Towards a more nuanced understanding of right-wing populism

Causes, consequences, and counter-measures

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My overarching argument

1. Mainstream parties **have struggled to hold their electoral coalitions together as the cultural dimension** has become more salient.
2. **Economic factors and cultural ones interact**, though scholars differ in which factor they deem primary.
3. **Issue salience** and **valence perceptions** matter at least as much, if not more, as attitudinal change in explaining electoral changes.
4. **Electoral systems** influence whether populism manifests itself through new parties or through takeovers of existing ones.
5. The **decline of "intermediary organisations",** such as unions and churches, has weakened mainstream parties' capacity to represent voters effectively and increases the incentive for myopic policymaking.
6. When in office, right-wing populists (RWP) **undermine democratic institutions**.
7. Populist policies **rarely improve welfare**, but they can still **pay off politically**.
8. While **accommodating the RWP** on immigration *can* yield net electoral gains in the short term, over the longer term these are likely outweighed by the indirect effect on normalisation.
9. **Cordon-sanitaire strategies** help limit the damage that RWP do, but they are difficult to maintain when parties face incentives to defect.
10. RWP is here to stay; **countermeasures should prioritise containing institutional damage**, rather than trying to turn back the clock. The good news is that there are some low-hanging fruits; the bad news is that we largely lack solid evidence about how effective reaping these will be.

Agenda

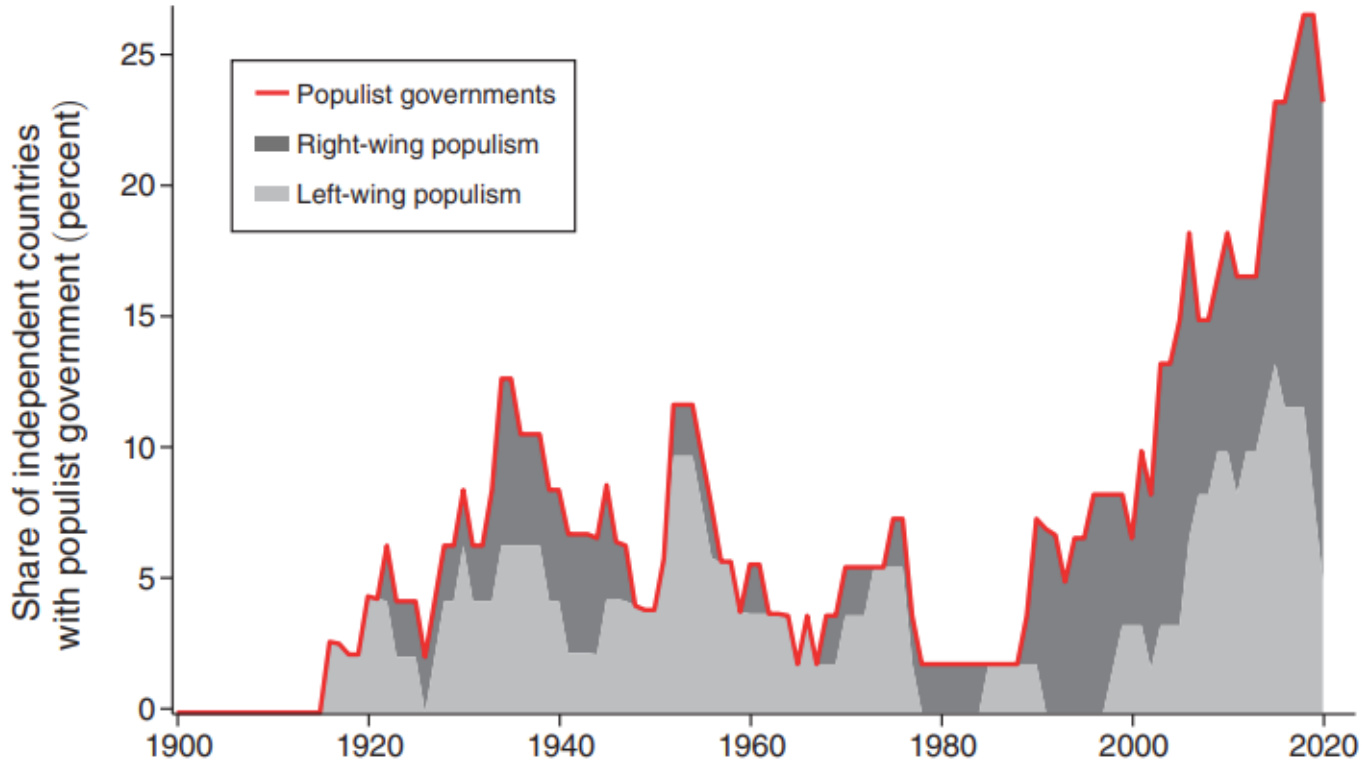
1. The rise of right-wing populism (RWP): Definitions and stylised facts
2. Explanations for the emergence of RWP forces
3. The consequences of RWP
4. What if, anything, can we do about countering RWP?

