent-driven party change. Here, I apply this theory to the case of the Progressive Insurgency within the Democratic Party to determine which theoretically-possible mechanisms of insurgent-driven party change this movement has activated. This should broadly predict the insurgency's level of impact on the Democratic Party.

Turnover—when a progressive insurgent defeats a Democratic incumbent and gains their institutional power—is the most clear-cut and dramatic form of insurgent-driven party change. The Progressive Insurgency has been moderately successful in changing the party via turnover. Notable cases of this within the Progressive Insurgency are Alexandria Ocasio-Cortez's defeat of Joe Crowley in New York's 14th congressional district in 2018 and Cori Bush's defeat of William Lacy Clay in Missouri's 1st congressional district in 2020. Ocasio-Cortez replaced a conservative Democrat in Crowley and made waves with her advocacy of the Green New Deal prior to being

sworn in to Congress. In contrast, Lacy Clay was a moderate-to-progressive Democrat. Bush's replacement of him brought new legislative urgency and tactics, which resulted several months into her first term in the Biden administration's extension of the pandemic eviction moratorium. Through this turnover, the ideological composition and therefore policy objectives of the congressional Democratic Party changed in favor of the insurgency. Crucially, turnover or the credible threat thereof is a prerequisite for all other mechanisms of insurgent driven-party change as incumbents largely privilege maintaining their seats in Congress over maintaining their same stance on a particular policy.[491]

Turnover is rare, making incumbents' cooptation of insurgent ideas the most common mechanism of insurgent-driven party change.[492] As Waleed Shahid, one of the co-founders of Justice Democrats put it, most party change happens because "not only does the party coopt you, but you coopt the party."[493] Insurgents' direct institutional contestation in a primary challenge or the threat thereof—the "stick" as it were—and softer resource incentives—the "carrot"—that accompany insurgent turnover drive incumbent cooptation. The Progressive Insurgency has been minorly-to-moderately successful at pressuring non-insurgents to coopt their policy in part or in whole, as its rate of turnover is moderate and its elected members' degree of combativeness with establishment members of the Democratic Party has been low. Its strongest show of force was over the strategy of passing Democrats' physical infrastructure and Build Back Better bills in the fall of the first year of the Biden administration. The Progressive Caucus, due in large part to the influx of progressive insurgents into it, briefly held its own and forced other factions of the party to adhere

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[491] Kamarck and Wallner, "Anticipating Trouble: Congressional Primaries and Incumbent Behavior."
[492] Indeed, Karol, *Party Position Change in American Politics* contends that small changes among individual members of the party is the dominant way parties change, not limited to insurgents.
[493] Leifer and Shahid, "The Realigners."

to its strategy to pass both bills together, before it lost its leverage.[494]

There are numerous examples of Democrats' cooptation of progressive insurgent ideas or favored policy. Among them are the multiple incumbents who proclaimed their support for the Green New Deal or Medicare for All in response to an insurgent challenge or similarly moved away from their past positions toward the insurgent's during the primary.[495] Higher profile examples include the pressure that a challenger put on Speaker of the House Nancy Pelosi over her lack of support of the Protecting the Right to Organize (PRO) Act; she eventually supported the labor bill and held a floor vote in the House for it.[496] Although he has yet to face a progressive insurgent challenge, Senate Majority Leader Chuck Schumer likely fears one given the Progressive Insurgency's victories and the broader resurgence of progressive politics in New York state. He has recently become one of the most outspoken proponents of canceling $50,000 of student loans per debtor, a major insurgent policy proposal. These politicians are far from the left wing of the Democratic Party, but they have coopted insurgent-supported policy to try to save their seat or preemptively discourage an insurgent challenge. The Democratic Party's policy cooptation would likely be greater if the insurgency had activated more of "carrot" electoral incentives that are theoretically possible.

The Progressive Insurgency's rise has elevated core insurgent organizations and peripheral insurgent-aligned advocacy groups and in the broader Democratic Party, which bolsters Democrats' policy cooptation of insurgent ideas. Sunrise, for instance, quickly rose to be an

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[494] Weisman, "Deeply Divided, House Democrats Battle Over Priorities and Politics"; Marans, "How Rep. Pramila Jayapal Turned The Progressive Caucus Into A Powerful Force"; Cochrane, "House Progressives Won't Vote for the Infrastructure Bill Unless the Senate Approves $3.5 Trillion in Other Spending.," 5; Romm, "Senate Democrats Adopt Sweeping $3.5 Trillion Budget That Opens the Door to Health, Education and Tax Reforms."

[495] Grim, *We've Got People*.

[496] Rachel M. Cohen, "Nancy Pelosi Is Sitting on a Bill That Would Strengthen Unions," *The Intercept*, December 2, 2019, https://theintercept.com/2019/12/02/nancy-pelosi-usmca-pro-act-unions/; "Pelosi Floor Speech in Support of the PRO Act," *Nancy Pelosi House.Gov*, February 6, 2020, https://pelosi.house.gov/news/press-releases/pelosi-floor-speech-in-support-of-the-pro-act.

influential group and have outsized influence in the party, in large part due to its close association with the insurgency. Sunrise can offer politically-aligned Democrats valuable electoral resources, such as its mobilized supporters that turn out for canvassing and phone-banking.[497] Incumbents may adjust their environmental policy to try to win Sunrise's endorsement in the hopes of preempting an insurgent primary challenge. The Progressive Insurgency has been decently successful here, although it varies by group and demand.

The Progressive Insurgency's least practically successful of the theoretically-possible avenues of insurgent-driven party change is to win seats where the Democratic Party usually loses. Many insurgents have espoused this theory of party change via cooptation as they run in safely Republican and Republican-leaning swing districts. Insurgents in these districts aimed to "demonstrate practically that running left in a red district is more effective" than running as a moderate Democrat.[498] Others phrased the theory as "what we need to do is push the red seats [rather than blue], because that's the only way you really change the game" and as "if we can show that we can win and that progressive ideals are what inspire people in [deeply Republican] Northwest Ohio, that's what is going to make the Democratic Party sit up and realize, 'Oh, shit, we shouldn't try to be centrist. We should try to really push the platform here.'"[499] This theory of Democratic Party change can also be traced to Bernie Sanders's 2016 insurgency: he ran in part to test his belief that progressive ideas could win in rural states that Democrats usually lost and where the party infrastructure was weak or nonexistent.[500]

But it has not come to fruition for the Progressive Insurgency in a significant enough way

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[497] Arrieta-Kenna, "When the Unstoppable Activists Met Their Match"; Karol, *Party Position Change in American Politics*; Bawn et al., "A Theory of Political Parties."
[498] Liam O'Mara, interviewed by Amelia Malpas, August 2, 2021; Progressive insurgent interviews.
[499] Liam O'Mara, interviewed by Amelia Malpas, August 2, 2021; Nick Rubando, Liam O'Mara, interviewed by Amelia Malpas, August 30, 2021.
[500] Sanders, *Our Revolution*.

for the mainstream of the Democratic Party to take notice. Now-Representatives Mike Levin and Katie Porter are the only insurgents to be elected from these districts; flipping the partisan control of the seat with their victory, both are from swing rather than Republican districts. While still losing, and therefore not providing the incentive for non-insurgents to adopt their platform, several 2020 insurgents in red districts did earn a higher absolute number (although not percentage due to higher turnout from mail-in ballots) of the vote than past Democrats. Others reported that their races were taken more seriously than prior Democrats' in the same district. For instance, Randy Bryce's viral announcement video for his race against then-Speaker of the House Paul Ryan prompted an immediate response from Ryan's office when they usually ignored competitors.[501]

But Democrats' cooptation would likely be much greater if progressive insurgents had flipped a substantial number of red seats that establishment Democrats had previously failed to win. If they had done so, more establishment Democrats would see progressive insurgents' electoral success—and policy—as a way to electorally reinvigorate the Democratic Party. Without this, party elites' views on the insurgency as an electoral utility or liability remain divided and largely dependent on their priors. The Progressive Insurgency has taken advantage of Democratic elites' disagreement about the future of the party, after sustained state-level losses during the Obama administration and Hillary Clinton's upset loss in the 2016 presidential election, to advance within it and make their case that their policy is a panacea. They have also harnessed popular and voter energies of disillusionment with the "politics as usual" of the fragile neoliberal order and desire for new politics to advance within the Democratic Party.[502]

The last incentive for host party cooptation of insurgent ideas is if the insurgency has

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[501] Randy Bryce, interviewed by Amelia Malpas, September 13, 2021.
[502] Gary Gerstle, "The Rise and Fall(?) Of America's Neoliberal Order," *Transactions of the Royal Historical Society* 28 (2018): 241–64.

successfully created or exposed a new issue constituency that the party tries to absorb to expand its electoral base.[503] It is hard to say definitively if the Progressive Insurgency has unleashed a critical group of voters who treat a Democratic candidate's support for Medicare for All or the Green New Deal as a litmus test for their support. It is fair to say that Democrats' support for these types of policies has become more of an electoral asset rather than a liability in primary elections. Opposite their hopes, Bernie Sanders's and the progressive insurgents' candidacies have not brought a sizeable number of previously-unengaged working-class voters or leftists whose conscience usually precludes them from voting for the party into its electorate.[504] Last, since none of the insurgents' transformational policies like student debt cancelation have become law, there has been no test of how these policies might materially root an expansion of the party's base. The Progressive Insurgency has not been successful in activating this route to Democratic Party change.

The objective of the Democratic Party's institutional backlash to the Progressive Insurgency is the same as their policy cooptation: they are trying to hinder or preempt insurgent challenges. The most famous example of the Democratic Party's backlash to 2018 insurgents' success is the Democratic Congressional Campaign Committee's (DCCC's) "blacklist" of firms that work with primary challengers to Democratic incumbents, which was concurrent with their cooptation of insurgent policy.[505] Although not explicitly directed at the progressive insurgents or coming out of thin air (it had long been an informal rule), the timing of this internal party policy change indicates that its objective was to prevent more insurgents from winning. The second,

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[503] Karol, *Party Position Change in American Politics*; Rapoport and Stone, *Three's a Crowd*.

[504] Sydney Ember and Nate Cohn, "Sanders Says He'll Attract a Wave of New Voters. It Hasn't Happened.," *The New York Times*, February 24, 2020, sec. U.S., https://www.nytimes.com/2020/02/24/us/politics/bernie-sanders-democratic-voters.html.

[505] Pritchard, "Opinion | A Policy to Quash the Women's Wave. From Democrats"; Mutnick, "House Democrats End Controversial Consultant Ban."

milder form of institutional backlash from the Democratic leadership was a new PAC founded by Representatives Hakeem Jeffries, Josh Gottheimer, and Terri Sewell to protect incumbents from primary challenges in safe seats.[506] One challenger described it as a "PAC to protect incumbents from people like me."[507] Anecdotally, which primary challengers the Democratic leadership is targeting with these forms of backlash became clear when Speaker of the House Nancy Pelosi endorsed Representative Joe Kennedy III's challenge from the right to insurgent-adjacent, Green New Deal sponsor, incumbent Senator Ed Markey.[508]

Neither a substantive policy or retaliatory rules change, performative proximity is when incumbents who are or fear being challenged perform their closeness to the elected insurgents without coopting their policy. One of the clearer examples of this is House Majority Leader Steny Hoyer's floor speech in February 2021 to condemn Representative Marjorie Taylor-Greene's social media post threatening three of the elected insurgents with an AR-15 firearm. He spoke of how Representatives Ilhan Omar and Rashida Talib are mothers while Alexandria Ocasio-Cortez is not but has "come to this body asking for more housing for people, for more health care for people, for more income for people. How awful. They're not 'the Squad,'" he orated, "They're Ilhan. They're Alexandria. They're Rashida. They are people. They are our colleagues."[509] On the one hand, Hoyer's speech was a mark of basic decency in standing up for his congressional

[506] Leigh Ann Caldwell, "House Democrats Launch PAC to Protect Incumbents from Attacks from Within," *NBC News*, June 26, 2021, https://www.nbcnews.com/politics/congress/house-democrats-launch-pac-protect-incumbents-attacks-within-n1272428; Kara Voght, "Exclusive: Top House Democrat Unveils Plan to Beat Back Progressive Rebellion," *Rolling Stone*, February 16, 2022, https://www.rollingstone.com/politics/politics-news/democratic-primaries-progressives-incumbents-hakeem-jeffries-1301186/.

[507] Hector Oseguera, interviewed by Amelia Malpas, July 8, 2021.

[508] Heather Caygle and Sarah Ferris, "Pelosi Endorses Kennedy over Markey in Contentious Primary," *Politico*, August 20, 2020, https://www.politico.com/news/2020/08/20/nancy-pelosi-endorses-joe-kennedy-senate-race-399447.

[509] "Hoyer Condemns Post of Greene Holding Gun next to Democratic Lawmakers," *NBC News,* February 4, 2021, https://www.nbcnews.com/video/hoyer-condemns-post-of-greene-holding-gun-next-to-democratic-lawmakers-100550725880.

colleagues; on the other, Hoyer faced a fairly strong progressive challenge in 2020 and has only cosponsored one (symbolic) insurgent-sponsored bill.[510] He does not support any of their signature policies. His proximity to them is performative. Two insurgents I interviewed mentioned how their challenge prompted the Democratic incumbent to emphasize their proximity to Ocasio-Cortez and other elected insurgents on social media or in speeches.[511] However, as these incumbents also cosponsored at least some—in one case, a lot—of the insurgents' bills in Congress, their emphasized proximity to the insurgents is not entirely performative.

These various substantive, retaliatory, and performative responses to the Progressive Insurgency from the Democratic Party demonstrate, as one insurgent put it, that "the overarching lesson is that they're noticing us," even if the insurgency has not been able to leverage all the theoretical routes of changing the party.[512] The Progressive Insurgency's extent of success in activating the substantive policy mechanisms of insurgent-driven party change, turnover and cooptation, suggests the scale of its policy impact on the party: moderate—not nonexistent but certainly not fully remade in its image.

Methods

I theorize that the power of insurgency lies not only in the twin institutional and ideological challenge to an incumbent facing a primary opponent but in how all incumbents in the party that fear such a challenge change their behavior to try to preempt it.[513] Because of this, I measure the impact of the Progressive Insurgency on both the national Democratic Party as a whole and on the specific incumbents that its candidates have challenged. Like the previous empirical chapters, this

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[510] Data from ProPublica, https://www.propublica.org/.
[511] Progressive insurgent interviews.
[512] Hector Oseguera, interviewed by Amelia Malpas, July 8, 2021.
[513] Barton, "The Primary Threat"; Boatright, *Getting Primaried*.

one makes use of mixed methods. The sources of data are more varied: insurgent interviews only make up a small amount of the evidence. Instead, the primary data are congressional tweets; congressional press releases and elected insurgents' introduced bills—including cosponsorship information—and amendments, which I took from ProPublica and Congress.gov; and the Biden-Sanders Unity Task Force policy recommendations, Biden's 2021 address to a joint session of Congress, the $3.5 and $1.75 trillion versions of Build Back Better, and the American Rescue Plan.

I employ qualitative as well as descriptive statistical analysis on tweets from the professional accounts of elected progressive insurgents and Bernie Sanders in the 116th-117th Congresses[514] and non-insurgent Democrats in the House and Senate in the 115-117th Congresses.[515] I only examine tweets from these politicians' professional accounts since I expect what they tweet from these accounts to be more reflective of their legislative priorities and more sincere than what they say on their personal accounts. I hand-coded the sentiment of tweets that reference one of three key insurgent policies, Medicare for All, the Green New Deal, or student debt cancelation, as "positive" (full endorsement of the policy), "neutral" (unclear or neutral stance on policy), or "negative" (criticism of the policy). I removed articles and other basic contentless words before completing the word frequency analysis on elected insurgents' tweets, looking at their most common single words and three-word phrases.

My methods are very similar for press releases from non-insurgent Democrats in the House

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[514] They sent out 36,911 tweets from their professional accounts between January 3, 2019, the commencement of the 116th Congress and the first terms of the first elected progressive insurgents, and December 27, 2021, a month after Build Back Better passed the House and nearly halfway through the 117th Congress.

[515] Between June 26, 2018, the day Alexandria Ocasio-Cortez won her primary election against incumbent Representative Joe Crowley, and December 27, 2021, a recess essentially midway through the 117th Congress, non-insurgent Democratic representatives and senators sent out 723,594 tweets via their professional accounts. Three members of Congress tweeted more than 3200 times (the most that Twitter will let people pull per account) between June 26, 2018 and November 19, 2021 when I pulled the first round of tweets, slightly distorting the actual number.

and the Senate.[516] I hand-coded policy sentiment in the press releases, this time adding to my categories of "positive," "neutral," and "negative," a "partial" distinction for when the non-insurgent does not fully endorse the insurgent policy but is clearly influenced by it, for example, canceling student loan debt for a particular subset of Americans like disabled veterans rather than making it universal. Further, since press releases are much longer than tweets, I coded them as "neutral" when the press release mentioned the insurgent policy in passing, for example, "Senator Warren is a leading proponent of canceling student debt," rather than as the central point of the statement.

I used descriptive statistical and network analysis for insurgents' sponsored bills—which and how many cosponsors they have—and insurgents' amendments. All insurgent bills and amendments are from January 3, 2019-November 20, 2021. For the cosponsorship network, I calculated the total number of times each member of Congress has cosponsored legislation with each individual insurgent. For my analyses of incumbents' communications and cosponsorship in relation to their 2020 insurgent challenge, I first collected the dates when insurgents announced their challenge from traditional and social media and the dates of all primary elections.[517] I then coded all communications as "before" if the incumbent issued it before the challenger started their campaign, as "during" if the incumbent issued it between the challenger's announcement and the primary election, and as "after" if it is after the primary election. I used this same temporal coding for tracking changes in their cosponsorship of insurgent policies, using these dates to filter results in Congress.gov between January 3, 2019-February 12, 2022.[518] Here, I calculated the number of

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[516] With press releases, I do not impose a time-frame and include all press releases about the policies going back to the first (with the exception of Medicare for All) until November 28, 2021. I only look at statements from after Bernie Sanders's first presidential campaign announcement in 2015, as there are a few outliers primarily from him from before then.

[517] If multiple insurgents challenged the same incumbent, I use the date from the first announcement.

[518] Note that these cosponsorship data extend into February 2022 rather than just November 2021 unlike the other cosponsorship data I use.

insurgent bills an incumbent cosponsors out of the total the insurgents introduced in each of these periods, before comparing how these rates changed in relation to their primary challenge.

I ran two series of robust OLS multiple regression analyses to estimate the impact of an insurgent challenge on incumbents' cosponsorship of and communications about insurgent policies and to determine why incumbents changed the percent of insurgent bills they cosponsored in relation to their primary. The models test the influence of various measures of an insurgent challenge on incumbents' communications and cosponsorship patterns. The independent variables concern the strength of past and present insurgent challenges, the incumbent's ideology, or the partisan makeup of their district. (See Appendix C for detailed descriptions of the variables in these respective analyses.)

My focus on the three policies (Medicare for All, the Green New Deal, and student debt cancelation) so directly connected to the insurgents follows other scholars' measurement of cooptation but likely underestimates insurgents' influence.[519] Therefore, to estimate the broad legislative salience of four insurgent issues in the Democratic Party, I took data for bills under "health care," "climate change," "student debt | college tuition," and "labor" from Democrats and independents who caucus with the party in both chambers in Congress.gov. The results are from the 111th-117th Congresses; I collected the data on February 10, 2022, roughly halfway through the 117th Congress.

As with the insurgent interview content, I hand-coded the contents of the Biden-Sanders Unity Task Force policy recommendations and Biden's speech into broad categories like "environment" or "higher education." Within these categories, I did close-readings to ascertain patterns, similarities, and discrepancies of the rhetoric with insurgent principles and priorities. I

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[519] E.g., Meguid, "Competition Between Unequals."

completed my analysis of the partywide proposed and passed bills similarly, although I look at the bills' contents on a much broader level and am more reliant on secondary sources to interpret their provisions' significance.

Policy Conversation

Insurgent Tweets

In the last decade, Twitter has become critical infrastructure for political messaging. It allows candidates whose views are far to the left or right of those usually expressed in mainstream media to air their policy ideas, making it a particularly attractive vehicle for insurgents to broadcast the ideas behind their ideological challenge to their host party.[520] So, what are the elected progressive insurgents and Bernie Sanders tweeting about? Figure 21 shows the elected insurgents' most frequently-tweeted words. Their most common words are the verbs "will," "must," "can," "need," "get," "help," "protect," "work," and "working." They also tweeted frequently about "people," "health," "time," "American," "care," "families," "support," "public," "communities," "climate," "federal," and "workers." On the procedural side, "now," "act," "bill," "house," and "Congress," are among their top words. Finally, they tweeted about "covid," "crisis," "rights," and "vote" a notable amount. This suggests that many of their tweets are about what political change they think needs to happen or policy Congress needs to pass, with particular emphasis on health, climate, voting, and workers.[521] None of this is particularly surprising, given the insurgents' ideological orientation, the focus of many of their policy ideas, and the events of 2019-2021.

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[520] Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*; Owen, "New Media and Political Campaigns"; Shannon C McGregor, "'Taking the Temperature of the Room': How Political Campaigns Use Social Media to Understand and Represent Public Opinion," *Public Opinion Quarterly* 84, no. 1 (2020): 236–56.
[521] Data from Twitter.
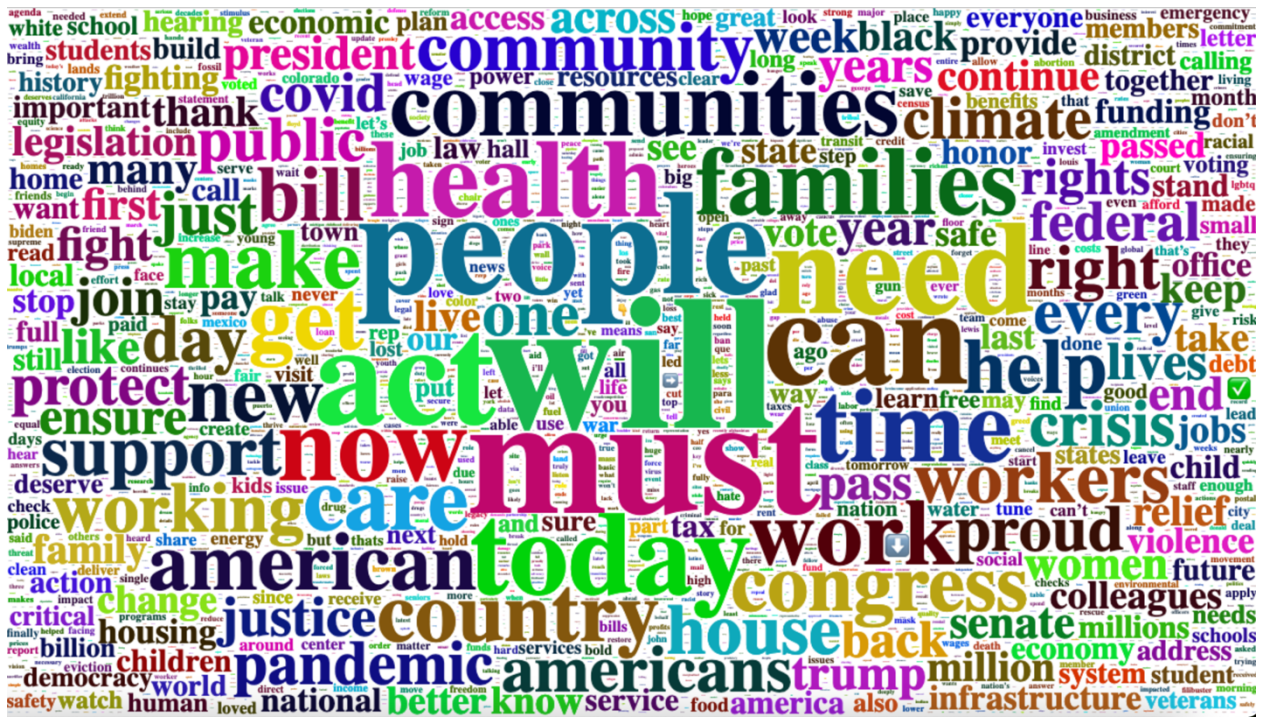
Figure 21: Elected insurgent tweet word-cloud, 1 word. Data from Twitter.

Figure 22 shows insurgents' top three-word phrases, which offers greater insight into the contents of their tweets. They are: "Back Better Act" (in reference to Biden's Build Back Better agenda), "American Rescue Plan," "virtual town hall," "Green New Deal," "child tax credit," "public health crisis," "years ago today," "pay fair share" "cancel student loan debt," "fossil fuel industry," "one step closer," "voting rights act," "congressional art competition," "make ends meet," "minimum wage 15," "health care human right," "health care system," "raise minimum wage," and "student loan debt." Some of their other top three-word phrases are "paid sick leave," "gun violence prevention," "combat climate change," "housing human right," "justice policing act," "racial wealth gap," "put food table," "extend eviction moratorium," and "black brown communities." Notably, three of insurgents' top-five three-word phrases are related to the moderate Biden administration and Democratic Congress's policy agenda: Build Back better, the American Rescue Plan, and the extended child tax credit. This makes sense given the particular political moment and the contents of these plans, which would have or have had a substantial

positive impact on Americans' economic well-being. In this climate, the left wing of the Democratic Party, particularly the Progressive Caucus, has fought harder for the moderate president's agenda than any other faction of the party. It is unsurprising that insurgents also sent many tweets about their major policies like the Green New Deal and student debt cancelation and about health care, voting rights, raising the minimum wage, climate change, and racial justice.[522]

Figure 22: Elected insurgent tweet word-cloud, 3 words. Data from Twitter.

The 16 elected progressive insurgents and Senator Bernie Sanders wrote 196 tweets about what I see as their three key policies out of 36,911 total tweets (0.53%). They issued 45 tweets on Medicare for All, 115 on the Green New Deal, 28 on student debt cancelation, and eight on two or more of these policies.[523] Unexpectedly, given the covid-19 pandemic, most of their tweets about Medicare for All are from before 2020. During the last two years, they have primarily tweeted about the Green New Deal and student debt cancelation. Since all three of these policies' salience

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[522] Data from Twitter.
[523] Data from Twitter; N = 196.

has grown in response to the US' public health and environmental crises of the last several years, it is odd that insurgents did not seize upon the opportunity presented by the pandemic to make the case for Medicare for All as much as they could have.

Insurgent Policy Ideas in Democrats' Tweets and Press Releases

Members of Congress use tweets and press releases to shape public perceptions of their policy agenda, making incumbent Democrats' communications apt media to examine for the influence of insurgents' policy ideas.[524] Of non-insurgent Democrats' 723,594 tweets, 257 (0.036%) mentioned one or more of the three insurgent policies. Seventy-nine incumbents are responsible for all 257 tweets. Figure 23 shows when members of Congress sent these 257 tweets, which insurgent policy they tweeted about, and if their tweet endorsed, criticized, or was neutral about the policy.[525] Incumbents seldom tweeted about Medicare for All, the Green New Deal, and student debt cancelation. When they did, 93% of their tweets endorsed the insurgent policy. Six percent were neutral or expressed no clear stance. The remaining 0.77%—two, to be precise—tweets criticized the Green New Deal. Senator Joe Manchin, one of the most conservative, obstructionist, and beholden-to-coal Democrats, sent both negative tweets.

Figure 23 also shows which of three insurgent policies Democrats tweeted about. They sent 66 tweets about Medicare for All, 141 about the Green New Deal, 47 about student debt cancelation, and 3 about two or more of these policies: the Green New Deal clearly dominates these other insurgent policies in Democrats' tweets. This also shows that overwhelmingly, Democratic incumbents simply do not tweet about the hallmark insurgent policies rather than

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[524] Blum, *How the Tea Party Captured the GOP*; John H Parmelee, "The Agenda-Building Function of Political Tweets," *New Media & Society* 16, no. 3 (2014): 434–50. Again, looking at Democrats' adoption of these three policy ideas by name likely undermeasures insurgents' influence.

[525] Data from Twitter*;* N = 257.

taking to Twitter to condemn them. This communications strategy could be due to the broad popularity of these policy ideas among voters, which makes incumbent silence more palatable than public criticism for politically-engaged and activist constituents.[526]

Figure 23: Timeline of Democratic incumbents' tweets about insurgent policies. Data from Twitter. N = 257.

Democratic representatives—including the elected progressive insurgents and Sanders—issued 612 press releases about insurgent policies: 280 about Medicare for All, 254 about the Green New Deal, and 78 about student debt cancelation. While Democrats dominate messaging about student debt cancelation, this is not true with the other two policies, where Republicans' press releases numerically-mirror or vastly exceed Democrats'. While 45% of statements about Medicare for All are from Republicans who lambast it as "socialized medicine," 74% of statements

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[526] E.g., Jones, "Increasing Share of Americans Favor a Single Government Program to Provide Health Care Coverage"; Manchester, "70 Percent of Americans Support 'Medicare for All' Proposal"; Grandoni and Clement, "Americans like Green New Deal's Goals, but They Reject Paying Trillions to Reach Them"; Deiseroth and Blank, "Voters Overwhelmingly Support the Green New Deal"; Reinicke, "More than 60% of Voters Support Some Student Loan Debt Forgiveness."

about the Green New Deal are from Republicans who tar it as a socialist Trojan horse. With regard

to the persistence of messaging, Democrats are losing—badly.[527] That mention of these insurgent

policies is so lopsided between the two parties cedes ground to the Republican Party and allows

them, and their fear-mongering distortion of these policies' contents, to have an upper hand vis-à-

vis establishment Democrats in the national political discourse.

Not all Democrats have released the same amount of relevant press releases. The most

prolific issuers of statements about these three policies among all Democrats are insurgent Senator

Bernie Sanders with 17% of total press releases, nearly two-thirds of which are endorsement and

a third of which are neutral; ideologically-sympathetic Senators Ed Markey with 8% of the total

(75% of which are positive and 25% of which are neutral) and Elizabeth Warren with 7% of the

total (49% of which are positive, 2% of which are partial, and 49% of which are neutral) and

Representative Ro Khanna with 5% of the total (73% of which are positive and 27% of which are

neutral). Next are Speaker of the House Nancy Pelosi and Representatives Carolyn Maloney and

Debbie Dingell, each with 3% of the total releases. For Pelosi, 24% are partial, 33% are neutral,

and 43% are negative. For both Maloney and Dingell, 71% are positive and 29% are neutral.[528]

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[527] Data from ProPublica; N = 1,628.
[528] Data from ProPublica; N = 612.
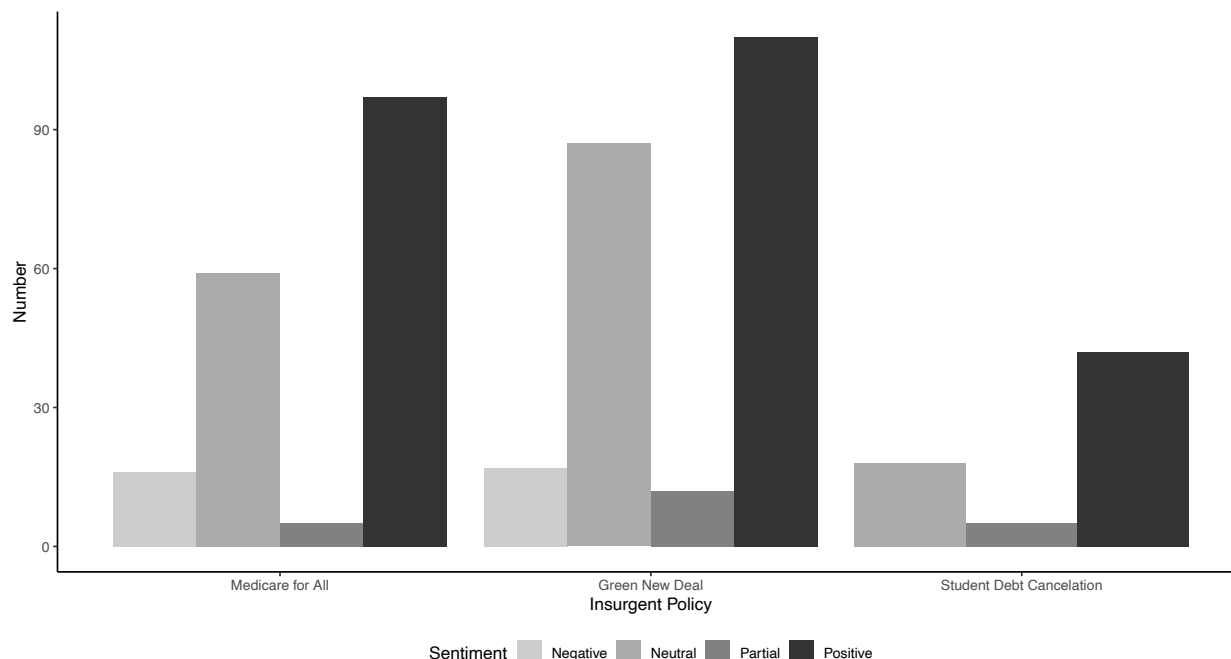
Figure 24: Democratic incumbent press releases about insurgent policies by sentiment and policy. Data from ProPublica. N = 470.

Figure 24 shows the policy and sentiment of the 470 press releases by non-insurgent Democrats in the House and Senate. They released 178 statements about Medicare for All: 55% were positive, 3% were partial, 33% were neutral, and 9% were negative. They released 227 statements about the Green New Deal: 49% were positive, 5% were partial, 38% were neutral, and 8% were negative. Democratic incumbents released 65 statements about student debt cancelation: 65% were positive, 8% were partial, and 28% were neutral. None were negative.[529] As with Democrats' tweets, there are the most statements about the Green New Deal followed by Medicare for All. Student debt cancelation, however, has the highest rate of positive press releases. As with their tweets, half or over half of Democrats' statements about each insurgent policy are endorsements and only a small percentage are direct criticism.

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[529] Data from ProPublica; N = 470.

Timeline of Democratic Communications about Insurgent Policies

The timeline of when Democratic incumbents tweeted about insurgent policies varies by policy, sometimes aligning with broader American social and environmental crises that these policies address and other times unexpectedly deviating from these patterns. Figure 25 breaks down the temporal distribution of tweets by policy. The earliest post-Ocasio-Cortez victory tweet about Medicare for All is from July 2018, the earliest about student debt is from December 2018 (an outlier), and the earliest about the Green New Deal is from February 2019. Most consequential, however, is the rest of the distribution. Incumbents sent half of their tweets about Medicare for All after June 2020, half about the Green New Deal after February 2021, and half about student debt cancelation after April 2021. They started tweeting about Medicare for All reliably first; tweets about this policy are the most evenly distributed. Somewhat bizarrely, the covid-19 pandemic, which began in earnest in the United States in March 2020, did not lead to a major increase in insurgent or incumbent tweets about Medicare for All despite the messaging opportunity it provided. In contrast, incumbents' tweets about student debt cancelation begin around the same time as the pandemic—the latest of the three policies. The pandemic raised the political salience of student loan debt, as successive pandemic stimulus plans under both the Trump and Biden administrations paused student loan payments. In addition to the pandemic, the US has borne witness to increasing climate-change induced chaos from fires to floods in the last several years. The timeline of tweets about the Green New Deal broadly reflects this, with a much higher frequency in 2021 than the years before.[530]
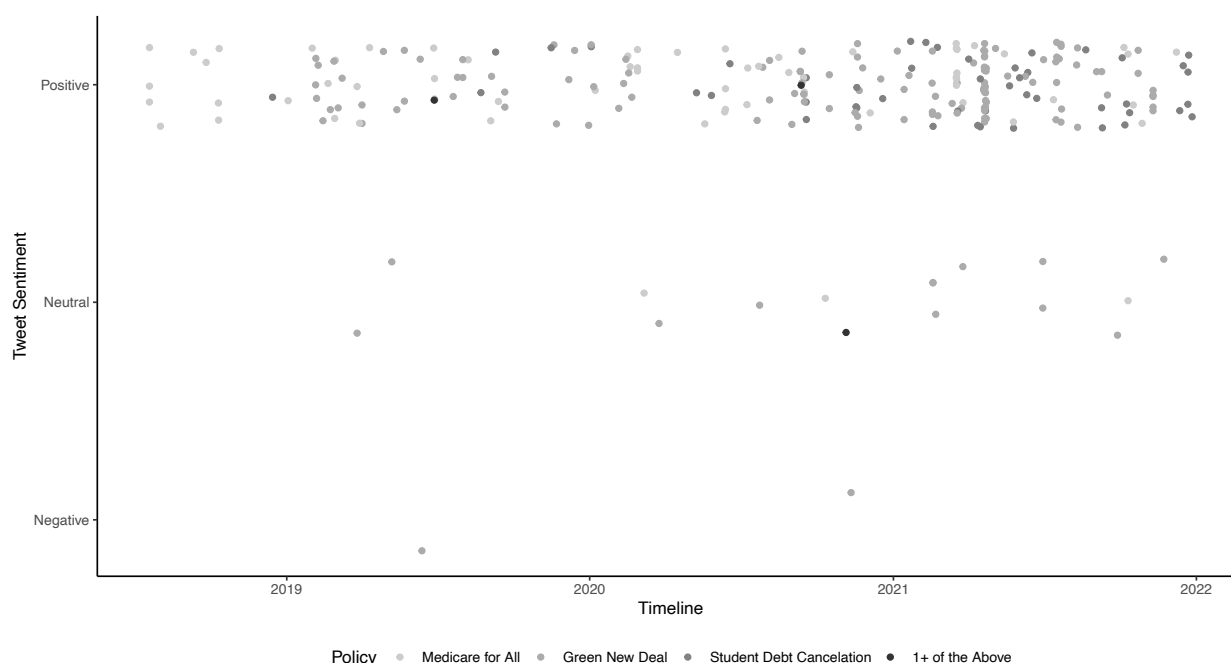
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[530] Data from Twitter; N = 257.
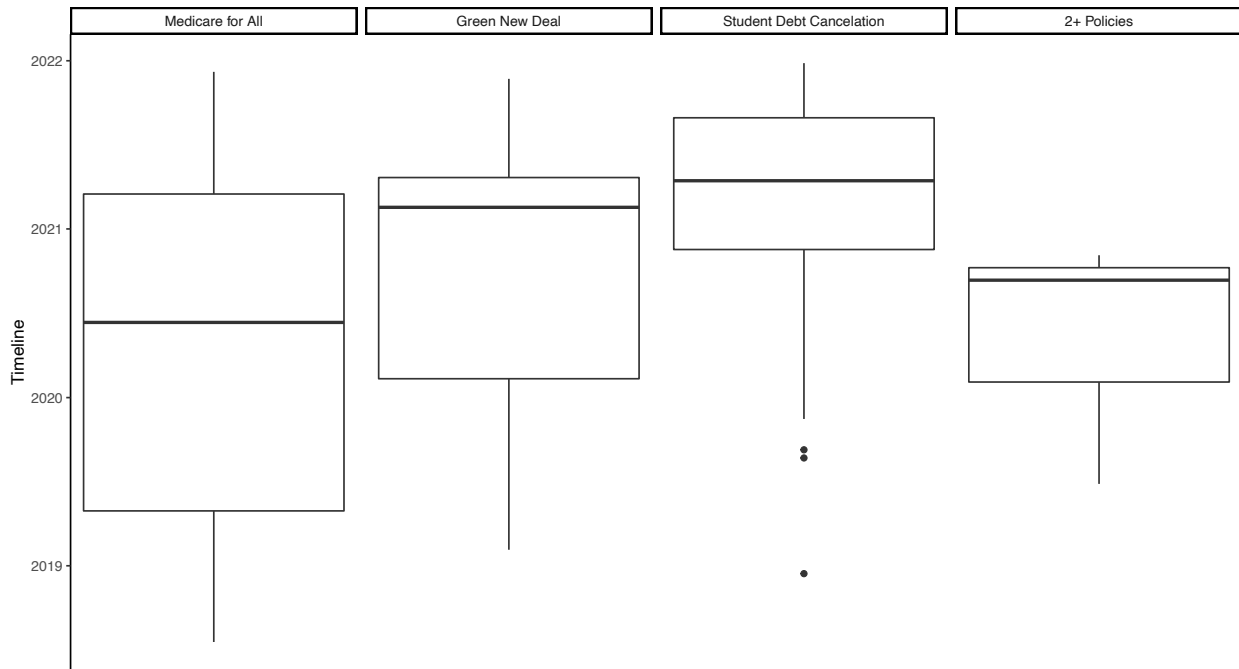
Figure 25: Timeline of Democratic incumbents' tweets about insurgent policies. Data from Twitter. N = 257.

The timeline for when Democratic incumbents began issuing press releases for each of the three insurgent policies echoes that for their tweets: first Medicare for All, starting in September 2016 just after the conclusion of Sanders' first presidential insurgency, then the Green New Deal, starting in November 2018 just prior to Ocasio-Cortez and her insurgent peers' first term in Congress, and finally student debt cancelation, starting in June 2019. The Progressive Insurgency adopted Medicare for All from Sanders's campaign, but it has brought the Green New Deal to center stage (Sanders's first campaign did not have an equivalent environmental policy proposal).[531] The temporal distribution for press releases about each policy, particularly the Green New Deal, differs from tweets. Half of incumbents' press releases about Medicare for All are from after February 2019 but they released more in 2019 than in 2020 and 2021, with the covid-19 pandemic, combined. In contrast, half about the Green New Deal are from after May 2019, meaning that representatives' press releases about it are overwhelmingly concentrated in the six

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[531] Marantz, "The Youth Movement Trying to Revolutionize Climate Politics."

months between November 2018 and June 2019 surrounding the start of the 116th Congress when Representative Ocasio-Cortez introduced the legislation with Senator Ed Markey. Incumbents have released half of their statements about this policy in the two and a half years since May 2019. Finally, they have released half of their press releases about student debt cancelation after September 2020; this policy has the most consistent press release distribution.[532] This shows that insurgent ideas have entered into the Democratic policy conservation at different times, largely but not entirely in response to the rising salience of the issues they address. It also highlights incumbents' incredibly quick adoption of messaging on the Green New Deal following the election of the first insurgents and the lightning rod effect of Ocasio-Cortez's insurgent victory on the Democratic Party's policy conversation.

Proposed Policy

Insurgent Sponsored Bills

Between January 3, 2019, and November 20, 2021, elected insurgents sponsored 582 bills in Congress. Broadly categorized and in descending frequency, insurgents' sponsored bills are primarily about issues concerning finance and the financial sector, government operations and politics, health, the armed forces and national security, crime and law enforcement, public lands and natural resources, education, taxation, housing and community development, and international affairs.

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[532] Data from ProPublica; N = 470.
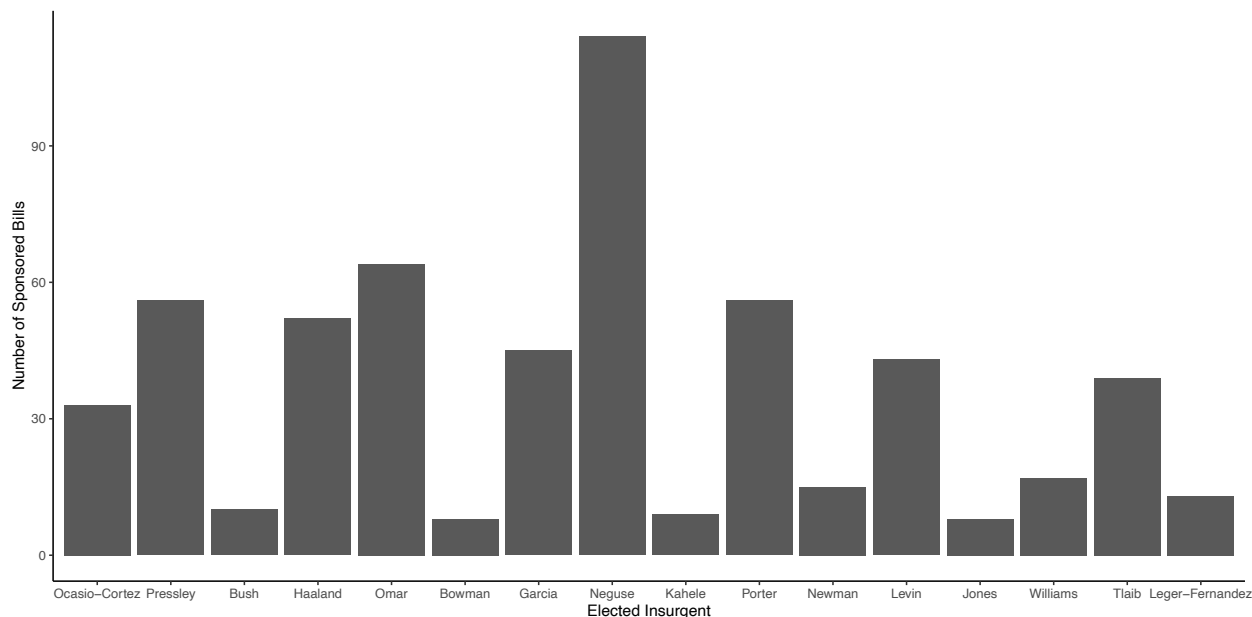
Figure 26: Insurgent sponsored bills, January 2019-November 2021. Data from ProPublica. N = 582.

The nine progressive insurgents elected in the 2018 election introduced 318 bills in the 116th Congress. The sixteen in the 117th Congress have introduced 264 bills in the first year of the Congress.[533] Figure 26 shows the breakdown of the bills by sponsor. The representatives who have served in Congress for nearly three years unsurprisingly have introduced more bills than their newer colleagues. Further, many elected insurgents who are a year into their second Congress are on track to introduce significantly more bills as sophomores than freshmen. These bills serve as the basis for the upcoming analysis of cosponsorship numbers and networks.

Congressional Cosponsorship of Insurgents' Bills

Very few bills make it to the House or Senate floor let alone become law. But members of Congress do not need to vote on bills to express their support and advertise their policy priorities to their

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[533] Representative Deb Haaland only served in Congress for the very beginning of the 117th before President Biden appointed her Secretary of the Interior; there are 15 elected insurgents in the House of Representatives for most of the first year of the 117th Congress. Just after the writing of this, insurgent Sheila Cherfilus-McCormick won a special election, so there are 16 elected insurgents in the second half of the 117th Congress.

colleagues, party leaders, donors, activists, and voters: they can cosponsor bills.[534] Members'
cosponsorship patterns of insurgent-sponsored bills therefore help to illuminate elected insurgents'
impact within Congress. Of insurgents' 582 bills, a quarter have fewer than three cosponsors, half
have fewer than six, and a quarter have more than 20. Four-hundred-eighty-four of insurgents' 582
sponsored bills (83%) have one or more cosponsor.[535] Within these 484 that have a cosponsor, a
quarter have fewer than three, half have fewer than nine, and a quarter have more than 25, as Figure
27 shows.[536] Twenty insurgent bills have more than 70 cosponsors and only 12 bills have more
than 90 cosponsors. The bills with the most cosponsors are Representatives Nikema Williams's
act to rename a major post office after the late John Lewis with 260 cosponsors; Ayanna Pressley's
condemnation of police militarization, brutality and racial profiling with 177 cosponsors;
Pressley's act to strengthen reproductive health care with 160 cosponsors; Joe Neguse's
Coronavirus Community Relief Act with 152 cosponsors; Katie Porter's act for mental health
justice with 125 cosponsors; Deb Haaland's ANTIQUITIES Act with 113 cosponsors; Chuy
García's health equity and Joe Neguse's post office protection bills which both have 106
cosponsors; and Alexandria Ocasio-Cortez's 2019 and 2021 Green New Deal resolutions which
have 103 and 101 cosponsors, respectively.

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[534] Barton, "The Primary Threat"; Blum, *How the Tea Party Captured the GOP*; Gregory Koger, "Position Taking and Cosponsorship in the U.S. House," *Legislative Studies Quarterly* 28, no. 2 (2003): 225–46.
[535] Data from ProPublica; N = 582.
[536] Data from ProPublica; N = 582.
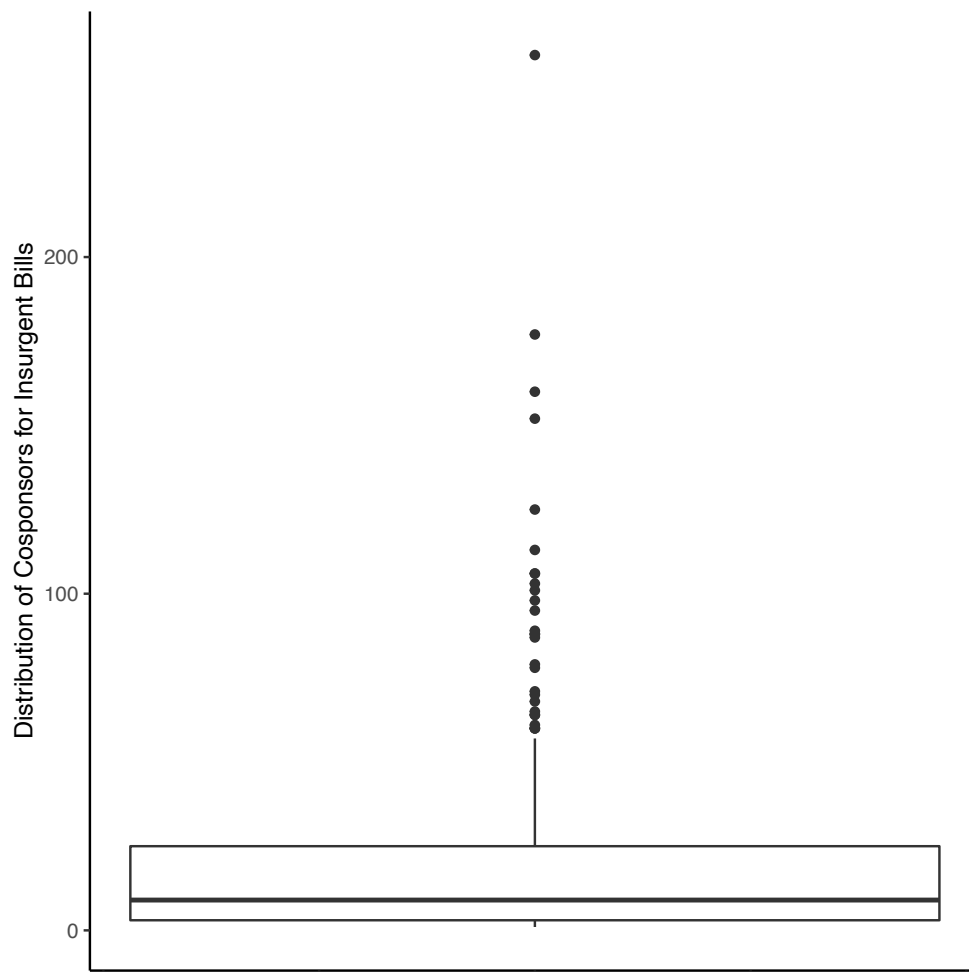
Figure 27: Number of cosponsors for insurgents' bills with 1+ cosponsor. Data from ProPublica. N = 484.

Four-hundred-sixty or 79% of these 582 bills have one or more Democratic cosponsor while 155 or 26% have one or more Republican cosponsor.[537] Every elected insurgent has had at least one Republican member of Congress cosponsor one of their bills, save for Representatives Ocasio-Cortez, Bush, and Jones.[538] Representatives Joe Neguse, Katie Porter, Deb Haaland, and Mike Levin have the most bills with bipartisan cosponsorship. There are likely multiple causes of this pattern. For example, Porter and Levin are the only two insurgents elected from swing districts. Due to congressional district lines in Southern California, both are still geographically close to

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[537] Data from ProPublica; N = 582.
[538] Data from ProPublica; N = 582.

Republican members of the California delegation, some of whom are relatively frequent cosponsors (for Republicans) of insurgent bills. Similarly, the Republican cosponsors on Ilhan Omar's bills are largely also from Minnesota. This suggests that local issues and priorities can still, on occasion, trump partisanship in Congress. Beyond geographic proximity, Republicans tended to cosponsor insurgent bills when the issue is not directly related to the political-social-culture-economic wars that define the present. Put differently, most of their cosponsored bills concern lower-profile issues: there are no Republican cosponsors on legislation like the Green New Deal. These trends correspond with recent research that finds that most successful congressional legislation still earns bipartisan support.[539] Still, it is notable that members of a political party that regularly calls Democrats "socialists" have cosponsored a quarter of progressive insurgents' bills; not only are the insurgents at the left tip of the left wing of the Democratic Party but some of them identify as democratic socialists, unlike mainstream Democrats.

Finally, which members of Congress cosponsor the most insurgent-sponsored legislation? Figure 28 provides a visual network of the top-half of members of Congress who cosponsor insurgent bills. Every representative shown here has cosponsored 12 or more insurgent policies—above the median number of cosponsored policies for all 418 representatives who have cosponsored at least one insurgent bill. That means that over 90% of members of the 116th and 117th Congresses—not just Democrats in these Congresses but all members regardless of party—have cosponsored an insurgent bill.[540] Since members of Congress use cosponsorship to communicate their policy preferences or their closeness to the sponsor's political "brand," this shows that members of Congress view the progressive insurgents to have broad policy appeal.[541]

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[539] James M. Curry and Frances E. Lee, *The Limits of Party: Congress and Lawmaking in a Polarized Era* (Chicago: University of Chicago Press, 2020).
[540] Data from ProPublica; N = 418.
[541] Blum, *How the Tea Party Captured the GOP*; Barton, "The Primary Threat."
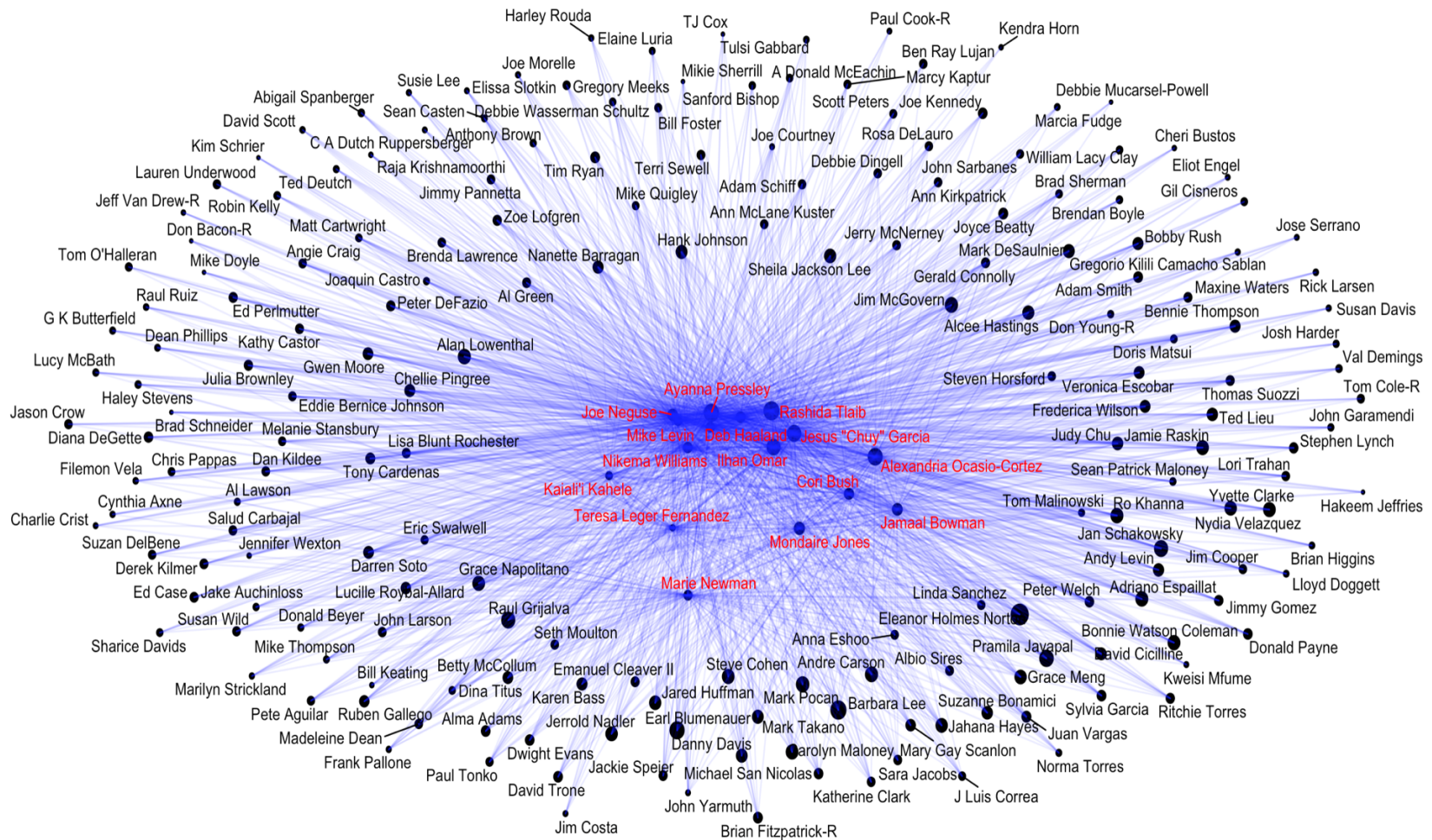
Figure 28: Network of top half of congressional cosponsors of insurgent bills. Nearly all are Democrats; the few Republicans have an -R after their name. The one elected insurgent whose node is not labelled in Katie Porter. Larger points closer to the center indicate that the representative has cosponsored more insurgent policies while smaller points at the periphery indicate that that representative has cosponsored fewer. Data from ProPublica.