Defining (right-wing) *populism*

- Populism: Mudde's "thin definition" is dominant in the literature
  - Mudde (2004, 543) defines populism ***'as a thin-centred ideology that considers society to be (…) separated into two homogeneous and antagonistic groups, the pure people and the corrupt elite, and which argues that politics should be an expression of the general will of the people.'***
    - Thin = compatible with different host ideologies (Marxism, communism, anarcho-libertarianism, etc.)
  - Wuttke et al. (2020) offer some extremely helpful guidance on how to properly operationalise definitions of populism
- **Right-wing populists adds nativism** – the commitment to protecting the native in-group (Noury and Roland 2020)
- Lecture's scope: Mainly **Europe in the post-Cold War period**, partly because the evidence is best for that region and, partly, because of my biases
  - Hopefully, some of the points we discuss can help you think about populism in other regions that you are primarily interested in

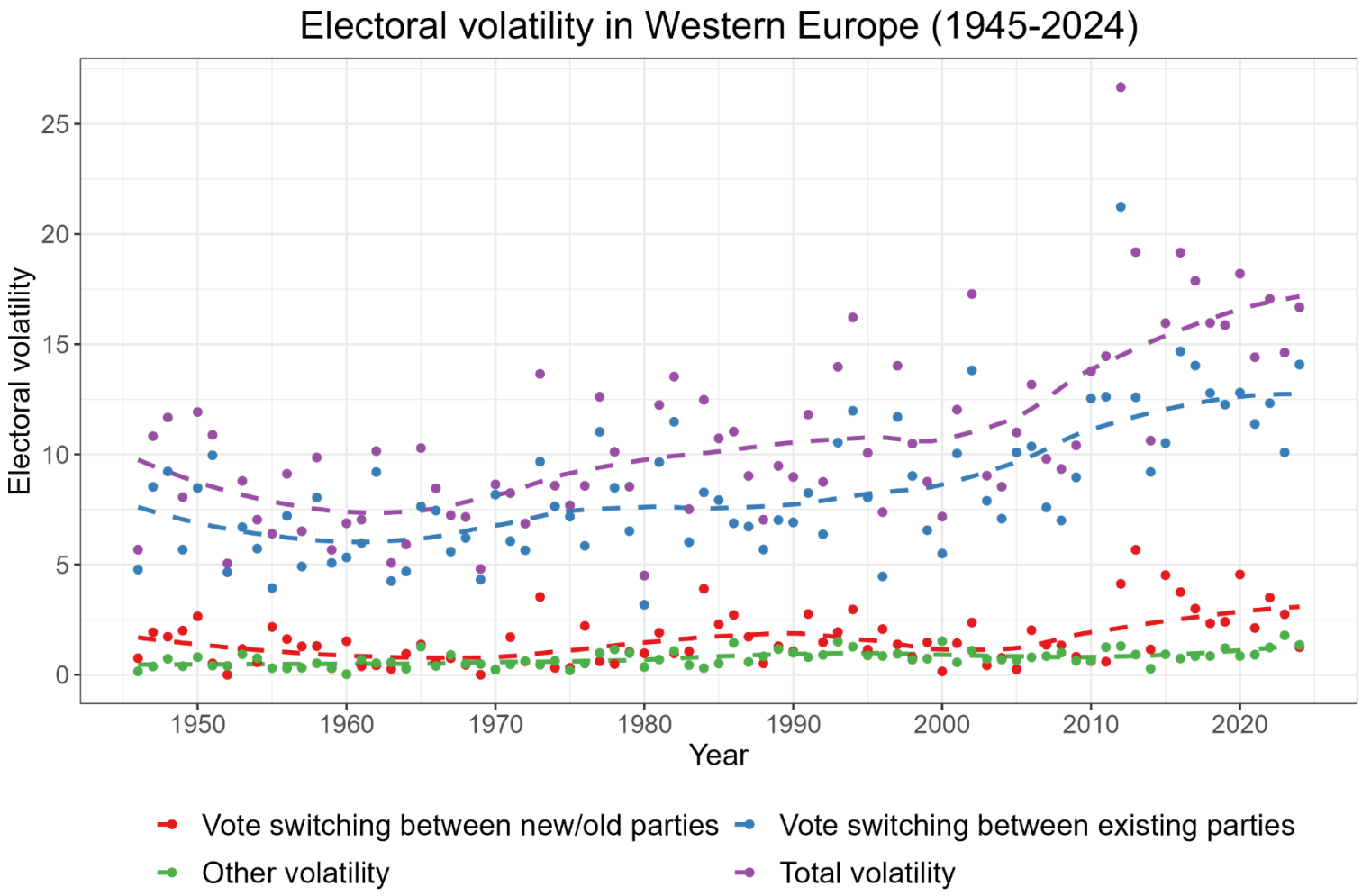
Stylised fact #1: The rise of RWP is not just a Western phenomenon, and it is unprecedented by the standards of the last 120 years or so