The most frequent non-insurgent cosponsors are Democratic Representatives Eleanor Holmes Norton (who has cosponsored 207 bills), Barbara Lee (153), Earl Blumenauer (131), Pramila Jayapal (118), Raul Grijalva (110), Jan Schakowsky (109), Jim McGovern (93), Alan Lowenthal (90), Andre Carson (90), Ro Khanna (88), Adriano Espaillat (86), Bonnie Watson Coleman (85), Carolyn Maloney (84), Grace Napolitano (83), Steve Cohen (83), Nydia Velaquez (82), Jamie Raskin (81), Jerry Nadler (79), Yvette Clarke (78), Jahana Hayes (77), Grace Meng (76), Jared Huffman (75), and Sheila Jackson Lee (75). Many of them are prominent progressive Democrats who comprise the left wing of the party. Jayapal, Grijalva, and Khanna were endorsed by Justice Democrats once they were already members of Congress when the group began in the aftermath of Sanders's 2016 presidential insurgency. Further, in 2020 insurgents challenged Blumenauer, Lowenthal, Maloney, Cohen, Nadler, Clarke, Meng, and Jackson Lee. Due to these representatives' policy proximity to the elected insurgents, most are likely cases of insurgents challenging them because they are progressive rather than insurgents' challenges pushing the incumbents to cosponsor so much legislation with the elected members of the Progressive Insurgency.[542]

Walking the Walk: Comparing Congressional Communications and Cosponsorship

To test the sincerity of members of Congress's tweets and statements about Medicare for All and the Green New Deal, I compared their communications about these policies with their cosponsorship of them.[543] As expected, all of the elected progressive insurgents have either sponsored or cosponsored both pieces of legislation. There are 164 Democratic representatives and

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[542] Data from ProPublica; N = 418.
[543] Proponents of student debt cancelation want the president to exercise his authority to do cancel debt, making this less opportune of a policy to compare communications and cosponsorship.

senators who have endorsed one or both of these policies in a tweet or a press release or cosponsored the legislation in their respective congressional chambers.[544] One-hundred-thirty-seven did so for Medicare for All. Eighty-two of these 137 Democrats (59%) cosponsored insurgent-adjacent Representative Pramila Jayapal's and insurgent Senator Bernie Sanders's 2019 and/or 2021 Medicare for All acts but did not tweet or issue a statement in support of the policy. Fifty-one (37%) Democrats both cosponsored the legislation and communicated about their support for it in at least one of the media. There were only four (3%) Democrats who positively communicated about Medicare for All, implying their endorsement of it, without cosponsoring the legislation.[545]

One-hundred-twenty-two Democratic members of Congress positively communicated about and/or cosponsored the Green New Deal, with considerable overlap with proponents of Medicare for All: 57% of the non-insurgent Democrats who cosponsored either of the two policies cosponsored both.[546] Of the 122, 59 (48%) Democrats cosponsored insurgent Representative Alexandria Ocasio-Cortez's 2019 and/or 2021 Green New Deal resolution or insurgent-adjacent Senator Ed Markey's Senate equivalent without endorsing it via tweet or press release. Fifty-six (46%) Democrats both positively communicated and cosponsored the Green New Deal. Seven (6%) Democrats endorsed the policy in their communications but did not cosponsor the actual legislation.[547]

Thus, about half of the Democratic cosponsors of Medicare for All and the Green New Deal did not communicate their endorsement of the policy via their tweets or their press releases. A slightly smaller percentage both communicated about and cosponsored the legislation. The

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[544] Data from ProPublica; N = 164.
[545] Data from ProPublica; N = 137.
[546] Data from ProPublica; N = 164.
[547] Data from ProPublica; N = 122.

number of Democrats who communicated about their support for Medicare for All and the Green New Deal without also cosponsoring the legislation pales in comparison, suggesting that their communications about these policies are in fact sincere for the most part.

Insurgent Amendments

Elected insurgents have introduced 61 amendments.[548] Forty-nine (80%) passed the House. This success is not equally shared by all insurgent representatives. Figure 29 shows how many amendments each insurgent has introduced and how they have fared. All of Representative Katie Porter's ten amendments, Rashida Tlaib's eight, Deb Haaland's three, Mike Levin's two, Chuy García's one, and Teresa Leger-Fernandez's one have passed. Also quite high, 89% of Representative Joe Neguse's nine amendments, 81% of Ayanna Pressley's 11, and 80% of Ilhan Omar's five amendments have passed. In contrast, only 50% of Representative Jamaal Bowman's two amendments, 25% of Alexandria Ocasio-Cortez's eight, and 0% of Cori Bush's one amendment have passed. Representatives Kai Kahele, Marie Newman, Mondaire Jones, and Nikema Williams, all of whom began their tenure in the 117th Congress, have yet to introduce any amendments.[549] Ocasio-Cortez is in many ways the face of the Progressive Insurgency and yet a much lower rate of her amendments to bills have passed compared to her peers. Her low success rate is an exception: overall, most insurgent amendments pass the House.

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[548] They have introduced this many amendments since the start of the 116th Congress on January 3, 2019, to November 26, 2021.
[549] Data from ProPublica; N = 61.
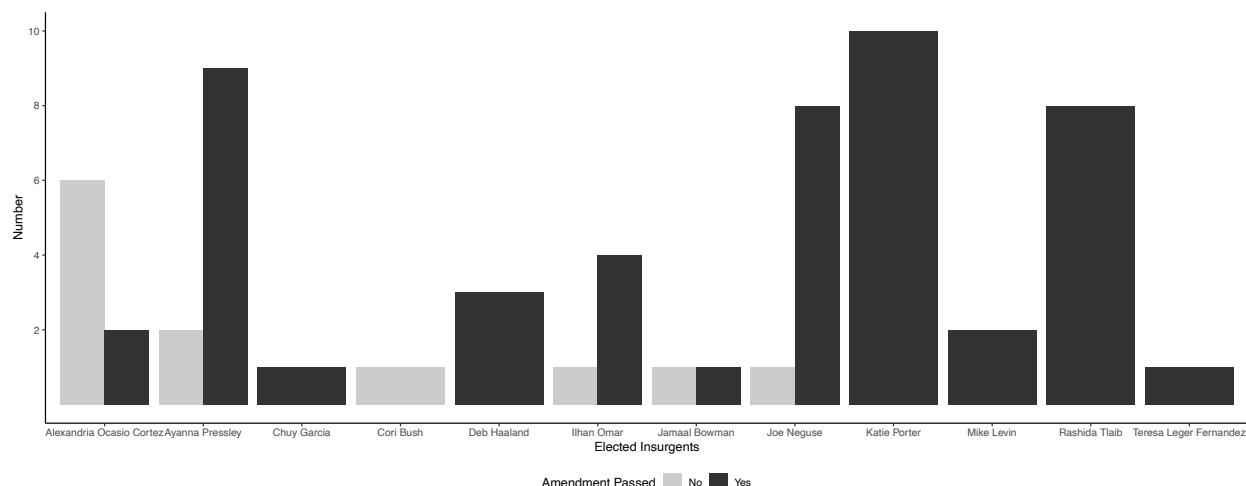
Figure 29: Status of insurgent amendments. Reps Kai Kahele, Marie Newman, Mondaire Jones, and Nikema Williams have not introduced any amendments. Data from ProPublica. N = 61.

The type of vote through which amendments are passed or invalidated impacts their rates of success. All insurgent amendments that came up for a voice vote passed, while 75% of those that underwent a recorded vote and 50% up for a simple yea/nay vote did.[550] These patterns are likely partly explained by the anonymity of voice votes, which protect incumbents who may fear their image will be hurt by voting for something affiliated with the progressive insurgents. This, however, is not a full explanation as a significant number of amendments passed via recorded vote received the support of Republican members of Congress in addition to nearly every Democrat. Insurgent amendments that pass are largely appropriations that channel small amounts of federal money to some particular issue, such as $1 million to the Health Resources and Services Administration for domestic violence strategy or moving $15 million from the Center for Disease Control's HIV account to one for opioid-related infectious diseases. Others amend relevant bills with modifications to voting rights or environmental legislation, for example.[551]

While these high rates of insurgent amendment passage in the House indicate the traction

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[550] Data from ProPublica; N = 61.
[551] Data from ProPublica.

of their policy proposals, most of these amendments were to bills that ultimately did not become law. Thus, they show the progressive insurgents' influence within the House but largely not on policy that materially impacts Americans' lives.

The Legislative Salience of Insurgent Issues in Democrats' Proposed Bills

Since much of the above analysis focuses on Democratic support and cooptation of three key insurgent policies, likely significantly underestimating their influence, I supplement this with an examination of the changing salience of these three broad issues—climate change, college tuition and debt, and health care—plus organized labor in the congressional Democratic Party. Figure 30 shows the number of bills pertaining to these issues that Democrats introduced, that passed either the House or the Senate, or became law in the 111th-117th Congresses (2009-2021). The immediately visible pattern is that Democrats introduced significantly more bills concerning climate change, college tuition and debt, health care, and organized labor when they have control of both chambers of Congress. Democrats had control of the House of Representatives and the Senate in the 111th Congress, which coincided with the first half of Barack Obama's first term, the 116th Congress, which coincided with the second half of Donald Trump's presidency and was the first with elected progressive insurgents as members, and the 117th Congress, which coincides with the start of Joe Biden's presidency.
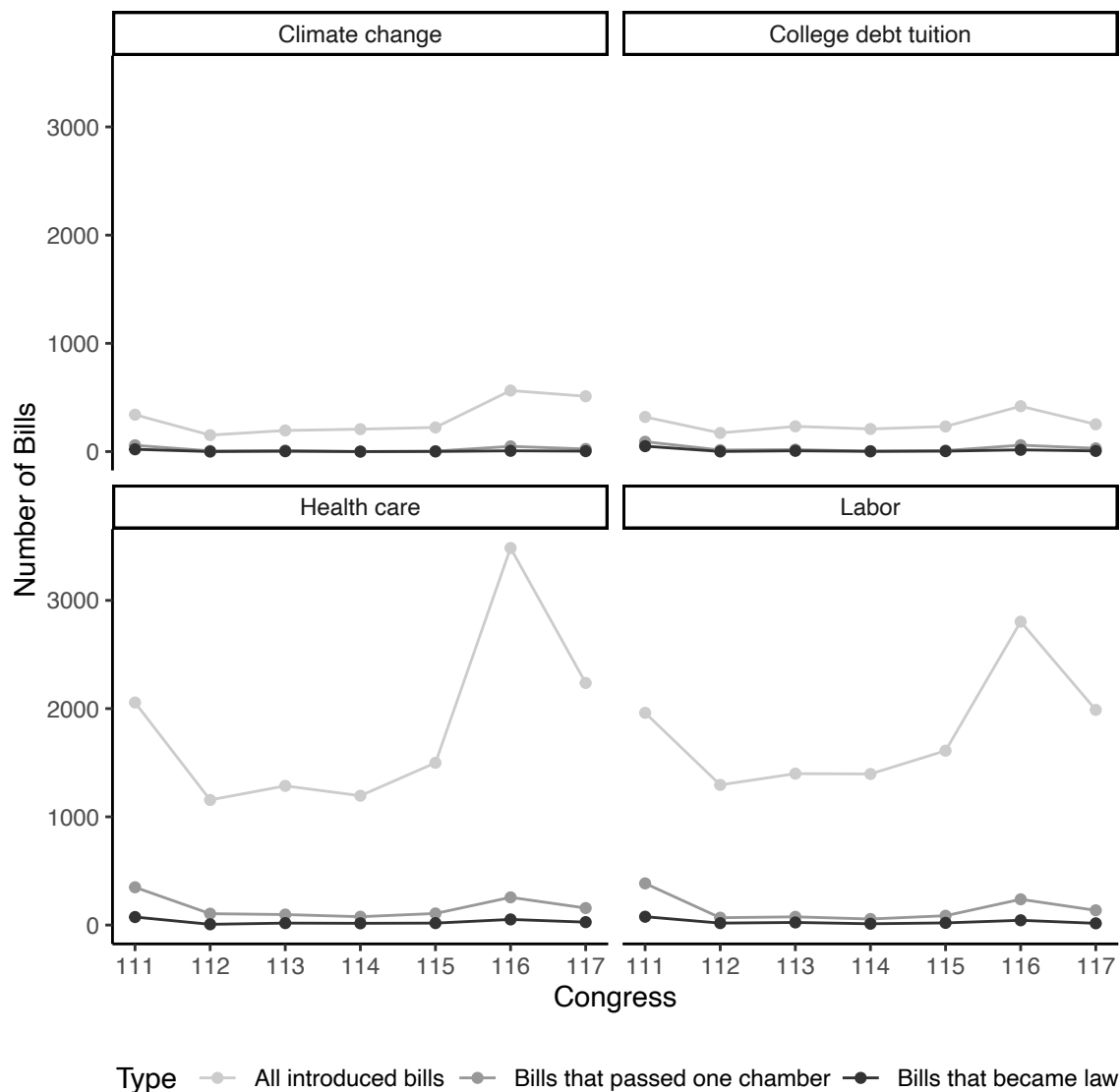
Figure 30: Legislative salience of insurgent issues for congressional Democrats. Data from Congress. N = 29,396.

Given this, it only makes sense to compare the relative salience of these four issues in Democratic-controlled Congresses. Democrats introduced 165% as many bills concerning climate change in the 116th Congress than in the 111th and one year in, have already introduced 90% as many bills in the 117th Congress as in the 116th. They proposed 131% as many bills on college tuition and debt in the 116th Congress than in the 111th, and 60% as many bills in the 117th than in the 116th. Democrats introduced 169% as many health care bills in the 116th Congress than in the 111th, and 64% as many in the 117th as in the 116th. They wrote 143% as many bills on labor in the

116th Congress than in the 111th Congress, and 71% as many in 117th as in the 116th.[552] These numbers show the increased salience of all four issues in the two Democratic-controlled Congresses since Bernie Sanders's first presidential bid and the start of the Progressive Insurgency. Of particular note is the rise in Democratic health care bills between the 111th and 116th Congresses. Health care reform was President Obama's signature issue and the Affordable Care Act was passed in the 111th Congress. Despite this, or perhaps because of inadequacies of the program, Democrats introduced 169% as many health care bills in the 116th Congress than that one. Roughly halfway through the 117th Congress, Democrats are on track to introduce more bills on all four issues in this Congress than in the last. Not all or even most of the increase in the legislative salience of these issues is due to the insurgents, but they have contributed to keeping these issues at the center of the party's legislative agenda.

Passed Policy

Having examined progressive insurgents' impact on the Democratic Party's policy conversation and proposed policy, the final question remains: what about policy that becomes law? I look at this on two scales: insurgent sponsored bills that have passed and their principles and priorities in one of major party-wide bills that became law in 2021, the American Rescue Plan in response to the ongoing pandemic, when their names are less closely affiliated with the policy.

Passed Insurgent Bills

Of elected insurgents' 582 sponsored bills, six have become law for a passage rate of roughly 1%. Two bills became law in 2020: one sponsored by Rashida Tlaib on "Representative Payee Fraud

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[552] Data from Congress, https://www.congress.gov/; N = 29,396.

Prevention" and one by Joe Neguse on "Authoriz[ing] the Every Word We Utter Monument." In 2021, four insurgent-sponsored bills passed: Joe Neguse's Rocky Mountain National Park Ownership Correction and Rocky Mountain National Park Boundary Modification acts and Mike Levin's THRIVE Act and one to improve veteran health care.[553] This is obviously a very low rate of bill success, although it is not extraordinarily lower than for Congress as a whole.[554] Thus, a few bills and amendments with insurgents' names on them have passed into law. Their direct policy impact on this scale may be small but it is not nonexistent.

Democrats to the Rescue! A Comparison of the Party's 2009 and 2021 Crisis Legislation

The first major piece of legislation that the narrowly Democratic 117th Congress and President Biden passed in 2021 was the American Rescue Plan, a $1.9 trillion pandemic stimulus and relief bill. Comparing this legislation to President Obama's 2009 equivalent, the American Recovery and Reinvestment Act, from the last time there was an acute economic crisis and the Democrats had control of all three branches of the federal government provides broad evidence of the Democratic Party's leftward movement since Bernie Sanders's first presidential bid and the Progressive Insurgency's advent.

There are several provisions of the American Rescue Plan that warrant special attention. Most consequentially, the act dramatically expanded the child tax credit and changed its delivery to direct payments to parents rather than a credit for them to claim after taxes. This expanded payment went to all eligible families, rather than just those who filed taxes, and significantly lowered the rate of child poverty in the United States. The American Rescue Plan also gave $1,400

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[553] Data from ProPublica; N = 582.
[554] "Historical Statistics about Legislation in the U.S. Congress," *GovTrack*, https://www.govtrack.us/congress/bills/statistics.

direct payments to Americans in the third round of stimulus checks, continued expanded unemployment benefits, covered COBRA premiums for unemployed workers who lost their health insurance along with their jobs in the pandemic, and extended rental eviction and mortgage foreclosure moratoria. It also contained a provision that any student loans forgiven in the next five years would not count as taxable income, which they otherwise would, which many elected and failed progressive insurgents hope augurs future presidential action on the issue.[555]

Due to the parallels of crisis conditions and Democratic trifecta control—however narrow—of the federal government, the American Rescue Plan deserves comparison to the 2009 American Recovery and Reinvestment Act which the 111th Congress and newly-elected President Obama passed as stimulus for the Great Recession. The Democratic Party's 2008 and 2020 national platforms show a general increase in Democratic commitment to redistributive policies, some of which are a sharp increase from the prior platform and some of which increase in line with the existing trend.[556] The sharpest contrast is in the party's subsequent stimulus legislation. The American Recovery and Reinvestment Act, passed in February 2009, was an $831 billion stimulus that many have criticized for bailing out Wall Street rather than homeowners and other Americans suffering from the economic downturn. Its primary provisions for Americans were an up-to-$800 tax deduction and increased Medicaid funds for states to address Americans' increased use of Medicaid during the recession.[557]

Compared to the 2009 stimulus, the 2021 American Rescue Plan did much more for ordinary Americans. The different scope of these stimulus bills and the greater emphasis on aiding

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[555] American Rescue Plan Act of 2021, Pub. L. 117-2, 135 Stat. 4 (2021), https://www.congress.gov/117/plaws/publ2/PLAW-117publ2.pdf.

[556] Amelia Malpas and Adam Hilton, "Retreating from Redistribution? Trends in Democratic Party Fidelity to Economic Equality, 1984–2020," *The Forum* 19, no. 2 (2021): 283–316.

[557] American Rescue and Reinvestment Act of 2009, Pub. L. 111-5, 123 Stat. 115 (2009), https://www.congress.gov/111/plaws/publ5/PLAW-111publ5.pdf.

Americans rather than just bailing out business in the 2021 Rescue Plan compared to the 2009 Recovery and Reinvestment equivalent is significant evidence of the Democratic Party's leftward movement. Bernie Sanders gave large credit to the Progressive Insurgency for the scope of the bill, describing it as "the most consequential piece of legislation for working class people" in decades.[558] And (as shown earlier this chapter) it was the elected insurgents' second-most tweeted phrase, showing their own association with it. Still, based on its provisions, the American Rescue Plan is more reflective of the progressive insurgents' indirect influence through pushing the party left than of their specific, direct influence on the particular policies within the bill.

Last, the significance of the difference between these two stimulus bills grows when contextualized with the size of Democrats' majorities in both branches of Congress at the time of their passage: Democrats had a 58-seat majority in the Senate and 255-seat majority in the House of Representatives in 2009 compared to a 50 (plus the vice president)-seat majority in the Senate and a 222-seat majority in the House in 2021. Further, the respective new Democratic presidents in these two moments had different intraparty brands: Barack Obama was the outsider who got elected on "hope and change" while Joe Biden was the veteran insider and proud moderate. That the Democratic Party passed the American Rescue Plan with these constraints on the Biden administration and 117th Congress compared to the bigger opportunities for the Obama administration and 111th Congress—the only two congresses in this period where the party has had such control—points strongly to the party's broader leftward movement over the last long decade.

The Effects of Insurgent Primary Challenges on Incumbent Policy

As incumbent members of Congress prize holding on to their institutional power above all else,

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[558] Bernie Sanders, interviewed by Amelia Malpas, April 4, 2022.

the mere threat of a challenger can impact their political behavior.[559] As such, my analysis until now has focused on the progressive insurgents' impact on the entire congressional Democratic Party. I now look specifically at how their challenges have influenced the primaried incumbents' policy positions, evidenced through their communications about and cosponsorship of insurgent policies.

Communications from Challenged Incumbents

Twenty-four of the 79 Democrats who tweeted about Medicare for All, the Green New Deal, and student debt cancelation faced a progressive challenger. These 24 challenged Democratic incumbents sent 66 of the 257 tweets (26%). Incumbents first challenged in 2018 wrote seven tweets; those first challenged in 2020 sent 59.[560] This is roughly to be expected given that progressive insurgents targeted three times more Democratic incumbents in 2020 than in 2018. Incumbents challenged in 2020 sent a quarter of their tweets between January and August 2020, during the 2020 congressional primaries: representatives' tweets about insurgent policies are most concentrated in this period. But these incumbents sent a quarter of their relevant tweets prior to early 2020 and findings from Chapter 2 show that a substantial number of the challenged Democratic incumbents are in the party's most liberal caucuses. These incumbents sent half of their relevant tweets since the end of the 2020 congressional primaries, perhaps to ward off a 2022 progressive challenger or perhaps because they were already predisposed to support these policies before they were challenged.

One-hundred-seven incumbent Democratic members of Congress released 476 press

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[559] Boatright, *Getting Primaried*; Barton, "How Challenges in Primaries Shift the Policy Agendas of Political Parties"; Barton, "The Primary Threat"; Kamarck and Wallner, "Anticipating Trouble: Congressional Primaries and Incumbent Behavior."
[560] Data from Twitter; N = 257.

releases about the three key insurgent policies. Of these, 134 (28%) were released by 22 incumbents whom progressive insurgents primaried.[561] Nearly all statements from Democrats first challenged in 2018 begin in 2019 at the start of the 116th Congress, when Ocasio-Cortez was sworn in, and primary concern the Green New Deal rather than other policies. As with tweets, there is a similar cluster of incumbent press releases during the 2020 primary season for those first challenged in 2020. These incumbents have released half of their statements since April 2019, a few months after the start of the 116th Congress and right at the start of the 2020 campaign season when insurgents began announcing their challenges. They continued steadily through 2020 and 2021 and are largely endorsements of the policy.

These findings on challenged incumbents' tweets and press releases give credence to two causal relationships: that incumbents tweeted more about insurgent policies once insurgents challenged them or that insurgents targeted liberal incumbents who were already communicating about these policies. It is likely a mix of both. By examining only incumbents' positive communications, new patterns emerge. Thirty-three of the 164 Democratic members of Congress who either positively communicated about or cosponsored Medicare for All or the Green New Deal have faced an insurgent challenge. Two-thirds of them communicated about their endorsement of these policies. In contrast, only half of the Democrats who were not challenged communicated about these policies. This broadly suggests that challenged incumbents are more likely to communicate their support for insurgent policies that they cosponsor than are their colleagues who do not face a progressive primary challenge.[562]

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[561] Data from Twitter; N = 476.
[562] Data from ProPublica; N = 164.
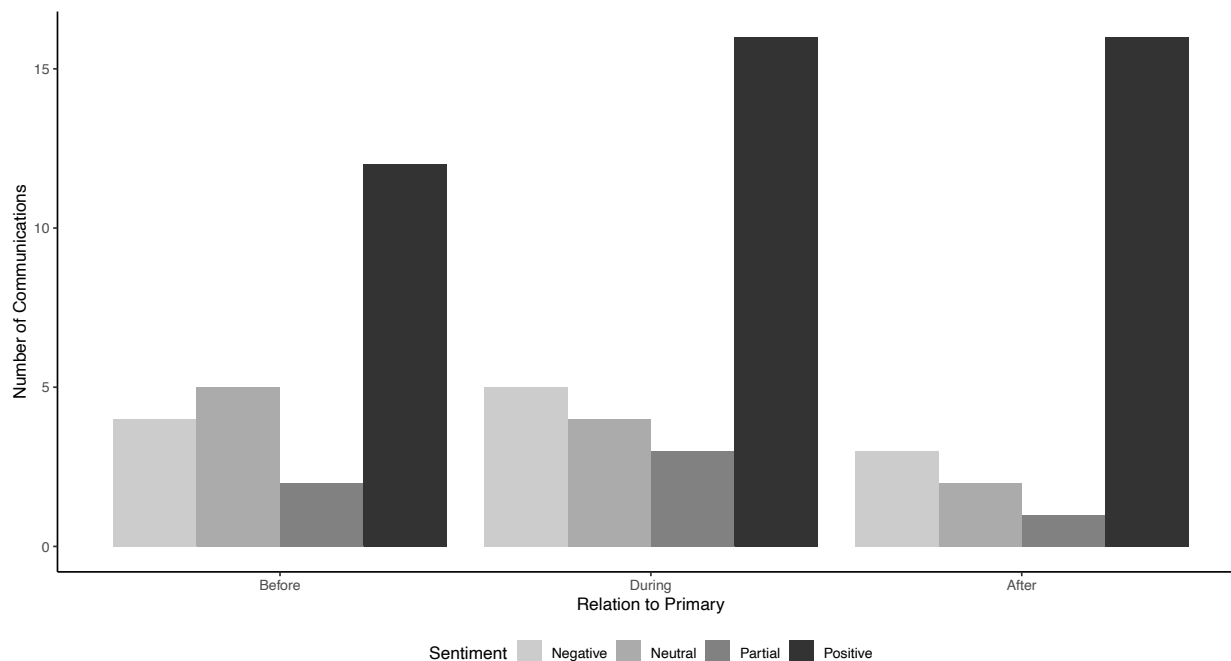
Figure 31: Challenged Democratic incumbents' communications about insurgent policies in relation to the primary election. Data from Twitter and ProPublica. N = 188.

To further illustrate how Democrats' communications about insurgent policies changed in relation to an insurgent challenge, Figure 31 shows whether incumbents challenged in 2020, after progressive insurgents successfully defeated two in 2018, issued their tweets and press releases before, during, or after their primary election.[563] It shows that there was a 25% increase in their positive communications from 12 before the primary to 15 during the primary, a level that continued after the primaries. Their partial endorsement communications increased by 50% from two before the primary to three during the primary, before falling after. Incumbents' neutral communications consistently fell from their height before the primary to their nadir after. Interesting, their negative communications rose by 20% from four before the primary to five during the primary, before subsequently decreasing.[564]

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[563] To reiterate from the methods section, the "during" period is between the date the insurgent announced their challenge and the date of the primary election.
[564] Data from Twitter and ProPublica; N = 188.

The three most prolific communicators about insurgent policies were Representatives Carolyn Maloney, Earl Blumenauer, and Debbie Dingell—each of whom issued most of their statements in a different period. Blumenauer issued 12 statements before the primary, three during, and four after, indicating that his communications about these policies preceded his insurgent challenge. Dingell, on the other hand, issued seven statements before the primary, 16 during the primary, and five after it; unlike Blumenauer, the large increase in her communications corresponds strongly to the timing of her primary challenge. Meanwhile, Maloney had no positive communications before the challenger announced her bid, two during the primary, and 16 after the primary. Maloney is facing a Justice Democrats-backed challenger in 2022, which has likely incentivized her massive increase in communications about insurgent policies after her 2020 primary. As part of her response to this challenge, she is also chairing the first hearings on Medicare for All since 2019 with insurgent Representative Cori Bush in spring 2022.[565] Not among the most frequent communicators, Representatives Doris Matsui and Tom O'Halleran provide further insight into incumbents' different communications patterns. While Matsui has only ever issued one positive statement about an insurgent policy, she sent it the day after her challenger announced their bid. O'Halleran, a conservative Democrat, took the opposite approach: his only communications about insurgent policies were during the primary and all were negative. Thus, this shows that different incumbents' communications varied considerably in relation to their primaries, precluding a definitive pattern of their communications in response to a progressive insurgent challenge.