Share of populist (heads of) government in 60 countries, 1900-2020



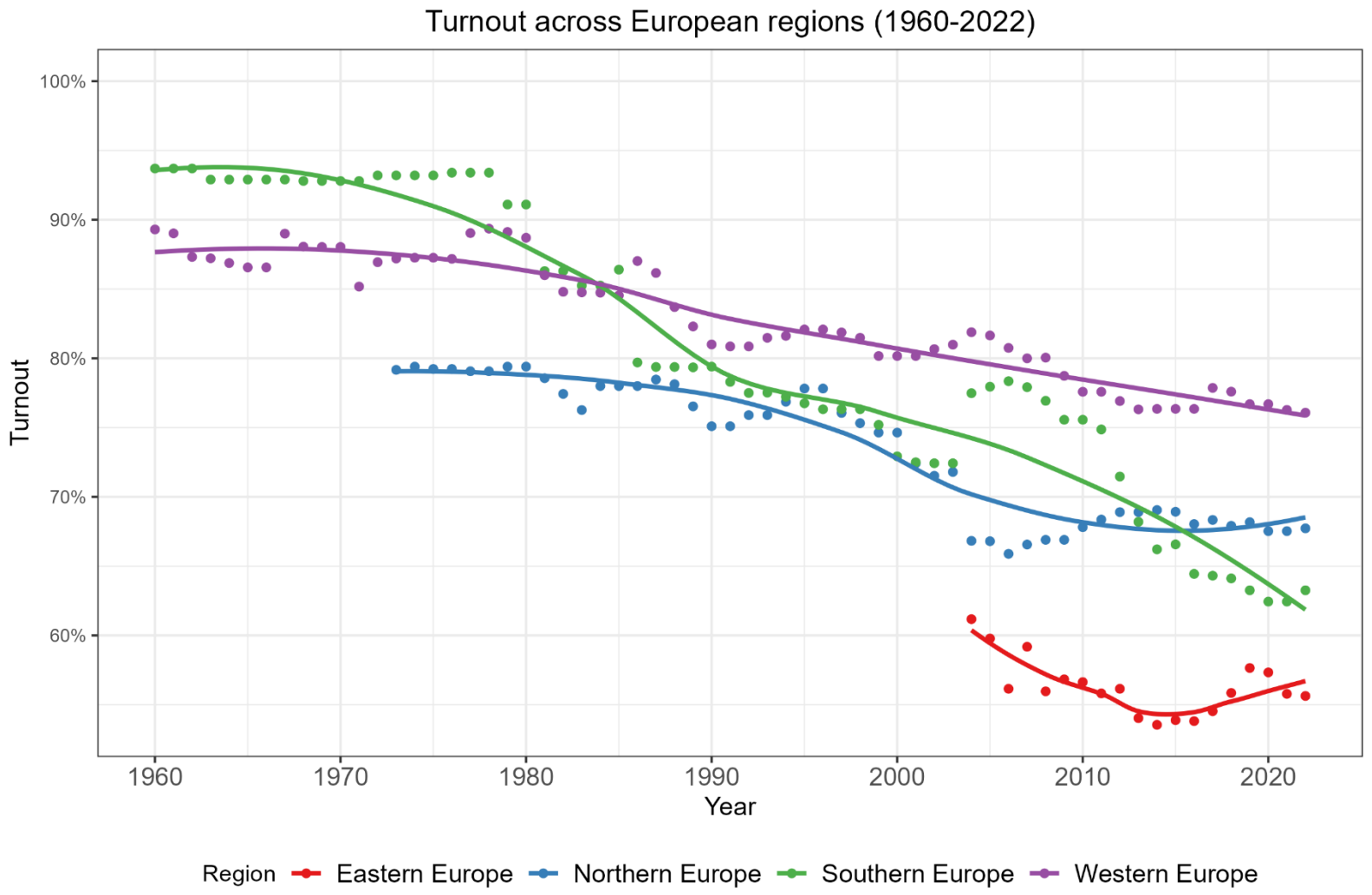
Funke et al. 2023

Stylised fact #2: Vote switching has increased substantially over the past 25 years (more floating voters, somewhat more entry and exit by parties)



Emanuele EV data

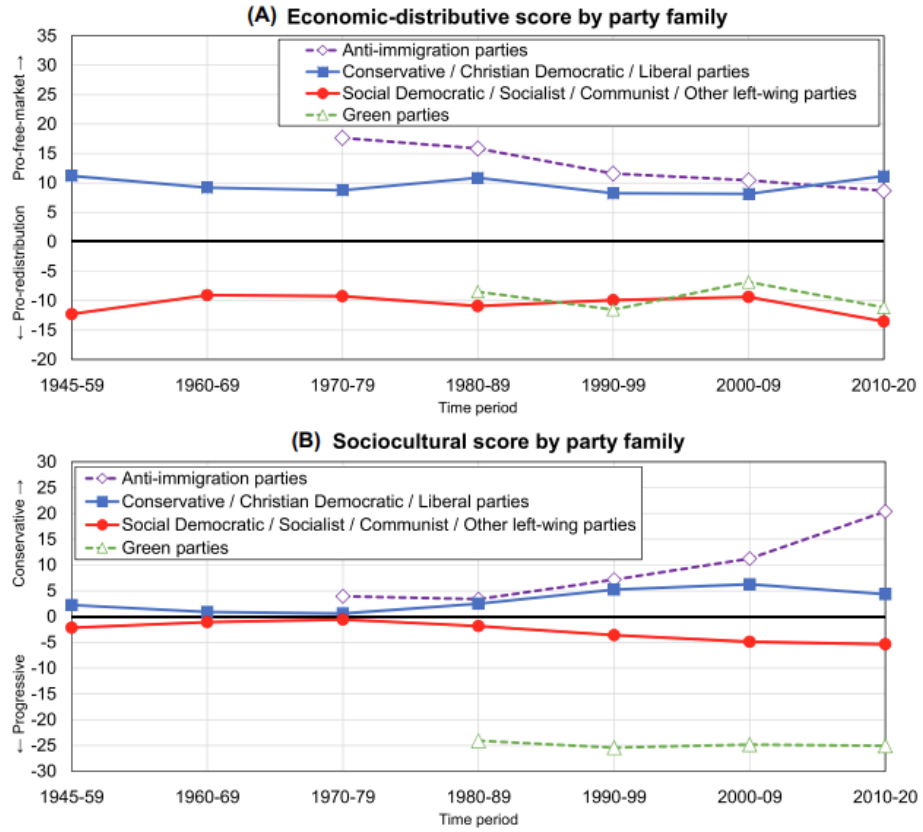
Stylised fact #3: Turnout has declined across many advanced industrialised democracies