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[565] Aída Chávez, "Progressives Want to Put Medicare for All Back on the Table," *The Nation*, March 24, 2022, https://www.thenation.com/article/politics/medicare-cori-bush/.

The Effect of Insurgent Challenges on Incumbents' Communications and Cosponsorship

To further test how an insurgent primary challenge impacts incumbents' communications and cosponsorship, I ran a series of multiple regression analyses where the respective dependent variables are the incumbent's number of positive communications about Medicare for All, the Green New Deal, and student debt cancelation and the number of insurgent bills the incumbent has cosponsored. The N is every non-insurgent Democrat who has cosponsored one or more insurgent bill. To see the influence of an insurgent challenge or the challenger's percent of the primary vote on their communications and cosponsorship, I controlled for other independent variables relating to the incumbent's ideological position within the Democratic Party and the partisan makeup of their district.

Incumbent Total Cosponsorship and Communications Regression Table

Independent Variables	Cosponsorship, Challenged (Model 1)	Cosponsorship, Percent (Model 2)	Communications, Challenged (Model 3)	Communications, Percent (Model 4)
Challenged	1.63 (3.95)	—	**1.56 *** **(0.77)**	—
Challenged percent	—	-0.04 (0.14)	—	**0.04 *** **(0.02)**
Progressive Caucus	**15.77 ***** **(3.33)**	**15.61 ***** **(3.33)**	**1.28 **** **(0.42)**	**1.27 **** **(0.42)**
Medicare for All Caucus	**18.29 ***** **(3.82)**	**18.37 ***** **(3.84)**	**1.87 ***** **(0.54)**	**1.85 ***** **(0.54)**
New Democrats Coalition	-3.35 (2.70)	-3.17 (2.72)	**-0.65 *** **(0.26)**	**-0.69 *** **(0.26)**
Blue Dog Caucus	-4.69 (3.08)	-3.91 (3.01)	-0.42 (0.33)	-0.35 (0.30)
Cook PVI	0.34 (0.20)	0.36 (0.19)	-0.02 (0.02)	-0.02 (0.02)
(Intercept)	**17.26 ***** **(2.96)**	**17.40 ***** **(3.01)**	0.43 (0.24)	**0.51 *** **(0.24)**
N	233	233	233	233
R^2	0.41	0.41	0.18	0.17

*** $p < 0.001$; ** $p < 0.01$; * $p < 0.05$.

Table 3: Incumbent total cosponsorship and communications. Robust OLS regression.

As Table 3 shows, Model 1 tests the influence of an insurgent challenge on the total number of insurgent bills an incumbent has cosponsored. It finds that an incumbent's membership in the Progressive and Medicare for All caucuses are the strongest predictors of their cosponsorship of insurgent bills. Incumbents in the Progressive Caucus cosponsored an average of 15.7 more insurgent bills than Democrats not in the caucus, while those in the Medicare for All Caucus cosponsored an average of 18.3 more bills than those not. Being challenged is not a statistically-significant determinant of the number of insurgent bills an incumbent cosponsors.

Model 2 uses the same variables, this time looking at the influence of the percent of the vote the challenger received rather than simply if an insurgent challenged the Democrat. It shows similar results for the incumbents' membership in the Progressive and Medicare for All caucuses and does not find any significant influence from the percent of the vote that the insurgent earned.

Model 3 tests the influence of an insurgent challenge on an incumbent's total number of positive communications about Medicare for All, the Green New Deal, and student debt cancelation. It finds that incumbents' caucus memberships and being challenged are the greatest predictors of their communications about insurgent policies. Incumbents in the Medicare for All Caucus wrote an average of 1.9 more tweets or press releases endorsing insurgent policy than Democrats not in the caucus. Those in the Progressive Caucus released an average of 1.3 communications more than their colleagues not in it. In contrast to the effects of membership in these liberal caucuses, incumbents in the New Democrats Coalition issued an average of 0.7 fewer positive communications than those not in the caucus. Challenged incumbents issued an average of 1.6 more communications than those who were not challenged.

Model 4 is the same as Model 3, except that it determines the influence of the insurgent's primary vote share rather than simply if they challenged an incumbent. It finds nearly identical

influence of incumbents' membership in the three caucuses as Model 3. It also shows that for every one-point increase in the challenger's primary vote, incumbents issued an average of 0.04 more positive communications about insurgent policy.

These results reveal that incumbents' ideological position within the Democratic Party, as measured by their membership in the four ideologically-indicative caucuses, is the greatest predictor of their cosponsorship of and positive communications about insurgent policies. Further, they show modestly greater enthusiasm for insurgent policies on behalf of Democrats in the Medicare for All Caucus than in the Progressive Caucus, suggesting that the Medicare for All Caucus was comprised of further left Democrats than the Progressive Caucus. An insurgent challenge did not on average affect the number of insurgent bills the incumbents has cosponsored, a greater commitment than communicating about policy. It did on average impact their communications endorsing Medicare for All, the Green New Deal, and student debt cancelation, a lesser commitment than cosponsorship. This shows insurgents' challenges to have a greater impact on incumbents' rhetoric and the party's policy conversation than their association with elected insurgents' proposed policies. These various measurements confirm that insurgent primary challenges broadly affect Democratic incumbents' communications about insurgent policies.

Changes in Challenged Democrats' Rates of Cosponsorship of Insurgent Bills

The above regression analyses explore incumbents' cosponsorship of insurgent policies in the aggregate, without examining how incumbents' rates of insurgent bill cosponsorship changed in relation to their primary challenge. Since incumbents may use cosponsorship to emphasize their proximity to insurgents' policy to weaken the challengers' ideological case against them and hold on to their seat, I determine how incumbents challenged in 2020 changed the proportion of

insurgent bills they cosponsored in response to their primary challenge. Half of challenged Democrats increased their cosponsorship of insurgent policies by 59% or more from before the insurgent announced their challenge to after the primary election. A quarter increased their cosponsorship by more than 138% while a quarter decreased their cosponsorship by more than 26%.[566] This demonstrates substantial increases in incumbents' cosponsorship of insurgent legislation in response to a progressive insurgent primary challenge. Interestingly, challenged incumbents increased their rates of cosponsorship from before the primary to after the primary much more than from before to during the primary. This suggests that the actual primary election, beyond the campaign before, underscored the insurgent threat for incumbents and they subsequently tried to preempt a future challenge through their increased cosponsorship.
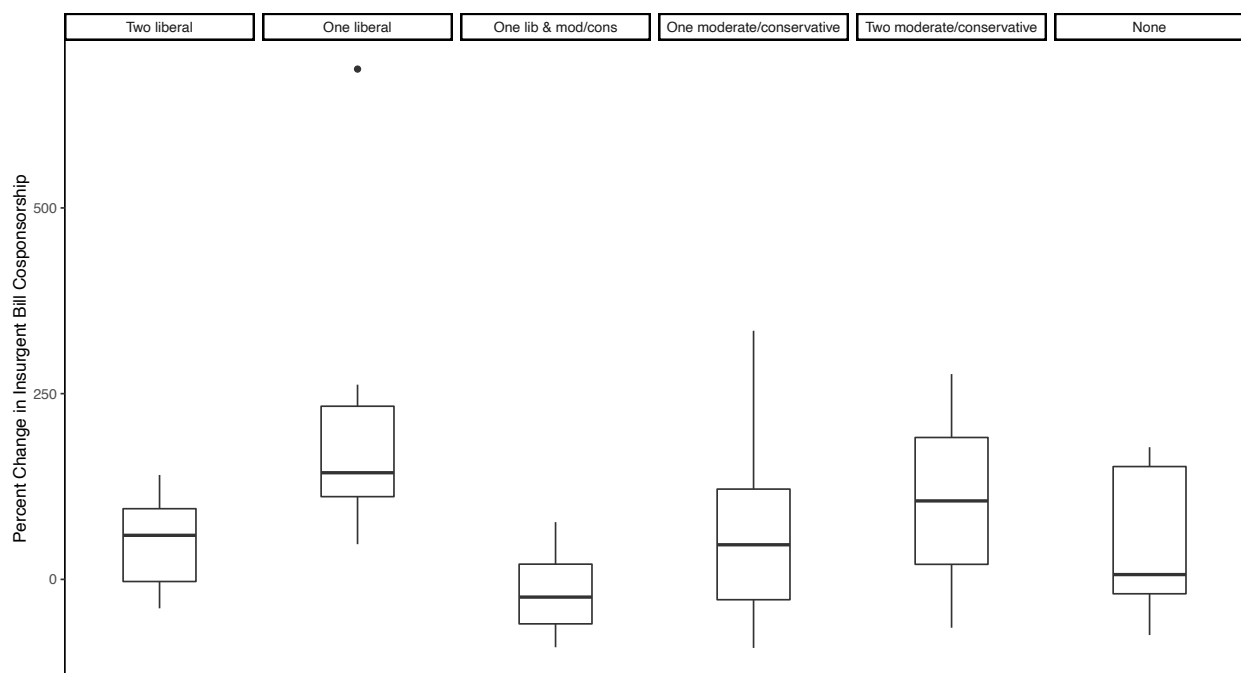
Figure 32: Percent change in cosponsorship of all insurgent bills before/after primary challenge by caucus membership. N = 47.

As with their other responses to insurgent challenges, incumbents' preexisting ideological disposition influenced their behavior. Figure 32 shows the distribution of the extent of change in

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[566] Data from Congress.gov; N = 47.

incumbents' cosponsorship of insurgent policies from before to after their primary challenge by their caucus membership. The incumbents in one liberal caucus increased their cosponsorship of insurgent legislation the most; half cosponsored over 143% more bills after their primary challenge than before. While incumbents in both liberal caucuses cosponsored the most insurgent policies, their median increase in cosponsorship was 59%—less than incumbents only in one liberal caucus who may have felt more pressure to shore up their progressive credentials in the face of an insurgent challenge.[567] Interestingly, half of incumbents in both one liberal caucus and one moderate/conservative caucus decreased their cosponsorship by more than 23%, the most negative change. The median increase in insurgent cosponsorship for incumbents in one moderate/conservative caucus was 46% and 105% for those in both of those caucuses. These incumbents tended to cosponsor the lowest total number of insurgent bills, but they increased their cosponsorship at similar rates to incumbents who cosponsored more insurgent legislation in absolute terms. Finally, incumbents in none of these caucuses had a median increase of 6% in insurgent bill cosponsorship, hardly any change.

What factors, including but not limited to caucus memberships, explain the different increases or decreases in 2020 challenged incumbents' rates of cosponsorship of insurgent bills?[568] To determine this, I ran a series of multiple regression analyses. The dependent variables vary by model: they are either the percent change in incumbents' cosponsorship during the primary challenge or from before to after it for all elected insurgents or just the extended "Squad." The independent variables whose influence I test are the percent of the vote a challenger against them received in 2018, if their state had a successful insurgent victory over an incumbent in 2018, what

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[567] Blum, *How the Tea Party Captured the GOP*; Barton, "The Primary Threat"; Koger, "Position Taking and Cosponsorship in the U.S. House."

[568] I do not include the three incumbents who lost their primaries to progressive insurgents in this, since I fear that they would distort the results given how well these insurgents performed.

percent of the vote the 2020 insurgents received, the number of challengers running against them in 2020, how many of the liberal and moderate/conservative caucuses the incumbent is in, and the partisan makeup of their district.

Incumbent Change in Insurgent Cosponsorship Regression Table

Independent Variables	Incumbent Change, During (Model 1)	Incumbent Change "Squad" Insurgents, During (Model 2)	Liberal Incumbent Change, After (Model 3)	Moderate/Conservative Incumbent Change, After (Model 4)
Challenger(s) percent in 2018	-1.45 (2.85)	-0.80 (2.69)	**10.87 * (4.70)**	NA
State with 2018 insurgent defeat of incumbent	60.09 (58.55)	**89.35 * (34.62)**	-92.65 (95.58)	84.22 (124.73)
Number of 2020 insurgents	-63.62 (70.39)	12.61 (64.30)	-356.75 (175.88)	209.19 (149.45)
Challenger(s) percent in 2020	—	—	17.03 (11.46)	-0.24 (3.93)
Number of liberal caucuses	12.88 (16.92)	22.83 (12.90)	—	—
Number of moderate/conservative caucuses	-16.82 (39.83)	-9.56 (14.00)	—	—
Cook PVI	0.78 (1.85)	-2.02 (1.02)	1.87 (3.58)	-7.67 (5.54)
(Intercept)	77.55 (77.92)	-10.55 (71.12)	189.38 (112.93)	NA
N	44	44	17	15

| R^2 | 0.18 | 0.35 | 0.54 | 0.15 |

*** $p < 0.001$; ** $p < 0.01$; * $p < 0.05$.

Table 4: Incumbent change in insurgent cosponsorship. Robust OLS regression.

As Table 4 shows, Model 1 tests if any of the independent variables exert significant impact on incumbents' change in cosponsorship from before their primary challenge to after their primary election. It finds that none are statistically significant.

Model 2 similarly looks at incumbents' changed cosponsorship rates from before to during their primary challenge, but only of the bills introduced by the original "Squad" and four other nearly as visible elected insurgents rather than for all sixteen elected insurgents. It finds that past progressive insurgents' success in the incumbent's state has the greatest impact on their changed rates of insurgent bill cosponsorship. Incumbents in a state where a progressive insurgent defeated an incumbent in 2018 averaged a 89% greater increase in their cosponsorship of insurgent bills than incumbents in states where none had previously won. This is quite substantial. It is the only impactful factor and corresponds to research on incumbents' special attention to primary election threats within their state.[569]

Model 3 tests the influence of these independent variables on the change in cosponsorship of incumbents in the Progressive Caucus and/or the Medicare for All Caucus, before and after their primary challenge. It finds that each one-point increase in a 2018 insurgent's primary vote share led to incumbents to increase their rate of cosponsorship by an average of 10.9%. Incumbents whom progressive insurgents have challenged multiple times took past challengers' primary performance into account in their response to a new challenger. No other factors are significant.

Model 4 determines what variables influence the change in cosponsorship of incumbents in the New Democrats Coalition and/or Blue Dog Caucus, before and after their primary challenge. It finds no statistically-significant factors.

These results show that the relative success of 2018 progressive insurgents, either in the

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[569] Kamarck and Wallner, "Anticipating Trouble: Congressional Primaries and Incumbent Behavior."

incumbent's district or in their state, are the greatest determinants of how much incumbents changed their cosponsorship of insurgent bills in relation to a progressive primary challenge in 2020. Unlike their total number of cosponsored insurgent bills, which are most influenced by their ideology, these findings show that incumbents' changes in cosponsorship are most impacted by how severe of a threat they perceive insurgents to present to them. Incumbents' response to being challenged depends on how well past insurgents in their district or state have done, which they pay attention to.[570]

Incumbent Policy Cooptation

> "By the end of the primary, everybody supported Medicare for All," Patrick Nelson, 2018 insurgent in NY-21.[571]

> "I felt like [the incumbent] definitely recognized that she wasn't going to win the ideological battle," Stevens Orozco, 2020 insurgent in TX-18.[572]

Many progressive insurgents reported that the incumbent (or in a few cases, other non-incumbent Democrats in the primary) changed some of their policy stances toward the insurgent's by election day. Several incumbents pledged their support for two of the insurgency's signature policies, Medicare for All and the Green New Deal.[573] Angelica Dueñas advanced from her top-two primary in 2020 to face Representative Tony Cárdenas in the general election in CA-29 and came within points of defeating him. Dueñas, who is running again in 2022 with more insurgent organization backing, said, "We do know that they're scared and they are changing their ways. Tony just

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[570] Although my research is focused on challenged incumbents' changes in cosponsorship of insurgent bills, this broadly corresponds with Barton, "The Primary Threat" findings on how ideological challenges change the bipartisan makeup of incumbents' own sponsored bills as they seek less compromise and emphasize their ideological credentials.
[571] Patrick Nelson, interviewed by Amelia Malpas, August 17, 2021.
[572] Stevens Orozco, interviewed by Amelia Malpas, August 17, 2021.
[573] Progressive insurgent interviews.

verbally endorsed the Green New Deal and Medicare for All. We are already affecting policy and we're not even in Congress yet."[574] Zina Spezakis, a 2020 challenger in NJ-09, explained, "Within a week of my announcement, [the incumbent] went on NPR, which he never does, and said, 'I support the Green New Deal.'"[575] Another challenger reported that after the incumbent cosponsored the Green New Deal, his campaign manager "was like, 'Oh, no, she signed on to the Green New Deal.' I said, 'this is a good thing, because the whole point was watch her respond to our campaign which means that we're influencing her decisions.'"[576]

Other challengers moved incumbents on other issues, like softening a hard pro-Israel representative into being a bit more pro-Palestine and making another known for his defense industry ties and hawkish foreign policy slightly more dovish. Shahid Buttar's challenge to Speaker of the House Nancy Pelosi made her revise her stances on policies regarding organized labor and policing. The "crowning achievement" of Buttar's campaign was "tail-wagging the biggest dog in politics" through shaming Pelosi into supporting the Protecting the Right to Organize (PRO) Act, which she eventually brought up for a successful House floor vote.[577]

While many challenged incumbents tried to show that their support was deeper than rhetoric, some gave only superficial concessions.[578] During the primary, one Blue Dog Democrat framed himself as an environmental champion and made it seem like he supported "universal" health care. While not the same as pledging support for the Green New Deal and Medicare for All, this was clearly in response to the insurgent's policy pressure.[579] But the insurgent reported that his primary challenge incentivized the incumbent to change only his rhetoric but not his behavior.

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[574] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021.
[575] Zina Spezakis, interviewed by Amelia Malpas, August 6, 2021.
[576] Stevens Orozco, interviewed by Amelia Malpas, August 17, 2021.
[577] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021; Progressive insurgent interviews.
[578] Progressive insurgent interviews.
[579] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.

In another race, the moderate incumbent started calling himself an "FDR Democrat" once the challenger announced his bid but did not adopt insurgent policy.[580]

Policy cooptation, as one challenger put it, "demonstrates the policy impact of an unsuccessful political campaign."[581] By coopting insurgent policy, incumbents attempted to neutralize the threat of insurgents' challenge for their institutional power—either in the immediate against a specific challenger or to try to preempt a future challenge. After Ocasio-Cortez proved that progressive insurgents could win, mainstream congressional Democrats could no longer afford to be "complacent" or "comfortable in their incumbency" as they have to contend with the "new electoral energy" of an "organiz[ing] progressive base."[582] That changes incumbents' policy calculus. Establishment Democrats may "kick and scream" against their leftward movement, but the Progressive Insurgency has momentum as its candidates challenge them for their votes.[583]

The Rise and Fall of Insurgent Ideas in—and the Prospects of—Biden's Build Back Better

The Progressive Insurgency's varying levels of influence on the Democratic Party's policy are exemplified by the evolution of their ideas in President Biden's Build Back Better agenda from the post-presidential primary Unity Task Force recommendations in August 2020 to his first address to a joint session of Congress in April 2021 to the $3.5 and $1.75 trillion versions of the bill in the fall of 2021.

Progressive Insurgent Ideas in Presidential Policy Proposals

In the summer of 2020, after Biden defeated Bernie Sanders in the Democratic presidential

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[580] Progressive insurgent interviews.
[581] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[582] Ryan Khojasteh, interviewed by Amelia Malpas, September 18, 2021.
[583] Zina Spezakis, interviewed by Amelia Malpas, August 6, 2021; Progressive insurgent interviews.

primaries, the two presidential aspirants tried to bring their two factions of the party together. The result was the joint Biden-Sanders Unity Task Force policy recommendations. Biden and Sanders each appointed elected officials, academics, and other policy-writers to represent their stances on issue committees ranging from the economy to the environment.[584] The Unity Task Force was an explicit overture to the left wing of the Democratic Party from its moderate presidential nominee: its policy recommendations incorporate priorities and principles of both factions. In following the evolution of insurgent ideas from the Unity Task Force recommendations to President Biden's April 2021 address to a joint session of Congress,[585] I pay particular attention to the influence of Medicare for All in health care policy, the Green New Deal in environmental, social, and labor policy, and student debt cancelation in higher education policy. I also make note of where Biden's proposals invoke universal policy—or something very close to that—and implicate government action more than individual action in markets to achieve the policy objectives, following insurgents' preferred policy design.

Of these three issues, the Progressive Insurgency's greatest impact in the Task Force recommendations was in environmental policy. While not called the Green New Deal, its recommendations incorporated substantial objectives and principles from the eponymous resolution. The Task Force recommended among other things that the US government "repeal fossil fuel subsidies" and "expand federal incentives to help those that choose to transition to high-productivity, lower-emission, and regenerative agricultural practices in order to build a more resilient, equitable, and inclusive food system and rural economy."[586] A refrain throughout its

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[584] Marantz, "Are We Entering a New Political Era?"

[585] Commentators colloquially referred to this speech as a State of the Union speech, and like one of them, President Biden made it to a joint session of Congress, but it was technically not an official State of the Union address.

[586] "Biden-Sanders Unity Task Force Recommendations," *Joe Biden for President*, August 2020, https://joebiden.com/wp-content/uploads/2020/08/UNITY-TASK-FORCE-RECOMMENDATIONS.pdf.

sections on climate and economic policy was that green jobs must be well-paying, dignified, unionized jobs, whether in renewable energy, retrofitting existing physical infrastructure, or in green manufacturing. Accordingly, the Task Force report stated that "the climate crisis is an opportunity to improve lived conditions for the American people." This sentiment is reflective of the heart of the Green New Deal as an environmental-social policy. Further, there can be no "sacrifice zones" and everyone—especially those historically left out due to their race, class, or gender—must benefit from the clean energy economy.[587] That is, climate justice must inform US climate policy: there must be special attention to providing a just transition to communities on the "frontline" that have suffered the most from the extraction and consumption of fossil fuels and have the most to lose from climate change, including coal and oil workers.[588]

The climate-labor proposals in Biden's congressional address were a fainter echo of the Green New Deal than the Task Force recommendations. His strongest declaration was in his discussion of what he was then calling the American Jobs Plan, "a once-in-a-generation investment in America itself … the largest jobs plan since World War II." He orated, "For too long, we've failed to use the most important word when it comes to meeting the climate crisis: 'jobs.' Jobs. Jobs. For me, when I think 'climate change,' I think 'jobs.'"[589] Biden connected this to his plea to Congress to pass the PRO Act which would strengthen organized labor in numerous ways, including making it easier to unionize a workplace. Biden's greatest deviation from the insurgents and the Green New Deal was the inflection of nationalist competition with China when speaking about these climate proposals.[590]

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[587] "Biden-Sanders Unity Task Force Recommendations."
[588] Ibid.
[589] "Remarks by President Biden in Address to a Joint Session of Congress," *The White House*, April 29, 2021, https://www.whitehouse.gov/briefing-room/speeches-remarks/2021/04/29/remarks-by-president-biden-in-address-to-a-joint-session-of-congress/.
[590] "Remarks by President Biden in Address to a Joint Session of Congress."

There was no comparable reflection of Medicare for All in the Task Force's health care recommendations or Biden's address. The closest the Task Force came to this insurgent policy is that the government should "ensure automatic access to the public option—administered by Medicare and not by commercial insurance companies—once it is put in place [and] include the choice of a no-deductible option."[591] It also stated that the federal government should cover 100% of COBRA coverage, allow Americans to enroll in Medicare at age 60 rather than 65, and use Medicare to negotiate prices for prescription drugs. While these recommendations would make the US health care system one small step closer to what part of a single-payer system could look like, the influence of Medicare for All was very faint.[592] It was essentially absent from Biden's speech; his greatest reflection of the Task Force's recommendations was that Congress should "give Medicare the power to save hundreds of billions of dollars by negotiating lower drug prescription prices."[593]

Progressive insurgents want to cancel $50,000 of student debt for all Americans and make public university tuition free. Insurgents' biggest influence in the Task Force's student debt recommendations was its advocacy of presidential executive action to cancel $50,000 of student debt (in increments of $10,000 per year) for educators and others in public service. Further, it recommended that federal student debt should be canceled for those with tuition-related debt from public universities who earn less than $125,000 a year and for students who went to predatory colleges. As part of covid-19 relief, the president should immediately cancel $10,000 per borrower. It also stated that public university should be tuition-free for students whose families make less than $125,000 and community college free for everybody. Although not as sweeping and universal

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[591] "Biden-Sanders Unity Task Force Recommendations."
[592] Ibid.
[593] "Remarks by President Biden in Address to a Joint Session of Congress."

as insurgents' desire to cancel all student debt, the Task Force's provisions on student debt cancelation and tuition closely resembled insurgents' policy.[594] Biden espoused the Task Force's tuition-free public university and community college proposition in his address to the joint session of Congress but made no mention of canceling student debt. In this, Biden's proposal was only a partial emulation of the Task Force's recommendations that strongly reflect insurgent policy.[595]

Thus, of the three key policies, progressive insurgents' impact on the Democratic Party has been greatest with the Green New Deal and student debt cancelation, even if proposals to do the latter have not received President Biden's stamp of approval. Insurgents' influence regarding Medicare for All has been the smallest. But, to reiterate, Biden is a moderate Democrat. His embrace of some of the principles and priorities of progressive insurgent policies is an indication of the party's recent leftward movement: they are now part of what it means to be a centrist Democrat.

Beyond these three policies, the Democratic Party's left turn is evidenced in other policy proposals in the Unity Task Force and Biden's address to the joint session of Congress. It is quite notable how strongly pro-worker and -organized labor the Task Force recommendations were: in nearly every policy area, from social infrastructure like health care and childcare to physical infrastructure, it stated the importance of the workers being well-paid and unionized. In its platforms, the Democratic Party's support of predistributive policies that empower workers and organized labor has grown significantly since the 1980s and 1990s, reaching a high in 2020.[596] But even in comparison to the 2020 Democratic platform, the Unity Task Force's recommendations were remarkable for connecting labor to nearly every other issue.[597] Biden's speech was also

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[594] "Biden-Sanders Unity Task Force Recommendations."
[595] "Remarks by President Biden in Address to a Joint Session of Congress."
[596] Malpas and Hilton, "Retreating from Redistribution?"
[597] "Biden-Sanders Unity Task Force Recommendations."

littered with a healthy number of paeans to the power and importance of unions. Perhaps even more than in redistributive social policies, the party's recent leftward movement is evident in just how proud and unabashed its support for organized labor is. While the Democrats have a nearly-century long alliance with labor, its current level of support across the party—from Bernie Sanders and the elected progressive insurgents to President Joe Biden—is remarkably resurgent and strong.

In his address to Congress, Biden also discussed several proposals under his social rather than physical infrastructure American Families Plan that follow Task Force recommendations. One provision would extend the pandemic expanded direct child tax credit for several more years, drastically lowering the rate of child poverty. Another notable provision of this plan is that it would guarantee Americans 12 weeks of paid family and medical leave; the US is an outlier globally (not just among wealthy nations) for not providing its people with basic paid leave. Perhaps the potentially most transformative part of Biden's proposed American Families Plan is creating universal pre-school for young children.[598] Although my focus in this chapter is on three particular insurgent policies, their direct influence on who and what interests to prioritize clearly extends beyond health care, environmental, and student debt policy to other social policies.[599]

The Fall of Insurgent Ideas in Build Back Better and the Death of the Bill

The social policy package that President Biden called the American Families Plan in his April 2021 congressional speech would come to be known as Build Back Better by the summer. In August, Democrats proposed an expansive $3.5 trillion version of the bill. This bill underwent

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[598] "Remarks by President Biden in Address to a Joint Session of Congress"; Andrew Prokop, "Democrats' Child Care Plan Could Help Millions — or It Could Be a Big Mess," *Vox*, November 22, 2021, https://www.vox.com/22744837/house-senate-democrats-build-back-better-child-care. The implementation of a later version of this plan, however, would more strongly parallel the ACA than, say, public kindergarten.

[599] "Biden-Sanders Unity Task Force Recommendations"; "Remarks by President Biden in Address to a Joint Session of Congress."

multiple revisions throughout the fall, as different caucuses and senators exercised their leverage. The newly-assertive Progressive Caucus's insisted that the Bipartisan Infrastructure bill—what Biden called the American Jobs Plan in his speech—be passed with Build Back Better.[600] For several months, their strategy had the support of Speaker of the House Nancy Pelosi and Biden.[601] By mid-November, the Progressive Caucus lost their upper hand: the House and Senate passed, and then the president signed into law, the Bipartisan Infrastructure Bill without the corollary social infrastructure Build Back Better.[602] About a week later, the House of Representatives passed a $1.75 trillion version of the bill, which was subsequently stalled after conservative Democratic Senator Joe Manchin's declarations that he could not vote for the bill even in its pared back form. This is, in short, what the elected insurgents and leadership of the Progressive Caucus feared would happen if the Bipartisan Infrastructure bill passed alone.[603] The initial $3.5 trillion version of the bill was remarkable in its ambition, leading some to describe it as the most significant social policy since the Great Society or even the New Deal. The $1.75 trillion version that the House passed was much less ambitious but still notable compared to the Democratic Party of the last several decades.[604] Insurgent influence shrank with Democrats' downsizing of Build Back Better.

The $1.75 trillion version of Build Back Better's most transformative provisions concerned climate change and social policy. Its $555 billion investment in renewable energy and other measures to address climate change would reduce US greenhouse gas emissions by half compared

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[600] Cochrane, "House Progressives Won't Vote for the Infrastructure Bill Unless the Senate Approves $3.5 Trillion in Other Spending."; Weisman, "Deeply Divided, House Democrats Battle Over Priorities and Politics"; Marans, "How Rep. Pramila Jayapal Turned The Progressive Caucus Into A Powerful Force."

[601] Marans, "How Rep. Pramila Jayapal Turned The Progressive Caucus Into A Powerful Force."

[602] Weisman, "Deeply Divided, House Democrats Battle Over Priorities and Politics."

[603] Ryan Cooper, "The Democratic Party's Biggest Problem Is Its Conservative Wing," *The American Prospect*, March 21, 2022, https://prospect.org/politics/democratic-partys-biggest-problem-conservative-wing/.

[604] Eric Levitz, "The Build Back Better Framework: The Good, the Bad, the Ugly," *Intelligencer*, October 28, 2021, https://nymag.com/intelligencer/2021/10/the-build-back-better-framework-the-good-the-bad-the-ugly.html; Jr James Roosevelt et al., "Build Back Better Is a 21st Century New Deal," *The Hill*, November 20, 2021, https://thehill.com/opinion/white-house/582443-build-back-better-is-a-21st-century-new-deal/.

to 2005 levels and provide tax credits to incentivize Americans to produce solar energy on their rooftops and to buy American-made electric vehicles. It also would create a Civilian Climate Corps, modeled after the New Deal's Civilian Conservation Corps, to employ young people in environmental and climate resiliency and recovery projects.[605]

For social policy, the $1.75 trillion version of Build Back Better created free preschool and establishes 7% as the maximum percentage of household income that parents spend on childcare. The $3.5 trillion bill made this free in addition to three years of tuition-free community college, which Democrats cut from the House's $1.75 trillion version. It would also extend the American Rescue Plan's expanded direct payment child tax credit for a year.[606] The House-passed version of Build Back Better included four weeks of paid family and medical leave; the earlier $3.5 trillion version contained 12 weeks. The second version of Build Back Better also allocated funds to build and repair affordable housing, including public housing. While the original proposal included a pathway to citizenship for some Deferred Action for Childhood Arrivals (DACA) recipients, the Senate parliamentarian ruled that this provision was not eligible to be passed under budget reconciliation, which the bill had to be to overcome the filibuster and Democrats' extremely narrow control of the Senate.[607]

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[605] "A Bill to Provide for Reconciliation Pursuant to Title II of S. Con Res 14," H.R. 5376, 117th Congress, 1st session (2021), https://www.congress.gov/117/bills/hr5376/BILLS-117hr5376rh.pdf; "President Biden Announces the Build Back Better Framework," *The White House*, October 28, 2021, https://www.whitehouse.gov/briefing-room/statements-releases/2021/10/28/president-biden-announces-the-build-back-better-framework/; Deirdre Walsh, "President Biden Unveiled a $1.75 Trillion Build Back Better Plan. Here's What's in It," *NPR*, October 29, 2021, sec. Politics, https://www.npr.org/2021/10/29/1050620525/president-biden-unveiled-a-1-75-trillion-build-back-better-plan-heres-whats-in-i; Reuters, "Factbox: What's in Biden's $1.75 Trillion 'Build Back Better' Package?," *Reuters*, November 19, 2021, sec. COP26, https://www.reuters.com/business/cop/whats-bidens-175-trillion-build-back-better-package-2021-11-05/.

[606] Because the legislation did not become law, this payment expired at the end of 2021.

[607] "A Bill to Provide for Reconciliation Pursuant to Title II of S. Con Res 14"; "President Biden Announces the Build Back Better Framework"; Levitz, "The Build Back Better Framework"; "Factbox: What's in Biden's $1.75 Trillion 'Build Back Better' Package?"; Melissa Quinn and Kathryn Watson, "What's in Democrats' $1.75 Trillion Social Spending and Climate Bill?," *CBS News*, November 18, 2021, https://www.cbsnews.com/news/bill-build-back-better-spending-bill-contents/.

The $1.75 trillion Build Back Better would also improve health care coverage and services. It increased benefits for eligible residents of states that did not expand Medicaid under the Affordable Care Act's (ACA's) incentives. It added hearing care to Medicare coverage—the earlier version also added dental and vision coverage to Medicare—and slightly lowered premiums for Americans who buy insurance through the ACA's marketplace. It enabled Medicare to negotiate drug prices for those that have been available for a decade.[608]

So, some of the contents of the final version of Build Back Better that the House passed were a faint echo of the insurgents' ideas that Biden advocated for in his congressional speech or the Unity Task Force recommended. However, Democrats cut many of its strongest provisions during the fall negotiations between the president, conservative Democrats in both branches of Congress but particularly Senators Joe Manchin and Kyrsten Sinema (whom the party's shrinking of the bill aimed to please), and progressive Democrats. That is, a large part of what made the $3.5 trillion version of Build Back Better so remarkable was the extent to which its new policies were close to being universal—at least relative to past American social policy—and easily tangible and accessible for its beneficiaries, reflective of progressive insurgent objectives, scale, and policy design.[609]

This first version of Build Back Better also targeted Americans often neglected in social policy and historically excluded from the material benefits of dignified labor and full citizenship. Put differently, some of its programs were surprisingly inclusive in determining Americans' eligibility. For example, it waived a work requirement—filing taxes—as a precondition for parents

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[608] "A Bill to Provide for Reconciliation Pursuant to Title II of S. Con Res 14"; "President Biden Announces the Build Back Better Framework"; Walsh, "President Biden Unveiled a $1.75 Trillion Build Back Better Plan. Here's What's in It"; Quinn and Watson, "What's in Democrats' $1.75 Trillion Social Spending and Climate Bill?"; "Factbox: What's in Biden's $1.75 Trillion 'Build Back Better' Package?."

[609] Jeff Stein, "The Left Dreamed of Remaking America. Now, It Stares into the Abyss as Biden's Plans Wither," *Washington Post*, January 17, 2022, https://www.washingtonpost.com/us-policy/2022/01/17/liberal-promises-biden-midterm/.

to receive the revamped child tax credit. Joe Manchin later insisted Democrats put it back in, echoing the party's past obsession with deservingness and social policy that reached a fever pitch in the 1990s with President Clinton.[610] The policies that survived this paired-back version of Build Back Better most intact were the provision of free preschool and items like the establishment of the Civilian Climate Corps, which the Green New Deal calls for. Had more of this inclusive design remained, rather than the adding of eligibility requirements and shrinking the scale and number of redistributive programs, insurgents' *direct* impact on the bill would be much greater.

The $1.75 trillion version of Build Back Better would make low-income workers without children eligible for a similar tax credit that their colleagues with parental responsibilities enjoy.[611] Interestingly, the Democratic Party's leftward movement largely has not changed its stances on taxation the way it has social policy. Foreshadowed by the party's decreasing support for progressive taxation in its platforms—in 2020, it was the lowest since 1992—in contrast to its increasing support for social policies, including some forms of means-tested social assistance, Build Back Better would only increase taxes on corporations and the über-wealthy to the already-low levels before the Trump administration's tax cuts for them.[612] Put differently, the post-Progressive Insurgency renascence of the Democratic Party's interest in redistributive social policies that would positively impact most Americans' lives and unabashed support for organized labor has not been coupled with a similar recommitment to the progressive taxes of its past.

This is not to say that even the whittled down $1.75 trillion version of Build Back Better is not significant Democratic Party policy. It is. But it is better evidence for the party's broader leftward movement—fought tooth and nail by Joe Manchin, whose elusive yet necessary Senate

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[610] Malpas and Hilton, "Retreating from Redistribution?"
[611] "President Biden Announces the Build Back Better Framework."
[612] Malpas and Hilton, "Retreating from Redistribution?"

vote was a primary cause of the bill's shrinkage—than the Progressive Insurgency's direct influence. The insurgency's direct influence was reduced in each subsequent stage of Build Back Better. It is very difficult to imagine that the scope, priorities, and principles of the Unity Task Force's recommendations, Biden's congressional speech policy proposals and the $3.5 trillion, and even $1.75, version of Build Back Better would be possible policy in the Democratic Party without Bernie Sanders's insurgencies and the Progressive Insurgency.

But, for the Progressive Insurgency's policy impact to be as direct in passed policy as it was in the early Build Back Better proposals while Democrats have such narrow majorities in the House and Senate, it would need to have won more seats in the House of Representatives and the Senate via the smaller branch of the movement aimed at that body. As it currently stands, the Progressive Insurgency is pushing the Democratic Party left but it is nowhere close to having enough elected members or influence on the rest of the party to pass strong insurgent policy like the Green New Deal.[613] And, as of the final revisions of this thesis, even the $1.75 trillion version of Build Back Better is effectively dead.[614] The ideas in these bills are unlikely to fade from the Democrats' agenda, but their opportunity to codify them into legislation that would materially improve millions of Americans' lives is likely to come to an end with the conclusion of the 117th Congress after the midterm elections later this year. Indeed, after the failure of Build Back Better due to *conservative* Democrats not the progressive insurgents, the likely general election climate, and fever-pitch culture war punditry, President Biden is tacking rightward in the second year of his presidency.[615] The political implications of Democrats' flirtation with ambitious social policy

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[613] Leifer and Shahid, "The Realigners."

[614] Stein, "The Left Dreamed of Remaking America. Now, It Stares into the Abyss as Biden's Plans Wither."

[615] Kate Aronoff, "The Climate Left Has a Tough New Pledge for Democrats," *The New Republic*, March 28, 2022, https://newrepublic.com/article/165865/alexandria-ocasio-cortez-ed-markey-tough-new-climate-pledge-midterm-candidates; Jonathan Weisman, "With a Center-Leaning Budget, Biden Bows to Political Reality," *The New York Times*, March 28, 2022, sec. U.S., https://www.nytimes.com/2022/03/28/us/politics/biden-budget-politics.html.

that they ultimately could not pass remain to be seen.

Insurgents' Perspectives on their Policy Impact on the Democratic Party

The Times They Are A-Changin'

> "[Bernie Sanders] might not be *the* president, but he's my president, and he's a generation's president. He set the policy tone for the entire conversation we're having. He was undoubtedly the central force pulling the spectrum to the left … I do think that the infrastructure budget reconciliation package reflects a great deal of [Ocasio-Cortez's] influence. Not her framing, not her scale, but just way beyond what we would have contemplated before and I give her a huge amount of credit for it," Shahid Buttar, 2018 and 2020 insurgent in CA-12.[616]

> "The Green New Deal is not impossible anymore. It's sitting on the floor of Congress. It's being debated by between Sunrise and Joe Biden. It's not inconceivable anymore to talk about Medicare for All. It's not inconceivable anymore to talk about UBI [universal basic income]. It's not inconceivable anymore to cut the military budget," Sarah Smith, 2018 insurgent in WA-09.[617]

Most, although certainly not all, insurgents perceive that the Progressive Insurgency to have moved the Democratic Party toward their policy stances in some ways.[618] As with other parts of the movement, they were quick to credit Bernie Sanders for starting it all. Beth Doglio, a 2020 challenger in WA-10 said, "I think Bernie Sanders's power … what he was able to do, and the movement he was able to create, has had an impact in pulling our policies further to the left."[619] Randy Bryce, a 2018 challenger in WI-01, put it in longer perspective with "how far we have come" with a $15 minimum wage and Medicare for All since he first heard Sanders talk about

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[616] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[617] Sarah Smith, interviewed by Amelia Malpas, June 29, 2021.
[618] Progressive insurgent interviews. To restate, I conducted these interviews in the summer-early fall of 2021 when Build Back Better was its fullest, $3.75 trillion version.
[619] Beth Doglio, interviewed by Amelia Malpas, August 19, 2021.

these policies. Bryce explained, "He was relentless. He was like, 'this is what people deserve. This is what we need.' I was just helping carry along that message [with my campaign]."[620] Sanders confirmed the importance of relentlessness in changing what Americans feel entitled to ask for from their government, like a living wage and single-payer health care. He sees it as not only normalizing these ideas among voters but also other Democratic elites.[621] Sanders's left policy influence on the Democratic Party as the catalyst of the political movement is indubitable. But the impact of his and similar ideas on the party has been greatly enhanced by the Progressive Insurgency—a legacy, in its own right, of his first campaign. That is, while Sanders made running as a Democrat on bold, progressive ideas possible, the Progressive Insurgency has kept these ideas at the center of the party's policy conversation and proposals, some of which have passed, with a vigor and persistence that likely would not exist if it were only Sanders.

The most concrete example of the Progressive Insurgency's impact on Democratic Party policy that insurgents pointed to was Representative Cori Bush's work to get President Joe Biden to extend the eviction moratorium in August 2021. Not only did Bush's organizing and actions extract policy concessions that made an immediate material difference in millions of Americans' lives, but moderate members of the party like Senate Majority Leader Chuck Schumer worked hard to ally themselves with her.[622] For Lauren Ashcraft, a 2020 challenger in NY-12, Bush's success was "really what it means to have working class people get in [to Congress]."[623] Shahid Buttar, a 2018 and 2020 insurgent in CA-12, expanded on Bush's influential tactics, "She demonstrates, as AOC did with the sit-in at Pelosi's office when she first went to Washington, the value of direct action wielded by a progressive legislator. In both cases, they got the goods made.

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[620] Randy Bryce, interviewed by Amelia Malpas, September 13, 2021.
[621] Bernie Sanders, interviewed by Amelia Malpas, April 4, 2022.
[622] Progressive insurgent interviews; Chávez, "Progressives Want to Put Medicare for All Back on the Table."
[623] Lauren Ashcraft, interviewed by Amelia Malpas, September 17, 2021.

AOC didn't win the Green New Deal. She didn't get her committee assignment. But there's a whole country talking about it now."[624]

Others see the insurgency as exerting influence on the Democratic Party's policy broadly, exemplified by the first six months of the Biden administration. Qasim Rashid, a 2020 challenger in VA-01, gave a sweeping overview of the way the Progressive Insurgency has "already" changed the party's policy "on many levels. Look at the look at the child tax credit that people are getting right now. Look at Cori Bush on the Capitol steps when she was protesting the evictions moratorium. Look at the greater emphasis on the Green New Deal and climate change in the infrastructure package in the budget reconciliation package."[625] JD Scholten, a 2018 and 2020 insurgent in IA-04, said the evidence is in "what's happening right now. Today in DC the fight's not between Bernie and Joe Manchin, the fight is between Joe Biden's agenda and Joe Manchin. Who would have thought that, even two years ago. The policies are extremely popular."[626] Others see parts of the American Rescue Plan and the traces of the Green New Deal in the party's passed physical infrastructure and stalled Build Back Better bills as evidence of this change.[627]

The presence of insurgents' priorities in the Democratic Party's proposed and passed legislation has been bolstered by the new strength of the congressional Progressive Caucus, which is due at least in part to the infusion of elected insurgents into its ranks. Jason Call stated that "we added four actual progressives. One of the problems is that we've got this 100-member Progressive Caucus, where only a dozen people are actually progressive" and acting with urgency.[628] Still, few as they still number in the Progressive Caucus, insurgents' presence is enough to start to change

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[624] Shahid Buttar, interviewed by Amelia Malpas, August 23-4, 2021.
[625] Qasim Rashid, interviewed by Amelia Malpas, September 15, 2021.
[626] JD Scholten, interviewed by Amelia Malpas, September 13, 2021; See, for example, Sean McElwee, "A Recap You Didn't Need: Build Back Better Was Popular All Year," *Data For Progress*, December 23, 2021, https://www.dataforprogress.org/blog/2021/12/23/build-back-better-was-popular-all-year.
[627] Progressive insurgent interviews.
[628] Jason Call, interviewed by Amelia Malpas, August 10, 2021.

the caucus's power. This created new intraparty dynamics, where the caucus even had Speaker of the House Nancy Pelosi support their bargaining strategy for passing Build Back Better for a few months. Morgan Harper, a 2020 challenger in OH-03, explained, "That only happens when that caucus becomes bigger, more organized, and more coordinated."[629] The Progressive Caucus still does not have anything close to the amount of veto power over party leadership as the Tea Party's Freedom Caucus did over the Republican Party.[630] But, it is starting to have real power—seen in its newfound strategy of not compromising on policy ahead of time and holding the line to maximize its leverage.

Breadcrumbs on a Burning Planet

> "Our greatest contribution as progressive challengers is to the public discourse," Liam O'Mara, 2020 insurgent in CA-42.[631]

> "I don't know [about the insurgency's impact]. I think that we're up against history. I think we're up against time. And I think we're up against institutions that were designed not to be transformed quickly," Mel Gagarin, 2020 insurgent in NY-06.[632]

> "I'm glad [the Democrats] are doing something. But it's nothing in terms of the real changes that we need. It's nothing," Jason Call, 2020 insurgent in WA-02.[633]

While some insurgents do not think that their movement has had any impact on the Democratic Party, a majority see the Progressive Insurgency as changing the party's policy just not on the

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[629] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.
[630] Ruth Bloch Rubin, "Organizing at the Extreme: Hardline Strategy and Institutional Design," *Congress & the Presidency* (2021): 1–41; Leifer and Shahid, "The Realigners." Elected progressive insurgents have yet to start a new hardline ideological caucus as the Tea Party did. Instead, their influx into the Progressive Caucus has given it more muscle, organization, and willingness to use its leverage. This large, nearly 100-member, "majoritarian" caucus has fundamentally different strategies and tools at its disposal than one of the Tea Party's small, highly-organized, "minoritarian" ones
[631] Liam O'Mara, interviewed by Amelia Malpas, August 3, 2021.
[632] Mel Gagarin, interviewed by Amelia Malpas, September 17, 2021.
[633] Jason Call, interviewed by Amelia Malpas, August 10, 2021.

scale, depth, or pace required to solve present crises.[634] Challengers understood their movement's impact on the Democratic Party as primarily rhetorical: their influence on the party's policy conversation is where they have really "won."[635] That is, the Progressive Insurgency has shifted the Overton window leftward but it has not translated to material change along the lines of the passage of Medicare for All during the worst pandemic in a century.[636]

Insurgents in Republican districts see a disconnect between the popularity of progressive policies among voters and Democrats' electoral performance nationwide.[637] "I sometimes feel like Democrats don't actually want to win. Look at what's happening in our country right now. There are things that the Democrats could do to help [that they are not]," Julie Oliver, a 2018 and 2020 insurgent in TX-25, said. "There is no cohesive message that Democrats put out that is digestible and easy to understand. You look at the 2020 election and there were so many progressive policies that outperformed Biden and Democrats everywhere. For whatever reason, people are not connecting a $15 minimum wage with Democrats."[638] JD Scholten, a 2018 and 2020 challenger in IA-04, elaborated, "The majority of progressive policies are extremely popular, even in Republican areas. There's Medicaid expansion in Utah, Nebraska, and Idaho. Voters passed a $15 minimum wage in Florida, workers' rights in Missouri, marijuana in South Dakota. So we're right on policies. I don't think we're right on politics right now: the Democratic brand is very tarnished."[639] That is, the Democratic Party did worse than insurgent ideas at the ballot box. The Democratic Party should know by now, Randy Bryce of WI-01 said, that regardless of their policy if "you're

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[634] Progressive insurgent interviews. A few challengers even brought up how the opposite has happened: the Democratic Party and being in Congress has changed the policy of the Squad and other elected insurgents. While this is no doubt true, it is simplistic to say that they have been coopted by the centrist wing of the party.

[635] Roza Calderón, interviewed by Amelia Malpas, August 20, 2021; Progressive insurgent interviews.

[636] Progressive insurgent interviews.

[637] Ibid.

[638] Julie Oliver, interviewed by Amelia Malpas, September 10, 2021.

[639] JD Scholten, interviewed by Amelia Malpas, September 13, 2021.

a Democrat, you're going to get called a socialist anyway."[640] They might as well help people while they are at it.

Many Democrats in Congress, the insurgents ascertained, are simply not acting with the urgency required of the moment even if they have acceded to some insurgent positions. Laura Moser, a 2018 insurgent in TX-07, explained, "I think for a lot of Democrats, Nancy Pelosi is the perfect symbol, nothing's at stake for her. She doesn't know what it's like to not have health insurance or she doesn't know anyone who doesn't have health insurance."[641] Brent Welder was looking forward to being "a real aggressive fighter for regular people" in Congress; he saw few Democrats outside of the elected insurgents as doing so, despite some of their left-inspired rhetoric, in contrast to the emotional urgency from voters' insecurity that many Republican members of Congress harness.[642] Some of the urgency that insurgents have that they perceive establishment Democrats to lack comes from the generational, class, and racial inflection of many of the United States' most urgent crises. Shaniyat Chowdhury, a 2020 challenger in NY-05, put it, "How much more do young people have to wait to make a difference in this country when climate change is impacting us today, college debt is impacting us today, a lack of health care is impacting us today. We have a sense of action that we have to do this now because we can't wait any longer."[643] Another challenger saw the Democratic Party being remade in the image of the insurgency as "inevitable" but years away given the party's resistance, which the planet cannot afford. She said, "Hopefully it's before the Pacific Northwest burns down."[644]

Insurgents, therefore, see the Progressive Insurgency as overall changing the Democratic

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[640] Randy Bryce, interviewed by Amelia Malpas, September 13, 2021.
[641] Laura Moser, interviewed by Amelia Malpas, September 24, 2021.
[642] Brent Welder, interviewed by Amelia Malpas, September 21, 2021.
[643] Shaniyat Chowdhury, interviewed by Amelia Malpas, August 24, 2021.
[644] Progressive insurgent interviews.

Party's policy priorities but too "incrementally" to lessen Americans' suffering now and in the future that will result from policy inaction today.[645] For some, the "breadcrumbs" of policy influence the insurgency has won are too scaled down to count as a real victory. But really, as Eva Putzova, a 2020 challenger in AZ-01, put it, the problem is that Democratic Party change is "not happening quick enough to save lives, to get people out of poverty, and certainly not quick enough to do anything about climate change."[646] Morgan Harper, a 2020 insurgent in OH-03, phrased the stakes differently, "we're in a very scary time for our country right now. But we're also in a beautiful time of political possibility. That only happens when folks realize we've hit rock bottom. So we have to accelerate everything that's happening right now. We've got to have more people in the fight."[647]

Conclusion

Making use of data from a wide variety of sources, from tweets to congressional legislation to insurgent interviews, this chapter has explored the Progressive Insurgency's impact on the Democratic Party's policy. It argues that the insurgency's greatest influence is on the party's policy conversation and its proposed policy and the weakest on its passed policy, best seen in Biden's Build Back Better. It finds that most Democrats' communications about insurgent policies were endorsements rather than criticisms and nearly all who communicated about their support also cosponsored the legislation. Nearly every member of the 116th and 117th Congresses, inclusive of both Democrats and Republicans, cosponsored at least one insurgent-sponsored bill. Insurgents' challenges have had a greater impact on incumbents' total number of communications than on the

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[645] Progressive insurgent interviews.
[646] Eva Putzova, interviewed by Amelia Malpas, July 23, 2021.
[647] Morgan Harper, interviewed by Amelia Malpas, October 18, 2021.

total number of insurgent bills they cosponsor, although their challenges have led incumbents to substantially increase the proportion of insurgent bills they cosponsor. Most insurgents reported that the incumbent they primaried coopted some of their policies. Insurgent ideas in President Biden's signature Build Back Better bill were strong in early proposals, before falling along with the bill's prospects. Because of this, many insurgents saw some party change but not on the scale required of the moment. The Progressive Insurgency has been moderately successful, which the following conclusion contextualizes via a comparative test of insurgency.

Conclusion

There Still Isn't Really a Tea Party of the Left:

Comparing Insurgencies and Looking Forward

> "If [being a Tea Party of the left] means that we c[a]me out of nowhere and, within a few years, we have one of the two major parties implementing our agenda—and if our agenda is to promote multiracial democracy and give people union jobs and help avert a climate crisis—then, yeah, I'm down to be the Tea Party of the left," Max Berger, early employee of Justice Democrats, on the Progressive Insurgency.[648]

> "What people don't realize is that there is a Tea Party of the left, but it's on the right edges, the most conservative parts of the Democratic Party," Representative Alexandria Ocasio-Cortez on the Progressive Insurgency's tactics within Congress compared to other Democrats'.[649]

> "We still have, what, 429 seats to go?" Angelica Dueñas, 2020 insurgent in CA-29, on the future of the Progressive Insurgency.[650]

Recapitulating the Findings and Argument

This thesis has put forth a theory of insurgency and insurgent-driven party change and explored a series of empirical questions pertaining to the internal dynamics of the Progressive Insurgency, the determinants of its candidates' electoral success, and its policy impact on the Democratic Party.

It finds that the Progressive Insurgency emerged following Bernie Sanders's first presidential bid and aims to reorient the Democratic Party's policy priorities and through that, the broader American political terrain. The movement is largely cohesive in its policy agenda,

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[648] Marantz, "Are We Entering a New Political Era?"
[649] Forgey, "AOC: 'In Any Other Country, Joe Biden and I Would Not Be in the Same Party.'"
[650] Angelica Dueñas, interviewed by Amelia Malpas, June 30, 2021.

campaign infrastructure, and electoral strategies—including its dependency on unpaid campaign labor. How contentious insurgents' relationship to the Democratic Party is depends on the Democratic Party's institutional and electoral strength in the district, which also greatly influence what factors are most impactful on insurgents' primary election vote share. While these, and insurgents' rates of primary and general election victory, vary by the type of district, the significant factors primarily concern the quality of the insurgent, such as their endorsements and fundraising, rather than the district or the incumbent. A substantial number of Democratic incumbents were threatened by the insurgent's primary challenge. Challenged incumbents largely modified their communications about and increased their cosponsorship of insurgent policies. The Progressive Insurgency has influenced the Democratic Party's policy conversation and policy proposals much more than its passed policy, as illustrated by the rise and fall of both the insurgent ideas in and prospects of Biden's signature Build Back Better social policy bill.

Based on these findings, I argue that the efficacy of insurgency comes from its simultaneous institutional and ideological challenge to its host party, which allows insurgents to change politics without winning election, and that, measured by its rate of electoral victory and policy impact on the Democratic Party, the Progressive Insurgency has been moderately successful. While the insurgency has not fully taken over the party and only 8% of its candidates have won election to the House, it has pushed the party left more effectively than any other force in its recent past.

Following the theoretical and empirical contributions of the previous chapters, this chapter adds two final insights to this study. First, it tests my theory of insurgency and insurgent-driven party change through a comparison of the Progressive Insurgency to the Tea Party and Green Party. And second, it contextualizes the Progressive Insurgency in the House with other post-2016

progressive insurgencies and offers hypotheses on the insurgency's evolving dynamics.

A Test of Insurgency: Comparing the Progressive Insurgency to the Tea and Green Parties

To test my theory of insurgency and insurgent-driven party change, I first compare the success of the Progressive Insurgency to that of the Tea Party. As both political movements are insurgencies within the major party closest to their politics, the comparison follows the defining points of my theory of these phenomena. To fully evaluate my theoretical framework, I also compare the Progressive Insurgency with the Green Party, which did not become an intraparty insurgency despite being in an institutional context where third parties face very high barriers to entry. This test of this thesis's theoretical framework helps to explain the wildly varying degrees of electoral success and policy impact of the Tea Party, the Progressive Insurgency, and the Green Party.

The Tea Party was spectacularly successful electorally and in changing the Republican Party's policy, the Progressive Insurgency has been moderately successful electorally and in changing the Democratic Party's policy, and the Green Party has been unsuccessful electorally and muted in its policy impact. This comparison reveals that are many similarities between the Tea Party and the Progressive Insurgency, including the broad distribution of where their candidates challenge their host party based on its institutional and electoral strength, their willingness to lose elections for principles, and their advantageous use of host party weakness to advance. Their greatest differences are in relation to their number of congressional candidates, their orientation to the dominant political order, and their financial resources and media support from their insurgent infrastructure. The two insurgencies defeated a similar number of incumbents at their start and both elevated insurgent groups within their parties. However, they had disparate rates of turnover (especially in effecting it *between* the parties in general elections) and degrees of combativeness

with their party. They also differed in their ability to provide their host party with additional incentives to coopt their policy from flipping seats, convincing their party's elite to see their insurgency as electorally beneficial, and bringing new constituencies into their party's electoral base. Other factors outside of the insurgencies' control, like the constitutional design of Congress and their party's history, also impacted their different rates of success. Last, unlike the Tea Party or the Progressive Insurgency, the Green Party is not an intraparty insurgency, which has greatly hindered its ability to win elections and influence Democrats' policy and American politics.

A Tale of Two Insurgencies: Comparing the Progressive Insurgency to the Tea Party

This thesis has studied the Progressive Insurgency without directly discussing the Tea Party, in many ways its closest parallel. The Tea Party was a radical right insurgency within the Republican Party that started in early 2009. It mobilized in response to the United States' election of its first Black president, Democrats' aid to "undeserving" Americans in their Great Recession bailout, and conservative Republicans' unhappiness with George Bush's presidency.[651] It would become one of the most influential political movements of the early 21st century, transforming the Republican Party and American politics in a matter of years. Both the Tea Party and Progressive Insurgency have targeted Congress, specifically the House of Representatives, in sustained, semi-coordinated movements, although there are branches of both insurgencies aimed at state and local governments and linked presidential insurgencies.

An institutional challenge to a host party is half of the defining quality of insurgency, but not all challenges are the same. The type of district, based on the party's institutional and electoral strength, where an insurgency challenges its host party in primary elections can change as it

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[651] Ronald P. Formisano, *The Tea Party: A Brief History* (Baltimore: Johns Hopkins University Press, 2012).

evolves, as it did with both the Tea Party and the Progressive Insurgency. While the Tea Party primaried Republican incumbents whom it saw as insufficiently conservative and fielded candidates in open Republican districts, most of its first candidates ran in districts far less conducive to Republicans' general election success but where it was much easier for them to win primary elections.[652] Of its roughly 135 primary victors in 2010, 67% ran in strongly Democratic or Democratic-leaning districts, 18% ran in toss-up races, and 14% ran in strong Republican seats—a strikingly similar distribution across districts to the Progressive Insurgency.[653] In subsequent electoral cycles, the Tea Party shifted toward targeting more incumbent Republicans and running in swing seats.[654]

Where the Progressive Insurgency has institutionally challenged the Democratic Party has also changed as the movement has matured. In its first year in 2018, 46% of its roughly 100 candidates ran in strong Republican districts, 28% ran in swing seats, 10% ran in open Democratic seats, and 16% primaried Democratic incumbents: only a quarter ran for strongly Democratic seats, with even fewer challenging the Democratic Party in the most direct way. Forty-one candidates won their primaries in 2018, primarily in Republican and swing seats. Paralleling the Tea Party, the Progressive Insurgency moved toward greater direct contestation with the Democratic Party in its second electoral cycle: 52% of candidates primaried a Democratic incumbent, 12% ran in open

[652] Blum, *How the Tea Party Captured the GOP*; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Formisano, *The Tea Party*.

[653] Zachary Courser, "The Tea Party at the Election," *The Forum* 8, no. 4 (2011); "How the Tea Party Fared," *The New York Times*, November 4, 2010, http://archive.nytimes.com/www.nytimes.com/interactive/2010/11/04/us/politics/tea-party-results.html?_r=0; Joseph Lowndes, "Perspective | Far-Right Extremism Dominates the GOP. It Didn't Start — and Won't End — with Trump," *Washington Post*, November 8, 2021, https://www.washingtonpost.com/outlook/2021/11/08/far-right-extremism-dominates-gop-it-didnt-start-wont-end-with-trump/. I only have an approximate a breakdown of where Tea Party candidates ran in their first electoral cycles, based on other scholars' measurements of Republican candidates' Tea Party status. I could not find data on all Tea Party primary candidates, but only those who advanced to the general election.

[654] Blum, *How the Tea Party Captured the GOP*.

Democratic districts, 8% ran in swing seats, and 26% ran in Republican seats. Not only did nearly

two-thirds run in safe Democratic seats, but the proportion of candidates challenging incumbents

versus those running where the party is weakest is nearly a perfect inverse from its first year.

Twenty-nine of these candidates won their primaries. Progressive insurgents targeted roughly the

same number of liberal and moderate/conservative Democrats. Thus, as they matured, both the

Progressive Insurgency and the Tea Party became more electorally combative with their respective

host parties. But the sizes of the two political movements were not equal: the Tea Party had nearly

100 more candidates win their primaries across all types of districts at its start than did the

Progressive Insurgency.

Equally important as their institutional challenge is insurgents' simultaneous ideological

challenge to their host party. Candidates within both ideological insurgencies have taken principled

stances that likely lessened their chances of election, although what that principled behavior looks

like varies between them. Tea Partiers did not moderate their agenda to increase their chances of

victory, even if it meant losing to a Democrat: in the 2010 midterm election, for example, several

lost races that an establishment Republican likely would have won.[655] The Tea Party's policy

stances were far to the right of the Republican elite but not the party's electoral base, which was

likely instrumental in their rapid rise (dynamics that would be repeated with Donald Trump's

presidential insurgency in 2016). Their policy objectives included restricting federal spending—

especially if it would aid racialized "unproductive" and "undeserving" Americans, lessening taxes,

repealing Obama's Affordable Care Act, and generally preventing the government from modifying

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[655] Blum, *How the Tea Party Captured the GOP*; Lawrence Rosenthal and Christine Trost, "Introduction: The Rise of the Tea Party," in *Steep: The Precipitous Rise of the Tea Party*, ed. Lawrence Rosenthal and Christine Trost (Berkeley: University of California Press, 2012), 1–22; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.

any outcome of private markets.[656] Broadly, theirs was a politics of first implicitly and then explicitly racial reaction and resentment.[657] In contrast, as part of their ideological challenge to the Democratic Party, most progressive insurgents explicitly forwent particular forms of funding, such as PAC contributions, in addition to not moderating their progressive platforms. Such decisions likely hurt their vote share, especially in primary elections in swing seats. Their primary policy priorities are to the left of the elite of the Democratic Party and include passing universal social policies, especially regarding health care and education, strengthening organized labor, increasing the progressivity of individual and corporate tax rates, and mitigating climate change—many of which are supported by the Democratic base. Both movements comprised ideological insurgents more committed to their political ideas than their own personal victory or that of their host party.

Both insurgencies aimed to change their host parties' overarching ideological orientation, issue salience, and prioritization of interests, and through that, the broader American political terrain or dominant political order. One of the greatest differences between the two insurgencies is their orientation to the existing neoliberal one.[658] The Tea Party did not challenge the broad ideological principles and institutional relationships of this order; rather the insurgency sees it as having been ideologically corrupted and wishes to return to the purity of its Reaganite founding. While the Tea Party is known for its bombastic critique of politicians, including many Republicans, Ronald Reagan is one of the few spared from its ire.[659] This exceptional admiration for the president credited with the ushering in of the current dominant order is strongly suggestive of the insurgency's orientation toward it. The Progressive Insurgency, on the other hand, aims to

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[656] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Formisano, *The Tea Party*.
[657] Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.
[658] Hilton, "The Politics Insurgents Make."
[659] Don Gonyea, "Ronald Reagan: The 'Original Tea Party Candidate,'" *NPR*, February 5, 2011, sec. Politics, https://www.npr.org/2011/02/05/133506347/ronald-reagan-the-original-tea-party-candidate.

inaugurate a redistributionist, egalitarian, social-democratic regime and sees Democrats' acceptance of neoliberal principles and logics—particularly its replacement of government intervention with veneration of the free market—in the 1990s as some of the party's most glaring failures of the last decades.

These opposite orientations lead the insurgencies to different stances on whether or not they need to change and expand their host party's electoral base. Aiming to return to the Reagan revolution that founded the neoliberal order, the Tea Party overall did not articulate a new coalitional basis for the Republican Party. In contrast, the Progressive Insurgency has articulated an expanded Democratic base to deliver the Democratic dominance needed for such a development. They view the multiracial working class as the core of their new base and understand organizing white workers who currently vote Republican, politically-apathetic workers of all races, Americans with populist economic views, and young people as key to its expansion.

Both insurgencies struck their host parties when they had recently suffered in national or state-level elections, taking advantage of this weakness and elites' disagreement about how to electorally reinvigorate their party to advance. For the Tea Party, this was the successive national Republican losses in the 2006 midterms and 2008 presidential election, where Democrats won the presidency with the election of Barack Obama as well as a 60-seat Senate majority.[660] For the Progressive Insurgency, this was presidential nominee Hillary Clinton's shock loss to Donald Trump after her surprisingly narrow primary victory over Bernie Sanders, which came after massive state-level Democratic losses during the Obama presidency. Both movements gained electoral support from members of their party bases who were disillusioned with their party's last presidency and saw it as at least partially liable for the party's recent losses. That is, not only were

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[660] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Formisano, *The Tea Party*; Rosenthal and Trost, "Introduction: The Rise of the Tea Party."

Tea Party voters animated by their intense dislike of newly-elected President Obama and fear of status loss, but by their unhappiness with George Bush's presidency.[661] The Progressive Insurgency, meanwhile, mobilized in response to Sanders's loss as well as their perception of the failures of the Obama administration, especially its Great Recession legislation, and the contrast between his governance and progressive image as a candidate. These conditions in both the Republican and Democratic parties created spaces for the two insurgencies to advance within them that they otherwise would not have had.

The Progressive Insurgency and Tea Party both have strong relationships to social movements and are reliant on extra-party insurgent infrastructure, but the exact nature of these relationships differs, especially when it comes to resource exchanges. The Tea Party was animated by adherents of various existing conservative movements, from libertarians who emphasized economic conservatism to the Christian Right who emphasized cultural and social conservatism.[662] The Tea Party was an amalgam of a grassroots movement, an elite coordinated and funded movement, and an electoral insurgency that proved potent.[663] The Progressive Insurgency has close connections with movements for environmental, economic, and racial justice, but there is no distinct social movement so dedicated to its candidates.

The greatest difference between the two insurgencies is their insurgent infrastructure. The Tea Party network comprises "a multimillion-dollar complex that includes for-profit corporations, nonparty nonprofit organizations, and PACs."[664] Multiple scholars have identified six core

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[661] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Van Dyke and Meyer, "Introduction."

[662] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.

[663] Devin Burghart, "View from the Top: Report on Six National Tea Party Organizations," in *Steep: The Precipitous Rise of the Tea Party*, ed. Lawrence Rosenthal and Christine Trost (Berkeley: University of California Press, 2012), 67–97; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Parker and Barreto, *Change They Can't Believe In*; Kriesi, "Party Systems, Electoral Systems, and Social Movements."

[664] Burghart, "View from the Top," 67.

organizations in Tea Party infrastructure (in addition to other peripheral organizations), which have competing but interrelated primary objectives and offer different kinds of resources.[665] The Tea Party Nation was a new organization, with several thousand local chapters. It was the most grassroots of the insurgency's core groups and neither raised nor spent large sums of money on candidates. In contrast, Republican operatives refashioned groups like FreedomWorks and the Tea Party Express to aid the insurgency from preexisting groups in the Republican orbit—the Tea Party Express, for example, came out of a PAC to support John McCain's 2008 presidential bid. These organizations' leaders included former Republican politicians: they were already close to power within the party. These elite groups spent vast resources to kickstart the mobilization of the Tea Party movement and aid its candidates.[666] While the movement as a whole was fairly decentralized without a single infrastructural center to coordinate efforts, these elite groups were savvy in where they channeled resources. This is not to incorrectly imply that all Tea Party candidates were well-funded, but substantial elite funding played an important role in the Tea Party's meteoric rise.[667]

A critical component of the Tea Party's infrastructure was Fox News and other outlets in the rightwing media ecosystem. Fox acted like an arm of the social movement through its positive coverage of its early protests and encouragement of its viewers to join them.[668] Further, Fox News's near-total allegiance to the Tea Party predates its current commitment to the Republican

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[665] Burghart, "View from the Top"; Tina Fetner and Brayden G. King, "Three-Layer Movements, Resources, and the Tea Party," in *Understanding the Tea Party Movement*, ed. Nella Van Dyke and David S. Meyer (Milton Park, UK: Routledge, 2014), 35–54; Formisano, *The Tea Party*; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.

[666] Jane Mayer, *Dark Money: The Hidden History of the Billionaires Behind the Rise of the Radical Right* (New York: Anchor Books, 2017); Burghart, "View from the Top"; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Formisano, *The Tea Party*.

[667] Andrew D. McNitt, "The Tea Party Movement and the 2012 House Election," *PS: Political Science & Politics* 47, no. 4 (2014): 799–805; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Formisano, *The Tea Party*.

[668] Formisano, *The Tea Party*; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Rosenthal and Trost, "Introduction: The Rise of the Tea Party."

Party: it was through the Tea Party's successful contestation within the Republican Party that Fox News became wholly committed to the host party.[669] This succeeds a long history of rightwing media activism beginning in the 1930s and accelerating in the 1970s, whose leaders justified building separate conservative—often hyper-conservative—media institutions that used their own sets of facts through manufacturing allegations that the existing media were biased toward the left.[670] Summarizing the Tea Party's unusual level of support from monied interests and established political actors, Nella Van Dyke and David Meyer write that "unlike most progressive movements, which gathered their resources from their own constituents and battled for a voice in a media, the Tea Party has enjoyed an unusual level of support from powerful economic and cultural actors."[671]

The Progressive Insurgency similarly relied on core and peripheral insurgent groups that either long preceded or emerged alongside the movement. These groups likewise vary in where they fall along the elite-grassroots spectrum. Membership-based groups like Sunrise and the Democratic Socialists of America are among the insurgency's more grassroots organizations, while professional organizations like Justice Democrats and Brand New Congress (that were formed by Sanders's 2016 staff to continue to the movement) attract, concentrate, and channel supporter resources to insurgent candidates. Others like the core Working Families Party or peripheral Progressive Democrats of America worked at the edge of or within the Democratic Party for over a decade before the insurgency. These groups' resources pale in comparison to those at the disposal of the Tea Party—and many of the insurgents would not accept their, or any, PAC money even if they offered it. The insurgency has also enjoyed the support from left independent

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[669] Fetner and King, "Three-Layer Movements, Resources, and the Tea Party."
[670] Nicole Hemmer, *Messengers of the Right: Conservative Media and the Transformation of American Politics* (Philadelphia: University of Pennsylvania Press, 2016); Mayer, *Dark Money*.
[671] Van Dyke and Meyer, "Introduction," 6.

media, but there is no parallel to unconditional support from an outlet with the reach of Fox News. Indeed, not just the two insurgencies but the Democratic and Republican parties have asymmetrical media ecosystems that differ in their degrees of support and criticism of their policies.[672]

Both the Tea Party and the Progressive Insurgency began by challenging their host party at its weakest, were willing to lose elections for principles, and exploited their host party's weakness and disagreement to make inroads in it. The Tea Party had substantially more candidates than the Progressive Insurgency and aimed to return to the founding of the dominant political order rather than replace it. The Tea Party enjoyed much greater financial resources and media support from its core extra-party infrastructure than the Progressive Insurgency, which has great implications for its electoral success and ability to change its host party's politics.

Different Degrees of Party Change: Comparing the Progressive Insurgency to the Tea Party

The above comparison of the two insurgencies suggests that they would have different levels of outright electoral success. Insurgent victory over an incumbent in a primary election is party change through turnover. For movements aimed at Congress or lower levels of government, at least one instance of insurgent defeat of an incumbent is a requisite for all other forms of insurgent-driven party change as it heightens the threat of insurgency for incumbents. In its first year, aided by insurgent infrastructure and grassroots enthusiasm, two Tea Party candidates won their primaries against establishment Republicans.[673] In their first general elections, 44-52 Tea Party

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[672] Hemmer, *Messengers of the Right*; Jonathan Chait, "Why the Media Is Worse for Biden Than Trump," *Intelligencer*, August 26, 2021, https://nymag.com/intelligencer/2021/08/why-the-media-is-worse-for-biden-than-trump.html.

[673] Kiran Dhillon, "Before Cantor: Seven Other Tea Party Upsets," *Time*, June 12, 2014, https://time.com/2864303/before-cantor-seven-other-tea-party-upsets/; "How the Tea Party Fared"; Formisano, *The Tea Party*; Jamie L. Carson and Stephen Pettigrew, "Strategic Politicians, Partisan Roll Calls, and the Tea Party: Evaluating the 2010 Midterm Elections," *Electoral Studies* 32, no. 1 (2013): 26–36.

candidates (depending on the quantification) won election to the House of Representatives, roughly a third of its primary victors.[674] Most of these winning candidates ran in open or Democrat-held swing seats, flipping the seat in the general election.[675] Well over half of the total incoming Republican members of Congress (not just those who flipped seats) after the 2010 elections were Tea Partiers. Tea Party candidates did not do as well in the 2012 elections, although they continued primarying Republicans and winning some elections.[676] In the 2014 elections, a Tea Party candidate successfully primaried Republican House Majority Leader Eric Cantor, the insurgency's greatest electoral victory. In short, especially in their first election, Tea Party candidates were remarkably successful in winning election to Congress. Although only a few candidates defeated incumbents in primaries, the combination of this with the Tea Party's high number of flipped seats resulted in a high level of insurgent-driven party change via turnover.

The Progressive Insurgency has not been as successful. In its first election cycle, two candidates defeated incumbents in primaries, like the Tea Party. A total of nine progressive insurgents won election to the House of Representatives in the general election, which is 22% of the insurgency's primary election victors. Two of these victorious insurgents flipped seats. In the 2018 midterms, progressive insurgents accounted for 15% of the total incoming Democratic members of Congress.[677] Its success in its second electoral cycle was similar. Progressive insurgents defeated a few Democratic incumbents and won a handful of other races for a low-to-

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[674] Lowndes, "Perspective | Far-Right Extremism Dominates the GOP. It Didn't Start — and Won't End — with Trump"; Paul Almeida and Nella Van Dyke, "Social Movement Partyism and the Tea Party's Rapid Mobilization," in *Understanding the Tea Party Movement*, ed. Nella Van Dyke and David S. Meyer (Milton Park, UK: Routledge, 2014), 55–72; Formisano, *The Tea Party*.

[675] "How the Tea Party Fared."

[676] Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*; Dhillon, "Before Cantor."

[677] Catie Edmondson and Jasmine C. Lee, "Meet the New Freshmen in Congress," *The New York Times*, November 28, 2018, sec. U.S., https://www.nytimes.com/interactive/2018/11/28/us/politics/congress-freshman-class.html, https://www.nytimes.com/interactive/2018/11/28/us/politics/congress-freshman-class.html.

moderate rate of turnover.

After insurgents in a sustained, semi-coordinated movements defeat incumbents in primary elections, other incumbents may try to preempt a future insurgent challenge through coopting their policy. The threat of insurgents' institutional challenge as well as softer incentives that accompany insurgent success incentivize incumbent cooptation. The Tea Party was enormously electorally successful when the Republican Party had recently suffered major losses and its elite were divided on how to recover. Tea Party candidates flipped about 30 seats, showing that their brand of politics could help Republicans win districts that had previously elected Democrats.[678] Many observers credit Tea Party candidates and supporter energy in the electorate with the Republicans' historic gains in the 2010 midterm election; critically, establishment Republicans likewise saw the insurgency as benefitting them electorally.[679] This party enthusiasm was likely heightened by the increased fragility of neoliberal order in the aftermath of the 2008 financial crisis, and establishment Republicans' role in its creation. It did not take long for a majority of Republican congressional members to either have received support from Tea Party organizations or attached themselves to the insurgency through showing their support through rally speeches and social media posts.[680]

The Tea Party's rise within the Republican Party also elevated the insurgent groups that gave them critical infrastructure and resources, including mobilized activists, offering incumbents further incentives to adopt Tea Party policy positions.[681] Finally, of great consequence for the

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[678] "How the Tea Party Fared."

[679] Formisano, *The Tea Party*; Rosenthal and Trost, "Introduction: The Rise of the Tea Party"; Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Courser, "The Tea Party at the Election"; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*; Jewitt and Treul, "Ideological Primary Competition and Congressional Behavior"; Kriesi, "Party Systems, Electoral Systems, and Social Movements."

[680] Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.

[681] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*.

Republican Party's subsequent trajectory, the Tea Party's racial politics brought white nationalists into the insurgency and then into the Republican Party through the insurgency, even though its candidates had not tried to expand the party's electoral coalition. [682] Through this, the Tea Party gained great concessions from establishment Republicans and transformed the party in a matter of years. The Republican Party coopted Tea Party ideas under pressure from the insurgency's institutional contestation, the "stick," and because of the insurgency's successful activation of all the other "carrot" incentives to do so. Its creation of all possible extra incentives for establishment Republicans to coopt its policy was essential for the rapidity of the Republican Party's change.

In contrast, the Progressive Insurgency did not activate all of these additional incentives for establishment Democrats to coopt its policy. As such, the level of Democratic Party cooptation of progressive insurgent policy has been much lower than the Republican Party's cooptation of Tea Party policy. Although it defeated as many incumbents in its first year as the Tea Party, the Progressive Insurgency elected significantly fewer members to the House of Representatives and had a much smaller impact the Democratic Party's electoral fortunes in its first year than the Tea Party did for the Republican Party. It has flipped only two seats, compared to the roughly 30 seats that the Tea Party flipped at its start. The Democratic Party's recognition of the insurgency's social democratic appeal is mixed. On the one hand, most establishment Democrats did not see the insurgency as benefitting their party electorally in a major way, so incumbent cooptation was not accelerated by members' understanding that insurgent policy could remedy their woes. On the other hand, the first Democratic president since the Progressive Insurgency began came into office rhetorically promising an "FDR-style" presidency, which alludes to the historical inauguration of

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[682] Richard C. Fording and Sanford F. Schram, *Hard White: The Mainstreaming of Racism in American Politics* (New York: Oxford University Press, 2020).

a new dominant order and seems to recognize some of the failings of the current one.[683] But the Democratic Party's new boldness faded to timidity when it was short of a handful votes for its remarkably ambitious, insurgent idea-inflected Build Back Better bill that deviated in significant ways from past neoliberal policy design.[684] Still faced with these constraints, and several conservative members' obstinance and obstruction, Democrats' ambition has yet to rebound.[685]

The Progressive Insurgency has elevated some of its core extra-party groups within the Democratic Party. These organizations offer new financial and grassroots resources to incumbents who adopt insurgent policy, further incentivizing them to do so. Finally, while the insurgency has conceptualized a broadened Democratic Party base whom they prioritize in their policies, they have not brought in a critical new constituency who establishment Democrats try to maintain via espousing insurgent policy. It has, however, made support of some of its key policies assets rather than liabilities for establishment members seeking reelection.

In addition to policy change, insurgents can also prompt the establishment of their host party to retaliate against their challenges or overemphasize their political proximity to the insurgents. Following the 2012 election, establishment Republicans built a new PAC to protect incumbents from Tea Party primary challenges.[686] Establishment Democrats have similarly made new PACs to protect incumbents from progressive insurgents.[687] After the Progressive Insurgency's first election, the Democratic Party also formalized its blacklist of firms that work with challengers to limit insurgents' access to campaign infrastructure, before repealing the formal

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[683] Marantz, "Are We Entering a New Political Era?"; Engler and Engler, "Why the Left Sees an Opening for a 'Realignment' in U.S. Politics."

[684] Corey Robin, "Opinion | Why the Biden Presidency Feels Like Such a Disappointment," *The New York Times*, December 9, 2021, sec. Opinion, https://www.nytimes.com/2021/12/09/opinion/joe-biden-political-time.html.

[685] Stein, "The Left Dreamed of Remaking America. Now, It Stares into the Abyss as Biden's Plans Wither."

[686] Beth Reinhard, "The GOP Establishment's Bid to Push Back the Tea Party Insurrection," *The Atlantic*, October 24, 2013, sec. Politics, https://www.theatlantic.com/politics/archive/2013/10/gop-establishment-bid-to-push-back-the-tea-party-insurrection/309608/.

[687] Voght, "Exclusive: Top House Democrat Unveils Plan to Beat Back Progressive Rebellion."

rule shortly after the 2020 election.[688] The Republican Party did not have a similar rules change to retaliate against the Tea Party. A few Democrats have also emphasized their closeness to elected insurgents to lessen the threat of an insurgent challenge without coopting their policy.

Another distinction between the two insurgencies is how combative their elected members were with their host party's leadership and members leadership in Congress. This depends on how many elected insurgents there are and how their ideological orientation encourages or constrains their behavior. The Tea Party had a significantly higher number of representatives than the Progressive Insurgency. It also had a series of its own caucuses, the first of which Republicans founded months prior to the 2010 midterms and influx of Tea Party members of Congress, which allowed its representatives to have significant bargaining power with other factions of their party.[689] Most important, the Tea Party's reactionary conservatism and desires to inhibit government to make Americans hate it more enabled it to use obstruction and procedural radicalism to get what it wanted—which was often just sabotaging policy.[690] In Tea Partiers' first Congress, their obstruction led to "repeated episodes of a near government shutdown" over government spending and debt.[691] The Tea Party did not influence every part of Republican policy in its first Congress, but it made an extraordinary impact on its host party, not only in its legislative priorities but through its confrontational tactics and obstruction. Knowing it would be a liability for future insurgent challenges, Republicans essentially stopped cooperating with the Obama administration.[692] The elected insurgents' greatest achievement—and clearest example of their combativeness toward party leadership—was their organized ouster of John Boehner as Speaker

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[688] Mutnick, "House Democrats End Controversial Consultant Ban."

[689] Rubin, "Organizing at the Extreme"; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.

[690] Blum, *How the Tea Party Captured the GOP*.

[691] Rosenthal and Trost, "Introduction: The Rise of the Tea Party."

[692] Skocpol and Williamson, *The Tea Party and the Remaking of Republican Conservatism*; Blum, *How the Tea Party Captured the GOP*.

of the House for being an insufficiently ideologically and tactically hardline.[693]

In contrast, elected progressive insurgents are trying to make government responsive to the needs of working- and middle-class people and show Americans that their government can work for them. To do so requires passing new policy: they cannot realize their objective through putting their feet down and obstructing Congress. In this way, the progressive insurgents are constrained by their ideological orientation.[694] While progressive insurgents and leaders of the Progressive Caucus successfully delayed a vote on Biden's bipartisan infrastructure bill for a few months, they did so to keep their leverage to pass the paired Build Back Better bill that had many more of their policy priorities. When party moderates organized the votes to separate these bills, the elected insurgents faced a conundrum. Only a handful ultimately voted against it because most still thought that the benefits of the one bill were too valuable to destroy.[695] This episode of failed legislative brinkmanship exposes a limitation of the Progressive Insurgency's success: all but two elected progressive insurgents have either defeated Democratic incumbents or won election in safe Democratic districts. As such, they have replaced Democratic votes, some of whom were conservative Democrats, but have not expanded the party's caucus. In their Congresses, then, where Democrats have had slim majorities, progressive insurgents have not had the necessary votes to maintain their strategy and directly influence policy in a way that they potentially could with even a few more Democrats in Congress. Their behavioral calculus is therefore much more

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[693] Rubin, "Organizing at the Extreme"; Jake Miller, "Tea Party Group Mobilizes to Oust House Speaker John Boehner," *CBS News*, January 10, 2014, https://www.cbsnews.com/news/tea-party-group-mobilizes-to-oust-house-speaker-john-boehner/. To make explicit, Boehner was a deeply conservative Republican, who in part owed his speakership to the Tea Party before it ousted him.

[694] Leifer and Shahid, "The Realigners"; Forgey, "AOC: 'In Any Other Country, Joe Biden and I Would Not Be in the Same Party.'" Indeed, as Representative Ocasio-Cortez and Waleed Shahid, one of the founders of Justice Democrats, have observed, the conservative faction of the party, specifically the Blue Dog Caucus, exercises its obstructionist powers much more than the elected insurgents, making it more a Tea Party-like force in the Democratic Party than the insurgency.

[695] Errol Louis, "AOC's Warning for Democrats: 'We're in Trouble,'" *Intelligencer*, March 29, 2022, https://nymag.com/intelligencer/2022/03/alexandria-ocasio-cortez-i-was-right-about-joe-manchin.html.

complicated than that for Tea Partiers.

There are several other influential factors behind the Tea Party's and Progressive Insurgency's different degrees of success that are beyond their control. First is the dispersal of power between the two branches of Congress and the president and the constitutionally built-in bias toward policy *inaction*: a coalition behind a bill must overcome every veto point in and between these institutions—and there are many—to become law, while opponents only need one veto point to prevent its passage. This makes obstruction easier than passing policy, a great institutional advantage that the Tea Party had over the Progressive Insurgency. To reiterate, passing policy in Congress is extremely hard, as even the Tea Partiers learned when, after winning unified control of government, they failed by one vote to repeal the Affordable Care Act, their signature issue. Second, the Republican and Democratic parties are not mirror reflections of each other. The parties have different histories and internal organization that influence their reaction and receptivity to the two insurgencies.[696] For example, the Republican Party has much less tolerance for ideological diversity among its elite than does the Democratic Party and has a different—in many ways, more responsive—relationship to its base, which likely accelerated its cooptation of Tea Party policy and tactics.[697] The constitutional policy-making process and the parties' histories were out of the insurgencies' control but still shaped their broad influence on their host parties and their direct policy impact.

Finally, the two insurgencies have different temporal relationships with related presidential insurgencies in their host parties. On the right, the Tea Party preceded Donald Trump's insurgent

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[696] Blum, *How the Tea Party Captured the GOP*; Matt Grossmann and David A. Hopkins, "Opinion | Why There Is No 'Liberal Tea Party,'" *The New York Times*, April 17, 2018, sec. Opinion, https://www.nytimes.com/2018/04/17/opinion/democrats-liberal-tea-party.html. Boatright, *Getting Primaried* also contends that Republicans are traditionally more fearful of primary challenges than are Democrats.
[697] Ibid.

presidential campaign in the Republican Party. Its tremendous success and destabilization of the Republican Party made Trump's primary election victory possible six years later.[698] Republican candidates are no longer directly affiliated with the Tea Party. But they have continued to use insurgent confrontational tactics to primary or threaten to primary any incumbent that is not sufficiently conservative—including members first elected as Tea Partiers—or (now) sufficiently loyal to Donald Trump. The Republican Party may be stuck in a new form of perpetual insurgency, a continual accelerator pushing the party further and further right and out of the bounds of democratic politics. On the left, the Progressive Insurgency mobilized following Bernie Sanders's first insurgent presidential campaign. It was only entering its second electoral cycle, having made far fewer inroads into the Democratic Party, when Sanders ran for the presidential nomination and lost again in 2020. Elected insurgents', particularly Representative Ocasio-Cortez's, endorsement added energy and reinvigorated Sanders's second campaign.[699] But, despite some changes within the Democratic Party since Sanders's first run, the Progressive Insurgency had not taken over and transformed their host party the way the Tea Party had.[700] The congressional insurgencies' different impact on their host parties helps explain the different success of their linked presidential insurgents, despite the broad, antiestablishment sentiment among American voters in these elections.

This comparison reveals that the Tea Party and the Progressive Insurgency had wildly varying degrees of outright electoral success and impact on their host parties. Although the insurgencies defeated same the number of incumbents in their first election cycles, the Tea Party managed to create many more incentives for Republicans to coopt their policy than the Progressive

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[698] Blum; Gervais and Morris, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*.

[699] O'Connor, "When the Party's Over."

[700] Masket, *Learning from Loss*.

Insurgency has for Democrats. Elected members of the insurgencies also faced different ideological restraints on their strategies in Congress, where the Tea Party's desire to obstruct and impede government is easier to achieve given Congress's design than the Progressive Insurgency's desire to use government to pass ambitious policy that improves Americans' lives. In a matter of years, the Tea Party took over the Republican Party. The Progressive Insurgency has impacted the Democratic Party but it is nowhere close to exercising so much power within it so quickly.

The Efficacy of Intraparty Insurgency over Third Party Bids: Comparing the Progressive Insurgency to the Green Party

The Progressive Insurgency has not been as immediately successful as the Tea Party, but it has been much more successful than an older but still contemporary left electoral movement, the Green Party, that chose to seek institutional power as a third party rather than through the Democratic Party. The Progressive Insurgency has achieved levels of outright electoral success and policy influence on the Democratic Party in a matter of years that the decades-old Green Party could only dream of. This underscores the efficacy of insurgency over a third party bid in the United States, given its two-party system.

The power of insurgency starts with elections. Contesting elections since 1996, the Green Party has failed to win a single seat at the national level.[701] While the party fields roughly 50 congressional candidates per election, they usually receive less than 3% of the vote.[702] The Progressive Insurgency, meanwhile, has won 16 seats in Congress in its first two elections, with a sizeable number of its candidates winning over 25% of the vote in Democratic primaries. Very

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[701] Steve Lem, "The Green Party of the United States," in *Beyond Donkeys and Elephants: Minor Parties in Contemporary American Politics*, ed. Richard Davis, (Lawrence, KS: University Press of Kansas, 2020), 64–81.
[702] Ibid.

few of its candidates have earned less than 3% of the vote. Green Party presidential candidates have earned at most 2.7% of the nationwide general election vote.[703] At the presidential level, the Progressive Insurgency's closest equivalent, Sanders's presidential insurgencies in 2016 and 2020, garnered the support of roughly 30-40% of the Democratic primary electorate.[704] Further, the Green Party's electoral contestation outside of the Democratic Party in general elections, in contrast to the Progressive Insurgency's contestation within the Democratic Party in primary elections, makes its candidates potential "spoilers." That is, while only receiving a small share of the vote, Green Party candidates can "spoil" Democrats' prospects and allow Republicans to win the seat in narrow races. Vying for power within the Democratic Party in primary elections, the Progressive Insurgency does not have the same detractive effect on the party's candidates in general elections.

Thus, from the outset, the Progressive Insurgency has been dramatically more successful in winning election outright but also in the electoral performance of its losing candidates. In the spring of 2016 when the presidential primaries were in full swing, Ralph Nader—the Green Party candidate who won 2.7% of the general election vote in 2000, potentially costing Democrats the presidency—opined in the *Washington Post* that "Bernie Sanders was right to run as a Democrat." He wrote, "By running as a Democrat, Sanders declined to become a complete political masochist, and he avoided exposing his campaign to immediate annihilation by partisan hacks."[705] Not only does running as a Democrat seem to increase the electoral support for candidates left of the

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[703] Emily Atkin, "The Democrats Stole the Green Party's Best Idea," *The New Republic*, February 22, 2019, https://newrepublic.com/article/153127/democrats-stole-green-partys-best-idea.

[704] "2016 Democratic Popular Vote," https://www.realclearpolitics.com/epolls/2016/president/democratic_vote_count.html; "2020 Democratic Popular Vote," https://www.realclearpolitics.com/epolls/2020/president/democratic_vote_count.html.

[705] Ralph Nader, "Ralph Nader: Why Bernie Sanders Was Right to Run as a Democrat," *Washington Post*, March 25, 2016, https://www.washingtonpost.com/posteverything/wp/2016/03/25/ralph-nader-why-bernie-sanders-was-right-to-run-as-a-democrat/.

mainstream of the Democratic Party, but insurgent candidates' intraparty institutional and ideological challenge is more threatening to the party, and therefore results in more policy concessions, than the general election contestation of a third party candidate.

The benefits of launching an intraparty insurgency over a third party in a two-party system are evident in candidates' ability to win election to Congress outright. They extend to the movement's immediate impact on their host party or politically-closest major party, ostensibly the objective of ideological political actors like the Greens who know they are unlikely to win election.[706] Like the Progressive Insurgency's policy agenda, the Green Party's platform is much further left than the Democratic Party's. Over the last two decades, some of the Greens' ideas have permeated the Democratic Party's discourse and policy, but this process has been retarded relative to the Progressive Insurgency's near-immediate influence.[707] In contrast, through its simultaneous institutional and ideological challenge to the Democratic Party from within it, the Progressive Insurgency has been able to impact the national party's policy conversation, proposed policy, and even some passed policy rapidly. The Green New Deal may be the most concrete illustration of these dynamics. The policy idea originated with the Green Party in 2010.[708] It was not until insurgent Alexandria Ocasio-Cortez's election in 2018 that Democrats entertained the policy and it permeated the national political discourse. The specifics of Ocasio-Cortez's proposal differ from and are less drastic than the Greens', but as a minor party rather than an intraparty insurgency, the Greens failed to do in nearly a decade what the Progressive Insurgency did nearly overnight. While Nader's 2000 presidential run may have cost the Democrats victory in Florida, this contestation outside of the party did not result in the same kind of pressures for policy adoption. Put differently,

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[706] Rosenstone, Behr, and Lazarus, *Third Parties in America*.
[707] Lem, "The Green Party of the United States."
[708] Atkin, "The Democrats Stole the Green Party's Best Idea."

even as Sanders and the Progressive Insurgency have struggled to make greater inroads to the Democratic Party, they have had an easier time and been more influential as insurgents than they would have had as an independent third party.

This comparison of the Progressive Insurgency's and the Green Party's outright electoral and policy impact success on the Democratic Party underscores insurgency as the most efficacious route for ideologically excluded political movements to win institutional power and change a major party in the United States.

The Future of the Progressive Insurgency and its Place in Left Resurgence

The Progressive Insurgency has contested and won elections in 2018 and 2020, which this thesis explores in depth. This spring, it is entering into its third electoral cycle. This thesis's final substantive contribution is to engage with and hypothesize about its future. What does the movement need to be more successful? How does the insurgency in the House of Representatives relate to local and state progressive insurgencies? What is its likely future?

Toward Greater Insurgent Electoral Success

The Progressive Insurgency's greater electoral success and therefore impact on the Democratic Party, insurgents believe, comes largely through the movement's improved organization, including strategic allocation of electoral resources, and organizing.[709] Challengers critiqued the insurgency's current state of organization as stifling its success. They suggested that concentrating monetary, staff, and volunteer resources on fewer candidates each election cycle would increase their rates of victory.[710] According to Mark Gamba, a 2020 insurgent in OR-05, the Progressive

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[709] Progressive insurgent interviews.
[710] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.

Insurgency "is not strategic. It's willy-nilly. It's anarchy. It's people doing whatever, doing things like running against popular progressive people who are already in Congress."[711] Since the Progressive Insurgency does not have one fully centralized organization, such national coordination and strategy is logistically out of reach. On the one extreme, Justice Democrats now has a tightly-controlled and strategic process for their candidate recruitment. One the other extreme, some challengers made the personal decision to run in their district and earned the support of national insurgent organizations and small-dollar donors midway through their campaign, if at all. It would be quite difficult to coordinate a movement where a sizeable number of candidates run purely of their own volition.[712]

Nevertheless, such a strategic, centralized organization—some kind of supra-insurgent organization or committee along the lines of Justice Democrats—is what many see as critical to its future success. One challenger reported that the Progressive Insurgency needs to replicate the Tea Party's organization (much of which, factually, was local and uncoordinated at the start), focus on its mission, and "financial infrastructure." Without explicitly naming their emulation of the Tea Party, others see a need to build more "coherent progressive infrastructure" to support challengers.[713] This "ecosystem" would offer financial support or fellowships for working-class candidates, coordinate and deliver early financial support for campaigns, and put aside principles to play the big money game—even, according to one, taking advantage of Super PACs' unlimited spending capacities. It would encourage elected insurgents and others with name recognition and cache in the movement to endorse candidates and get involved early in the electoral cycle, not just weeks before the election. It would also involve creating a pipeline of congressional candidates

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[711] Mark Gamba, interviewed by Amelia Malpas, August 19, 2021.
[712] Progressive insurgent interviews.
[713] Ibid.

who have served in prior elected office in state legislatures or on city councils (one of the most significant factors in predicting insurgents' primary vote share) which require far fewer resources to win.[714] In fact, some tenets of progressive insurgents' diagnoses directly contradict what the original post-Sanders groups sought to cultivate: a grassroots movement of ordinary citizens without political backgrounds running for office.[715]

In addition to movement organization, progressive insurgents see more extensive and more strategic organizing as a requisite for the expanding the Progressive Insurgency's electoral success. Qasim Rashid, a 2020 insurgent in VA-01, explained that "organizing and building relationships is more important than any endorsement you're going to get. It's more important than any campaign donation you're going to get or any policy position paper you're going to put up. It comes down to building those relationships, organizing people, and getting them to the polls."[716] Others suggested that progressive insurgent campaigns for the House should organize more alongside other progressive campaigns for lower offices, to build movement solidarity locally— and to maximize canvassing efficiency. More broadly, and related to earlier discussion of the Progressive Insurgency and unions, several challengers raised organizing with labor as *the* road to the insurgency's success.[717] One challenger clarified that the movement needs support from union leadership and, particularly in the South, Black church leadership, two community political forces that have largely proved elusive for progressive insurgents.[718] For another, "there's a lot of work to be done before [the progressive movement] is truly inclusive" of Black Americans and other people of color, which involves organizing with and listening to communities most affected by

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[714] Progressive insurgent interviews.
[715] Lears, *Knock Down the House*; Marantz, "Are We Entering a New Political Era?"
[716] Qasim Rashid, interviewed by Amelia Malpas, September 15, 2021.
[717] Progressive insurgent interviews.
[718] Jen Perelman., interviewed by Amelia Malpas, August 6, 2021.

issues on the progressive agenda.[719] Without greater organizing with local constituencies, with each other, and with other possible organizations with whom they share interests, challengers do not see the Progressive Insurgency increasing its success going forward.[720]

Post-2016 Progressive Insurgencies: Relationships Between Branches of the Insurgency

Congressional candidates organizing with local progressive insurgent campaigns is not a distant prospect. The Progressive Insurgency in the House of Representatives is not the only insurgency that Bernie Sanders's 2016 presidential bid catalyzed. There have been a few, all electorally unsuccessful, candidates for the United States Senate. But the movement's numbers and victories are greatest for state and local offices, where approximately a few thousand progressive insurgents have run and a few hundred have won nationwide. Of note is the association between progressive insurgents' congressional and Sanders's statewide success, on the one hand, and left electoral resurgence for local and state office, on the other.[721] Put differently, there is a broad correlation between constituencies that have elected a progressive insurgent to the House and an upswing in not only in the number of progressive candidates running but their victories for other elected offices in that locality.

New York City and metropolitan area have elected three insurgents to the House of Representatives: Alexandria Ocasio-Cortez in 2018 and Jamaal Bowman and Mondaire Jones in 2020. Ocasio-Cortez's victory was a watershed moment for the Progressive Insurgency nationally, but it came about because of the growing strength of local progressive organizing. that other

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[719] Robert Emmons Jr., interviewed by Amelia Malpas, July 29, 2021.
[720] Progressive insurgent interviews.
[721] Data from organization websites and Wikipedia pages. Core insurgent organizations, like the Democratic Socialists of America and Our Revolution, also endorse local and state candidates, so I examined these candidates' election in relation to the House insurgent's victory.

progressive candidates benefited from. Since then, New Yorkers have elected seven Democratic

Socialists of America-endorsed candidates to the state legislature (one of whom volunteered on

Ocasio-Cortez's campaign) and about the same number of Our Revolution-endorsed candidates.[722]

Within New York City, they have elected numerous progressive insurgents as city comptroller, as

city councilors, and as borough presidents.[723] New York is a hotbed for progressive insurgencies.

Following Ocasio-Cortez's victory, the area had a remarkably high concentration of progressive

challengers to incumbent Democratic members of Congress. With subsequent election of

Representatives Bowman and Jones, it has had the highest number of successful progressive

insurgents of any particular geographic area in the US. The success of New York insurgents

running for offices from city council to Congress is also probably why one of the state's senators,

Senate Majority Leader Chuck Schumer, seems extraordinarily weary of an insurgent challenge as

evidenced in his preemptive policy cooptation.

While this progressive mobilization in New York is notable, it is not the only place where

a congressional insurgent victory preceded and possibly led to others. For instance, Ayanna

Pressley was elected to Congress from Boston in 2018. In that same election and since then, a

number of Democratic Socialists of America- and Our Revolution-endorsed candidates have won

election to the Boston city council and the city councils of neighboring cities like Somerville. And

Boston elected a progressive insurgent mayor.[724] In St. Louis, a handful of Our Revolution

candidates have already been elected to the city's Board of Aldermen (equivalent of a city council)

since Representative Cori Bush's election in 2020.[725] These dynamics and the legacy of

[722] Kormann, "Alexandria Ocasio-Cortez's Victory Party | The New Yorker"; Gabriel Winant, "India Walton Is a Sign of What the Socialist Movement Could Become," *Jacobin*, July 2, 2021, https://jacobinmag.com/2021/07/india-walton-buffalo-mayor-rust-belt-health-postindustrial-workers-socialist-black-vote-race-class.

[723] Data from organization websites and Wikipedia pages.

[724] Perry Bacon Jr., "Opinion | Ayanna Pressley Is Trying to Build a Very Big Squad," *Washington Post*, November 19, 2021, https://www.washingtonpost.com/opinions/2021/11/19/ayanna-pressley-is-trying-build-very-big-squad/.

[725] Data from organization websites and Wikipedia pages.

progressive organizing are also seen with some of the states that Sanders won in the 2020 Democratic presidential primaries. A year after Sanders won the Nevada Democratic caucus, which was one of the campaign's greatest organizing achievements, a group of Democratic Socialists of America-backed candidates won all five elected positions within the Nevada Democratic Party (only about 450 "governing members" of the party voted).[726] This progressive victory—which was not without pushback as high-up officials in state party quit in protest—grew out of the progressive organizing that started with the Sanders campaign.[727]

Finally, these local and state victories have great potential for the future of the movement, which elected progressive insurgents in the House seem to be aware of. Representative Alexandria Ocasio-Cortez's Courage to Change PAC, which supports progressive insurgents, is entirely focused on state and local candidates in the 2022 elections unlike in 2020.[728] In the short term, the changing ideological compositions of state legislatures and city councils impacts their priorities and public policy. With national policy gridlock the norm, some lower elected bodies can still pass policy that alleviates suffering and hardship. It also has the potential for more American voters to experience the material effects of progressive governance, possibly making them more open to or enthusiastic about progressive candidates at all levels of office. In the longer term, it has the possibility of cultivating a pipeline of progressive insurgents who have experience in elected office and established ties to their constituencies before they run for Congress. Sanders's runs sparked a broad movement, running within and taking on the Democratic Party at all levels of office in the United States. These insurgencies, further, have interacted with and fed off each other in the

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[726] Akela Lacy and Ryan Grim, "Entire Staff of Nevada Democratic Party Quits After Democratic Socialist Slate Won Every Seat," *The Intercept*, March 8, 2021, https://theintercept.com/2021/03/08/nevada-democratic-party-dsa/; Engler and Engler, "Why the Left Sees an Opening for a 'Realignment' in U.S. Politics."

[727] Lacy and Grim, "Entire Staff of Nevada Democratic Party Quits After Democratic Socialist Slate Won Every Seat."

[728] "Courage to Change Pledge Distinctions," *Courage to Change*, https://couragetochangepac.org/distinctions/.

earliest years of an emergent left electoral force.

The Progressive Insurgency in 2022 and the Fight for What's Next

To continue the Progressive Insurgency's momentum, according to Jen Perelman, a 2020 insurgent in FL-23, challengers need to stay highly involved in the movement. The problem, she said, "is that when most progressives lose, they go away and you never hear from them again. They let their entire platform die."[729] Seventy percent of progressive insurgents are definitely or considering running for Congress again, most of whom are on the fence.[730] This indicates a certain level of continuation in the insurgency in upcoming electoral cycles, just as there was between 2018 and 2020. Further, because having run in 2018 increased 2020 insurgents' primary vote share significantly, there is reason to believe that these veteran insurgents will perform better than they did in their first primaries. The insurgency is continuing and, as one challenger articulated hopefully, these years since Sanders's first run are the movement's "infancy," with much more to come.[731]

The 2022 electoral cycle is underway. In the first congressional primaries in Texas, a handful of progressive insurgents contested for seats with mixed results. Two insurgents received the backing of Justice Democrats, Greg Casar in TX-35 and Jessica Cisneros in TX-28. Casar, previously an Austin city councilor, ran in an open Democratic seat and won his primary outright. Cisneros ran against Representative Henry Cuellar, one of the most conservative Democrats in Congress, whom she primaried in 2020. She earned 47% of the vote to Cuellar's 48%; the two will face off again in a run-off election in late May. Beyond the endorsement of Justice Democrats,

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[729] Jen Perelman, interviewed by Amelia Malpas, August 6, 2021.
[730] In the survey, I asked challengers if they were planning on running for Congress again in 2022 or the future. Survey data; N = 30.
[731] Qasim Rashid, interviewed by Amelia Malpas, September 15, 2021.

Casar and Cisneros earned the support of Representative Alexandria Ocasio-Cortez (who campaigned for them), Senator Bernie Sanders, and other prominent elected progressives.[732] Two other Texas progressive insurgents, Jasmine Crockett and Claudia Zapata are advancing to the run-offs, having each received nearly 50% of the vote, in an open Democratic and open swing seat, respectively. But Crockett, who was endorsed by Our Revolution and the Working Families Party, was not the only progressive insurgent in the race: Jessica Mason, endorsed by Brand New Congress and the Democratic Socialists of America, also ran a (much less successful) campaign to represent the district.[733]

This snapshot is evocative of the evolving dynamics of the Progressive Insurgency and the strategic pitfalls still hindering its success. First, in Texas and across the United States, it appears that 2022 insurgents are primarily running against Democratic incumbents, in open Democratic seats, and in open or Republican-held swing seats—not in Republican districts. This is a continuation of the trend between 2018 and 2020 where the insurgency moved toward more direct institutional confrontation with the Democratic Party and away from running in areas where the party is institutionally and electorally weak. Second, it appears that while it is still a nationwide movement, there are substantially fewer insurgents running in 2022 than the roughly 100 who ran in both 2018 and 2020, which could benefit the movement by concentrating resources. Third, like Cisneros, a substantial number of candidates who ran in 2020 are running again in 2022. How much this advantages them this electoral cycle remains to be seen, given recent redistricting. On the one hand, roughly a dozen Democratic incumbents who faced a progressive insurgent challenge in 2018 or 2020 have announced their retirement, due in part to new district maps. This

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[732] Gus Bova, "Lone Star 'Squad': AOC Rallies for Texans Greg Casar and Jessica Cisneros," *The Texas Observer*, February 14, 2022, https://www.texasobserver.org/texans-greg-casar-jessica-cisneros-about-to-join-aocs-squad/.

[733] "Texas Primary Election Results," *The New York Times*, March 1, 2022, sec. U.S., https://www.nytimes.com/interactive/2022/03/01/us/elections/results-texas.html.

could give the insurgents who previously challenged them a major advantage now that the seat is open. On the other hand, because district lines are new, the boost from insurgents' name recognition from running a second or third time might only apply to some voters in the district, limiting the benefits associated with running multiple times.

Beyond where and how many insurgents are running in 2022, the Texas primaries show that some core insurgent organizations are becoming more strategic while a lack of coordination still haunts the political movement. Insurgents and observers alike view Justice Democrats as the flagship insurgent organization since it was instrumental in Ocasio-Cortez's 2018 victory. Its highly-coveted endorsement delivers not only direct resources to candidates but signals to volunteers and donors that the insurgent is a serious, viable candidate. Justice Democrats radically reduced the number of candidates it endorsed between 2018 to 2020 and has endorsed even fewer in 2022: a total of six, all in deeply Democratic districts.[734] Of these six, two, including Cisneros, have run for the seat before and, most importantly, three of their candidates are running in seats that previously saw impressive progressive insurgent (and/or non-insurgent) primary challenges to the incumbent. In addition to Cisneros's impressive 2020 showing and 2022 rematch, Odessa Kelly is running against Representative Jim Cooper in district where a challenger got over 39% of the vote in 2020. Rana Abdelhamid is running against Representative Carolyn Maloney, who earned less than 50% of the primary vote in 2020 due to a progressive insurgent who got about 15% of the vote and another mildly progressive non-insurgent challenger who got nearly 40%. This shows Justice Democrats' evolving strategy of concentrating on only a few candidates in districts with electoral histories that suggest increased chances of their primary election victory.

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[734] "Candidates," *Justice Democrats*, https://justicedemocrats.com/candidates/; David Weigel, "Analysis | The Trailer: Democrats Are Bracing for Primary Fights. Does the Left Have a Plan?," *Washington Post*, April 6, 2021, https://www.washingtonpost.com/politics/2021/04/06/trailer-democrats-are-bracing-primary-fights-does-left-have-plan/.

But, during the Progressive Insurgency's third electoral cycle, there is still a lack of strategic coordination between core insurgent organizations. This surfaces most obviously in the few races where organizations endorse different insurgents rather than consolidating behind one as they usually do, as in the TX-30 race where Crockett and Mason each received support from different groups. This is also true in PA-12, an open Democratic district, where Summer Lee, a state legislator, announced her run with the backing of Justice Democrats (she has since gone on to receive the endorsements of Sunrise and the Working Families Party as well). A few weeks after this announcement, Brand New Congress endorsed Jerry Dickinson, who does not have prior electoral experience, for the same seat. This is poor strategy and shows the lack of coordination from these groups: as has happened in the past, the presence of two progressive insurgents could split the vote of progressive constituents and ensure that neither wins when they otherwise might have.

It remains to be seen how progressive insurgents perform in their 2022 primary and general elections. With Casar's primary victory in a safe Democratic district, at least one will be entering the 118th Congress next January. He will likely be joined by several others. The stakes are high: the United States suffers from, among others, climate, economic, and democratic crises, which the insurgents want to ameliorate before they irreparably worsen. As for the fight for what is next if there is to be some drastic departure from the last 40 years of politics and governance, the Progressive Insurgency has nowhere close to the amount of institutional power or extent of electoral base support as the post-Tea Party radical right mainstream of the Republican Party.[735] Progressive insurgents have played a critical role in pushing the Democratic Party to entertain its most ambitious social policies since the New Deal and Great Society, but the party ultimately did

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[735] Engler and Engler, "Why the Left Sees an Opening for a 'Realignment' in U.S. Politics."

not pass them and improve Americans' lives the way those past social policies have. The Progressive Insurgency has made an impact on the Democrats and on American politics, but it has not yet won power on the scale required to address America's myriad crises the way it sees fit and usher in a new political era of multiracial social democracy in the United States.

Further Research

Prior to this thesis, the Progressive Insurgency had not received extensive scholarly study. While this thesis begins to fill that gap, it has also uncovered areas of insurgency and current progressive politics that deserve more academic attention. For example, there should be quantitative study of how the Democratic Congressional Campaign Committee's blacklist of firms that work with challengers that primary incumbents impacted their success; of the efficacy of the Bernie Sanders's small-dollar, digital fundraising model for first-time candidates without national political celebrity; and of how congressional insurgents' electoral success is correlated with subsequent local and state progressive victories. Moreover, this thesis examines the first two electoral cycles of the Progressive Insurgency and its impact on the Democratic Party's policy since its first candidate's victory in mid-2018. It would be valuable to continue this study. First, further study would illuminate how the insurgency's third electoral cycle confirms existing findings about and shows evolving dynamics within the movement. Second, it would show how Democrats proceed with policy ideas in Build Back Better that had the support of over 90% of the congressional party, for example, childcare expansion, and how the insurgency's impact on the party changes in the coming years when Democrats likely lose control of Congress. Continuing these lines of inquiry would add new nuances to and further support the claims made in this thesis.

Concluding Words on the Progressive Insurgency

Nina Turner is running for Congress again. The first time, she narrowly lost to Shontel Brown in an August 2021 special election to fill a vacant seat. This time, she will primary now-incumbent Brown. Just as both elected and failed progressive insurgents came to Cleveland to campaign on her behalf, Turner has been busy supporting insurgents running in 2022 between her campaigns. She went to Los Angeles to support Shervin Aazami running in California's 32nd congressional district. She went to Nevada's 1st congressional district to campaign for Amy Vilela's second campaign for Congress. Months before voting starts in the primary election, Turner's visit to Vilela's district to support her insurgent bid coincided with Representative Cori Bush's trip to do the same.[736] Bush knows Vilela from 2018, when both mounted ultimately unsuccessful insurgent campaigns. Bush ran again and won in 2020. Now Vilela is again trying to do what seemed impossible before Alexandria Ocasio-Cortez made it possible, as are Nina Turner and progressive insurgents running for the House of Representatives across the country. Most of them will lose, but losing is not the end of their ideas or their influence. And the few that do win, like Representatives Ocasio-Cortez and Bush, gain the institutional power to legislate to improve the lives of millions of Americans. Still growing, the Progressive Insurgency is in its early years of working to make the United States a more equal, a more just—a more perfect—nation.

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[736] A. Bryan Johnson, "Nina Turner Is Still Mad As Hell, and Running for Congress (Again)," *The Nation,* February 11, 2022, https://www.thenation.com/article/politics/nina-turner-congress-ohio/; Cori Bush [@CoriBush], "This Is What Sisterhood Looks Like," Tweet, *Twitter*, February 21, 2022, https://twitter.com/CoriBush/status/1495879617009360899.

Appendix A: Challengers in the Progressive Insurgency

The table below shows each insurgent, bolded if they won election to the House of Representatives; the specific district, year, and type of district that they ran in; their primary vote share and if they won their primary election (* denotes they advanced in a top-two primary against a Democratic incumbent); which core insurgent organizations endorsed them (JD = Justice Democrats, BNC = Brand New Congress, OR = Our Revolution, S = Sunrise, DSA = Democratic Socialists of America, and WFP = Working Families Party); and the number of other insurgents that follow them on Twitter. In operationalizing insurgency, I also used endorsements by individuals and peripheral insurgent organizations, which the table does not show.

Insurgent	District	Year	District type	Primary vote share	Won primary	Core organization endorsements	Twitter followers (Aug. 2021)
Mary Matiella	AZ-02	2018	Open/GOP-held swing	9.4	no	JD	13
Garrick McFadden	AZ-06	2018	Republican	20.2	no	—	12
Brianna Westbrook	AZ-08	2018	Republican	39.7	no	JD, OR	75
Audrey Denney	CA-01	2018	Republican	17.9	yes	JD, OR	46
Roza Calderón	CA-04	2018	Republican	6.4	no	JD, BNC	72
Dotty Nygard	CA-10	2018	Open/GOP-held swing	0.9	no	JD	27
Ryan Khojasteh	CA-12	2018	Democratic incumbent	4.6	no	BNC	20
Shahid Buttar	CA-12	2018	Democratic incumbent	8.5	no	—	62
Steven Jaffe	CA-12	2018	Democratic incumbent	5.9	no	—	54
Bryan Cafario	CA-25	2018	Open/GOP-held swing	18.4	no	JD	12
Andy Thorburn	CA-39	2018	Open/GOP-held swing	9.2	no	OR	13
Katie Porter	CA-45	2018	Open/GOP-held swing	20.3	yes	—	71
Doug Applegate	CA-49	2018	Open/GOP-held swing	13.1	no	JD	29
Mike Levin	CA-49	2018	Open/GOP-held swing	17.5	yes	—	53
Ammar Campa-Najjar	CA-50	2018	Republican	17.6	yes	JD, OR, WFP	51
Saira Rao	CO-01	2018	Democratic incumbent	31.8	no	JD	24
Joe Neguse	CO-02	2018	Open Democratic	65.7	yes	—	24
Stephany Rose Spaulding	CO-05	2018	Republican	39.3	yes	JD	28
Levi Tilleman	CO-06	2018	Open/GOP-held swing	34.1	no	OR	3

Chardo Richardson	FL-07	2018	Democratic incumbent	13.8	no	JD, BCN	37
Sanjay Patel	FL-08	2018	Republican	100	yes	JD, OR	9
Pam Keith	FL-18	2018	Open/GOP-held swing	39.7	no	JD, BNC	43
Michael Hepburn	FL-27	2018	Open/GOP-held swing	6.1	no	JD	48
Lisa Ring	GA-01	2018	Republican	67.5	yes	JD, OR	53
Kaniela Ing	HI-01	2018	Open Democratic	6.3	no	JD, S, DSA, WFP	55
Courtney Rowe	IA-01	2018	Open/GOP-held swing	7.6	no	JD	10
Pete D'Alessandro	IA-03	2018	Open/GOP-held swing	15.6	no	JD, OR	13
JD Scholten	IA-04	2018	Republican	51.3	yes	OR, WFP	80
Marie Newman	IL-03	2018	Democratic incumbent	48.9	no	JD, OR	93
Jesus "Chuy" Garcia	IL-04	2018	Open Democratic	66.2	yes	OR, WFP	16
Sameena Mustafa	IL-05	2018	Democratic incumbent	24.1	no	JD	—
Anthony Clark	IL-07	2018	Democratic incumbent	26.1	no	JD, BNC	88
David Gill	IL-13	2018	Open/GOP-held swing	14.4	no	JD, BNC	—
Dan Canon	IN-09	2018	Republican	30.7	yes	JD	32
Liz Watson	IN-09	2018	Republican	66.4	no	WFP	—
Brent Welder	KS-03	2018	Open/GOP-held swing	33.8	no	JD, BNC, OR	43
James Thompson	KS-04	2018	Republican	65.2	yes	JD, BNC, OR, DSA	64
Paul Walker	KY-01	2018	Republican	81.2	yes	OR	5
Tahirah Amatul-Wadud	MA-01	2018	Democratic incumbent	29.3	no	OR	5
Alexandra Chandler	MA-03	2018	Open Democratic	5.7	no	—	16
Juana Matias	MA-03	2018	Open Democratic	15.2	no	JD	12
Ayanna Pressley	MA-07	2018	Democratic incumbent	58.6	yes	JD, S, WFP	129
Brianna Wu	MA-08	2018	Democratic incumbent	22.9	no	—	59
Roger Manno	MD-06	2018	Open Democratic	10.4	no	JD, WFP	6
Matt Morgan	MI-01	2018	Republican	100	yes	JD	12
Rob Davidson	MI-02	2018	Republican	100	yes	JD, BNC	47
David Benac	MI-06	2018	Open/GOP-held swing	21.3	no	JD, BNC	50
Steven Friday	MI-07	2018	Republican	14.8	no	OR	—
Fayrouz Saad	MI-11	2018	Open/GOP-held swing	19.4	no	JD	—
Rashida Tlaib	MI-13	2018	Open Democratic	31.2	yes	JD, OR, S, WFP	132

Ilhan Omar	MN-05	2018	Open Democratic	48.2	yes	JD, OR, S	131
Cori Bush	MO-01	2018	Democratic incumbent	36.9	no	JD, BNC, OR	130
Winston Apple	MO-06	2018	Republican	30.8	no	OR	2
Jamie Schoolcraft	MO-07	2018	Republican	40.6	yes	JD	4
John Heenan	MT-01	2018	Republican	31.7	no	JD, BNC, OR	25
Richard Watkins	NC-04	2018	Democratic incumbent	6.5	no	OR	4
Jenny Marshall	NC-05	2018	Republican	45.6	no	JD, BNC	74
Kara Eastman	NE-02	2018	Open/GOP-held swing	51.6	yes	JD, S, WFP	86
Mindi Messmer	NH-01	2018	Republican	9.7	no	BNC	0
Tanzie Youngblood	NJ-02	2018	Open/GOP-held swing	18.5	no	JD	20
James Keady	NJ-04	2018	Republican	42.9	no	OR, WFP	26
Javahn Walker	NJ-06	2018	Democratic incumbent	13.8	no	—	24
Peter Jacob	NJ-07	2018	Open/GOP-held swing	19.1	no	JD, BNC, OR	—
Antoinette Sedillo Lopez	NM-01	2018	Open Democratic	20.6	yes	JD	18
Deb Haaland	NM-01	2018	Open Democratic	40.6	no	S, WFP	67
Amy Vilela	NV-04	2018	Open/GOP-held swing	9.2	no	JD, BNC, OR	87
Liuba Grechen Shirley	NY-02	2018	Open/GOP-held swing	57.3	yes	OR, WFP	55
Michael DeVito	NY-11	2018	Open/GOP-held swing	20	no	JD	28
Alexandria Ocasio-Cortez	NY-14	2018	Democratic incumbent	56.7	yes	JD, BNC, OR, S, DSA, WFP	167
Jeff Beals	NY-19	2018	Republican	12.9	no	JD	11
Patrick Nelson	NY-21	2018	Open/GOP-held swing	9.2	yes	JD	14
Tedra Cobb	NY-21	2018	Open/GOP-held swing	55.7	no	OR, WFP	31
Ian Golden	NY-23	2018	Republican	13.4	no	JD	4
Dana Balter	NY-24	2018	Open/GOP-held swing	62.4	yes	OR, WFP	43
Nate McMurray	NY-27	2018	Republican	100	yes	WFP	22
John Russell	OH-12	2018	Republican	16.3	no	JD	—
Steven Bacher	PA-01	2018	Open/GOP-held swing	8.2	no	—	3
Greg Edwards	PA-07	2018	Open/GOP-held swing	25.4	no	OR, WFP	18
Jess King	PA-11	2018	Republican	100	yes	JD, OR, S, WFP	38
Mary Geren	SC-03	2018	Republican	69.7	yes	OR	9

Danielle Mitchell	TN-03	2018	Republican	100	yes	BNC	—
J. Darnell Jones	TX-02	2018	Republican	22.1	no	JD, BNC	—
Lorie Burch	TX-03	2018	Republican	75	yes	JD	23
Jason Westin	TX-07	2018	Republican	19.2	no	—	19
Laura Moser	TX-07	2018	Republican	24.3	no	JD, OR, WFP	—
Mike Siegel	TX-10	2018	Republican	70.2	yes	—	72
Vanessa Adia	TX-12	2018	Republican	100	yes	JD, BNC	37
Adrienne Bell	TX-14	2018	Republican	79.8	yes	JD, BNC, OR	76
Derrick Crowe	TX-21	2018	Republican	23.1	no	JD, OR	28
Mary Wilson	TX-21	2018	Republican	30.9	no	JD	—
Rick Treviño	TX-23	2018	Open/GOP-held swing	33.2	no	JD, BNC, OR	—
Chris Perri	TX-25	2018	Republican	47.8	no	—	11
Julie Oliver	TX-25	2018	Republican	52.5	yes	—	53
Linsey Fagan	TX-26	2018	Republican	52.7	yes	JD, BNC	57
Lillian Salerno	TX-32	2018	Open/GOP-held swing	18.3	no	—	13
Shireen Ghorbani	UT-02	2018	Republican	—	yes	—	23
Darlene McDonald	UT-04	2018	Republican	—	no	JD	23
Jennifer Lewis	VA-06	2018	Republican	47.7	yes	OR	10
Anthony Flaccavento	VA-09	2018	Republican	78.6	yes	OR	8
Dorothy Gasque	WA-03	2018	Open/GOP-held swing	4.9	no	JD, BNC, OR	37
Sarah Smith	WA-09	2018	Democratic incumbent	26.9	yes*	JD, BNC, WFP	76
Randy Bryce	WI-01	2018	Open/GOP-held swing	59.6	yes	JD, S, WFP	87
Richard Ojeda II	WV-03	2018	Republican	52.2	yes	WFP	38
Eva Putzova	AZ-01	2020	Democratic incumbent	41.4	no	BNC	66
Anita Malik	AZ-06	2020	Republican	36.5	no	—	22
Audrey Denney	CA-01	2020	Republican	39.4	yes	S	46
Jason Kishineff	CA-05	2020	Democratic incumbent	2.7	no	—	40
Ben Emard	CA-06	2020	Democratic incumbent	7.8	no	—	20
Agatha Bacelar	CA-12	2020	Democratic incumbent	1.5	yes	—	26
Shahid Buttar	CA-12	2020	Democratic incumbent	13	yes*	—	62
Kimberly Williams	CA-16	2020	Democratic incumbent	5.9	no	BNC	—

Cenk Uygur	CA-25	2020	Open/GOP-held swing	6.6	no	—	96
Maebe A. Girl	CA-28	2020	Democratic incumbent	12	no	—	41
Angelica Dueñas	CA-29	2020	Democratic incumbent	23	yes*	—	30
CJ Berina	CA-30	2020	Democratic incumbent	11.1	no	OR, S	27
David Kim	CA-34	2020	Democratic incumbent	21	yes*	—	22
Liam O'Mara	CA-42	2020	Republican	22.9	yes	—	25
Peter Mathews	CA-47	2020	Democratic incumbent	11	no	BNC	2
Georgette Gomez	CA-53	2020	Open Democratic	20	yes	JD, OR	17
Jose Caballero	CA-53	2020	Open Democratic	1.6	no	—	38
Adam Christensen	FL-03	2020	Republican	34.5	yes	—	19
Pam Keith	FL-18	2020	Open/GOP-held swing	79.8	yes	WFP	43
Jen Perelman	FL-23	2020	Democratic incumbent	28	no	BNC	78
Lisa Ring	GA-01	2020	Republican	46	no	OR	53
Nikema Williams	GA-05	2020	Open Democratic	—	yes	—	19
Nabilah Islam	GA-07	2020	Open/GOP-held swing	12.3	no	BNC, OR	53
Michael Owens	GA-13	2020	Democratic incumbent	13.2	no	BNC	31
Kai Kahele	HI-02	2020	Open Democratic	76.5	yes	—	20
JD Scholten	IA-04	2020	Republican	99.6	yes	—	80
Robert Emmons	IL-01	2020	Democratic incumbent	10.3	no	BNC, S	66
Marie Newman	IL-03	2020	Democratic incumbent	47.3	yes	JD, OR, S	93
Anthony Clark	IL-07	2020	Democratic incumbent	13	no	BNC, DSA	88
Kina Collins	IL-07	2020	Democratic incumbent	13.9	no	—	21
Rachel Ventura	IL-11	2020	Democratic incumbent	41.3	no	BNC	46
Stefanie Smith	IL-13	2020	Open/GOP-held swing	23.5	no	—	9
Jim Harper	IN-01	2020	Open Democratic	10.1	no	BNC	—
Carlos Marcano	IN-03	2020	Republican	30.9	no	—	19
Brandon Hood	IN-09	2020	Republican	13.9	no	—	—
Alex Morse	MA-01	2020	Democratic incumbent	41.2	no	JD, BNC, S	40
Ihssane Leckey	MA-04	2020	Open Democratic	11.6	no	BNC	70
Jesse Mermell	MA-04	2020	Open Democratic	21	no	WFP	15
Shelia Bryant	MD-04	2020	Democratic incumbent	18.8	no	BNC	32

Mckayla Wilkes	MD-05	2020	Democratic incumbent	26.7	no	BNC, DSA	76
Jill Carter	MD-07	2020	Open Democratic	16	no	OR	6
Jon Hoadley	MI-06	2020	Open/GOP-held swing	52.2	yes	BNC, S	26
Solomon Rajput	MI-12	2020	Democratic incumbent	19.1	no	—	30
Cori Bush	MO-01	2020	Democratic incumbent	48.5	yes	JD, BNC, S, DSA, WFP	130
Tom Winter	MT-01	2020	Republican	10.5	no	—	10
Daniel Lockwood	NC-04	2020	Democratic incumbent	13.3	no	—	28
Barbara (Babs) Ramsey	NE-01	2020	Republican	22.4	no	—	8
Kara Eastman	NE-02	2020	Open/GOP-held swing	66.2	yes	JD, BNC, WFP	86
Christine Conforti	NJ-04	2020	Republican	25.1	no	OR, S	9
Arati Kreibich	NJ-05	2020	Democratic incumbent	33.5	no	OR, S, WFP	41
Amani Al-Khatahtbeh	NJ-06	2020	Democratic incumbent	3.8	no	—	15
Russ Cirincione	NJ-06	2020	Democratic incumbent	17	no	OR	56
Hector Oseguera	NJ-08	2020	Democratic incumbent	27.3	no	OR, WFP	48
Zina Spezakis	NJ-09	2020	Democratic incumbent	16.9	no	BNC, OR	43
Teresa Leger Fernandez	NM-03	2020	Open Democratic	42.8	yes	WFP	16
Anthony Thomas Jr.	NV-01	2020	Democratic incumbent	11.2	no	—	11
Melanie D'Arrigo	NY-03	2020	Democratic incumbent	25.7	no	BNC	58
Shaniyat Chowdhury	NY-05	2020	Democratic incumbent	24.1	no	BNC	50
Mel Gagarin	NY-06	2020	Democratic incumbent	20	no	BNC	43
Adem Bunkeddeko	NY-09	2020	Democratic incumbent	24.7	no	—	18
Isiah James	NY-09	2020	Democratic incumbent	10.4	no	BNC	55
Lindsey Boylan	NY-10	2020	Democratic incumbent	21.8	no	BNC	69
Lauren Ashcraft	NY-12	2020	Democratic incumbent	13.6	no	BNC	81
Samelys Lopez	NY-15	2020	Open Democratic	13.9	no	DSA, WFP	47
Tomás Ramos	NY-15	2020	Open Democratic	2.4	no	BNC	51
Jamaal Bowman	NY-16	2020	Democratic incumbent	55.4	yes	JD, BNC, OR, S, DSA, WFP	108
Mondaire Jones	NY-17	2020	Open Democratic	41.6	yes	OR, S, WFP	70
Dana Balter	NY-24	2020	Open/GOP-held swing	63	yes	OR, WFP	43

Robin Wilt	NY-25	2020	Democratic incumbent	31.8	no	—	13
Nate McMurray	NY-27	2020	Republican	—	yes	WFP	22
Morgan Harper	OH-03	2020	Democratic incumbent	31.9	no	JD, OR, S, WFP	61
Nick Rubando	OH-05	2020	Republican	51.4	no	BNC	30
Xavier Carrigan	OH-05	2020	Republican	22.5	yes	—	20
Daniel Kilgore	OH-15	2020	Republican	34.4	no	OR	10
Amanda Siebe	OR-01	2020	Democratic incumbent	6.7	no	—	42
Albert Lee	OR-03	2020	Democratic incumbent	16.8	no	BNC	66
Doyle Canning	OR-04	2020	Democratic incumbent	15.4	no	BNC	32
Mark Gamba	OR-05	2020	Democratic incumbent	22.9	no	BNC	44
Keeda Haynes	TN-05	2020	Democratic incumbent	39.9	no	OR	7
Corey Strong	TN-09	2020	Democratic incumbent	14.8	no	BNC	4
Mike Siegel	TX-10	2020	Republican	54.2	yes	BNC, OR, S, WFP	72
Adrienne Bell	TX-14	2020	Republican	61.8	yes	BNC, OR	76
Stevens Orozco	TX-18	2020	Democratic incumbent	3.4	no	OR	28
Sam Vega	TX-24	2020	Republican	4.5	no	—	8
Heidi Sloan	TX-25	2020	Republican	30.4	no	S, DSA	36
Julie Oliver	TX-25	2020	Republican	69.6	yes	OR, S, WFP	53
Jessica Cisneros	TX-28	2020	Democratic incumbent	48.2	no	JD, WFP	79
Donna Imam	TX-31	2020	Republican	56.6	yes	—	52
Qasim Rashid	VA-01	2020	Republican	52.5	yes	S	46
Zainab Mohsini	VA-11	2020	Democratic incumbent	22.4	no	—	27
Jason Call	WA-02	2020	Democratic incumbent	13.9	no	—	50
Rebecca Parson	WA-06	2020	Democratic incumbent	13.5	no	BNC, DSA	69
Beth Doglio	WA-10	2020	Open/GOP-held swing	15.2	yes	S	13
Michael Beardsley	WI-06	2020	Republican	15.6	no	OR, S	1
Cathy Kunkel	WV-02	2020	Republican	100	yes	S, WFP	14
Hilary Turner	WV-03	2020	Republican	29.5	yes	WFP	19

Appendix B: Interviewed and Surveyed Insurgents

The table below details which insurgents I interviewed; the date of their interview; if they took the survey; and their year and type of district.

Insurgent	Date of interview	Took survey	Year	District type
Tahirah Amatul Wadud	September 23, 2021	yes	2018	Democratic incumbent
Lauren Ashcraft	September 17, 2021	yes	2020	Democratic incumbent
Agatha Bacelar	August 2, 2021	no	2020	Democratic incumbent
David Benac	September 16, 2021	yes	2018	Open/GOP-held swing
Randy Bryce	September 13, 2021	yes	2018	Open/GOP-held swing
Shahid Buttar	August 23-4, 2021	yes	2018, 2020	Democratic incumbent
Roza Calderón	August 20, 2021	no	2018	Republican
Jason Call	August 10, 2021	yes	2020	Democratic incumbent
Shaniyat Chowdhury	August 24, 2021	yes	2020	Democratic incumbent
Adam Christensen	September 23, 2021	yes	2020	Republican
Anthony Clark	September 22, 2021	yes	2018, 2020	Democratic incumbent
Kina Collins	September 23, 2021	no	2020	Democratic incumbent
Beth Doglio	August 19, 2021	no	2020	Open Democratic
Angelica Dueñas	June 30, 2021	yes	2020 (ran for same seat as a Green rather than an insurgent in 2018)	Democratic incumbent
Robert Emmons Jr.	July 29, 2021	yes	2020	Democratic incumbent
Mel Gagarin	September 17, 2021	yes	2020	Democratic incumbent
Mark Gamba	August 19, 2021	yes	2020	Democratic incumbent
Liuba Grechen Shirley	September 1, 2021	no	2018	Open/GOP-held swing
Morgan Harper	October 18, 2021	no	2020	Democratic incumbent
Ryan Khojasteh	September 18, 2021	yes	2018	Democratic incumbent
David Kim	September 12, 2021	yes	2020	Democratic incumbent
Arati Kreibich	August 16, 2021	no	2020	Democratic incumbent
Albert Lee	August 25, 2021	yes	2020	Democratic incumbent
Laura Moser	September 24, 2021	yes	2018	Republican

Patrick Nelson	August 17, 2021	no	2018	Open/GOP-held swing
Liam O'Mara	August 3, 2021	no	2020	Republican
Julie Oliver	September 10, 2021	yes	2018, 2020	Republican
Stevens Orozco	August 17, 2021	yes	2020	Democratic incumbent
Hector Oseguera	July 8, 2021	yes	2020	Democratic incumbent
Jen Perelman	August 6, 2021	yes	2020	Democratic incumbent
Eva Putzova	July 23, 2021	yes	2020	Democratic incumbent
Tomás Ramos	September 1, 2021	yes	2020	Open Democratic
Saira Rao	September 16, 2021	yes	2018	Democratic incumbent
Qasim Rashid	September 15, 2021	yes	2020	Republican
Nick Rubando	August 30, 2021	yes	2020	Republican
Fayrouz Saad	September 29, 2021	yes	2018	Open/GOP-held swing
JD Scholten	September 13, 2021	no	2018, 2020	Republican
Sarah Smith	June 29, 2021	yes	2018	Democratic incumbent
Zina Spezakis	August 6, 2021	yes	2020	Democratic incumbent
Rachel Ventura	August 2, 2021	yes	2020	Democratic incumbent
Brent Welder	September 21, 2021	no	2018	Open/GOP-held swing
Brianna Wu	August 9, 2021	no	2018	Democratic incumbent

Appendix C: Technical Information on Regression Analyses

Predictors of Insurgent Primary Election Performance

The table below shows each variable in the regression analyses; whether it is related to the district, the insurgent, or the incumbent; how I operationalized it; and where the data are from.

District, insurgent, or incumbent	Independent variable	Operationalized as	Data source
District	Cook PVI	Values converted to be in relation to D+/-, e.g., D+16 = 16 and R+23 = -23	Cook Political Report
	Voter turnout 2018	Number that's the percentage of eligible voters that voted in 2018 midterms	US Census
	Median household income	Number, measured by $1,000 increments	Proximity One (congressional district data source)
	GINI coefficient	Value between 0-1, where 0 is perfect income equality and 1 is total income inequality	Proximity One
	Multiple challengers	Dummy variable. 1 for multiple challengers, 0 if not	Calculated by author
	District percent white	Number that is the percentage of white people in district, inclusive of Hispanic people	Proximity One
District * insurgent	District percent white: insurgent white	Interaction between district percent white (immediately above) and if the insurgent is white (immediately below)	Proximity One; Ballotpedia; campaign websites, candidate social media
Insurgent	Insurgent white	Dummy variable. 1 if challenger is white, 0 if not	Ballotpedia; campaign websites, candidate social media
	Insurgent woman	Dummy variable. 1 if challenger is a woman, 0 if not.	Ballotpedia
	Insurgent times run	Number	Ballotpedia

	Insurgent fundraising	Number that is challenger total fundraising – self-contributions in pre-primary FEC reports, measured by $10,000 increments	Federal Election Commission
	Justice Democrats	Dummy variable. 1 for endorsement, 0 if not	Ballotpedia and Wikipedia
	Brand New Congress	Dummy variable. 1 for endorsement, 0 if not	Ballotpedia and Wikipedia
	Our Revolution	Dummy variable. 1 for endorsement, 0 if not	Website and Just.Facts
	Working Families Party	Dummy variable. 1 for endorsement, 0 if not	Just.Facts
	Sunrise	Dummy variable. 1 for endorsement, 0 if not	Website
	Democratic Socialists of America	Dummy variable. 1 for endorsement, 0 if not	Website and Political Revolution
	Number core endorsements	Number that is the total endorsements from core insurgent organizations	Calculated by author
	Previous elected office	Dummy variable. 1 for endorsement, 0 if not	Ballotpedia
Incumbent	Democratic incumbent	Dummy variable. 1 if Democrat, 0 if Republican or open seat	Ballotpedia
	Republican incumbent	Dummy variable. 1 for Republican, 0 if Democrat or open seat	Ballotpedia
	Incumbent years in office	Number	House of Representatives website
	Incumbent DW nominate score	Value between 0- -1, where -1 is a Democrat who always votes with the party and 0 is a Democrat who never votes with the party	Voteview
	Conservative/ moderate caucuses	Value between 0-2, where 0 is membership in none, 1 is membership in either the New Democrat or Blue Dog Caucuses, and 2 is membership in both	Caucus websites; Wikipedia
	Liberal caucuses	Value between 0-2, where 0 is membership in none, 1 is membership in either the Progressive or Medicare for All Caucuses, and 2 is membership in both	Caucus websites; Wikipedia

Incumbent Total Cosponsorship and Communications

The table below shows each variable in the regression analyses; how I operationalized it; and where the data are from.

Variable	Operationalized As	Data Source
Cook PVI	Values converted to be in relation to D+/-, e.g., D+16 = 16 and R+23 = -23	Cook Political Report
Progressive Caucus	Dummy variable	Progressive Caucus website
Medicare for All Caucus	Dummy variable	Wikipedia
New Democrats Coalition	Dummy variable	New Democrats website
Blue Dog Caucus	Dummy variable	Blue Dog Caucus website and Wikipedia
Challenged	Dummy variable	Calculated by author
Challenged percent	Value that is the percent of the primary vote that the challenger received	Ballotpedia

Incumbent Change in Insurgent Cosponsorship

The table below shows each variable in the regression analyses; whether it is dependent or independent; how I operationalized it; and where the data are from.

Dependent or Independent	Variable	Operationalized As	Data Source
Dependent	Change Before/During, all insurgents	Change in number of all elected insurgent bills incumbent cosponsored/total insurgent bills before and during primary challenge	Congress.gov
	Change Before/During, Squad+ insurgents	Change in number of Squad+ bills incumbent cosponsored/total insurgent bills before and during primary challenge. Squad+ are Ocasio-Cortez, Pressley, Bush, Omar, Bowman, Newman, Jones, and Tlaib	Congress.gov
	Change Before/After, all insurgents	Change in number of all elected insurgent bills incumbent cosponsored/total insurgent bills before and after primary challenge	Congress.gov
Independent	Cook PVI	Values converted to be in relation to D+/-, e.g., D+16 = 16 and R+23 = -23	Cook Political Report
	Number of liberal caucuses	Value between 0-2 that is how many of the Progressive and Medicare for All caucuses the incumbent is a member of	Calculated by author
	Number of moderate/ conservative caucuses	Value between 0-2 that is how many of the New Democrats and Blue Dog caucuses the incumbent is a member of	Calculated by author
	State with 2018 insurgent defeat of incumbent	Dummy variable	Calculated by author
	Number of 2020 insurgents	Value that is the number of progressive insurgents running against the same incumbent at the same time	Calculated by author
	Challenger(s) percent in 2020	Value that is the percent of the primary vote that the challenger received; Combined percentage if multiple challengers	Ballotpedia
	Challenger percent in 2018	Value that is the percent of the primary vote that the challenger received; Combined percentage if multiple challengers	Ballotpedia

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