CPDS

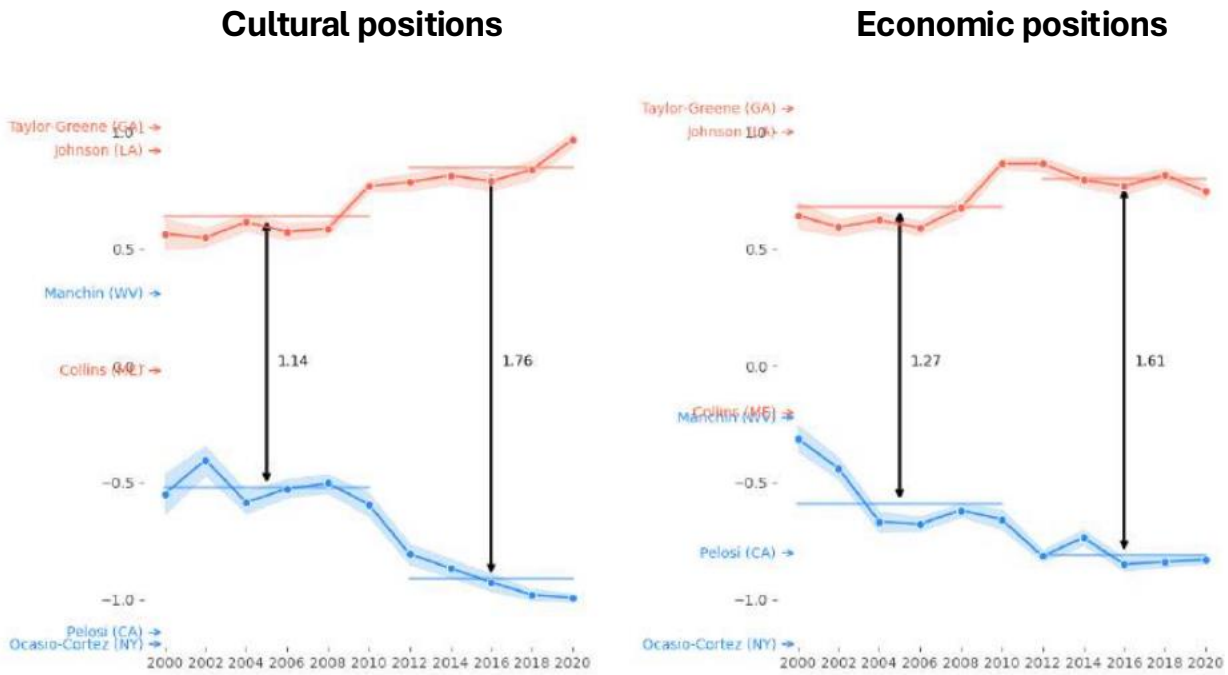
Stylised fact #4: From convergence on the economic dimension to polarisation on the cultural one

Evolution of ideological polarisation in Western Democracies



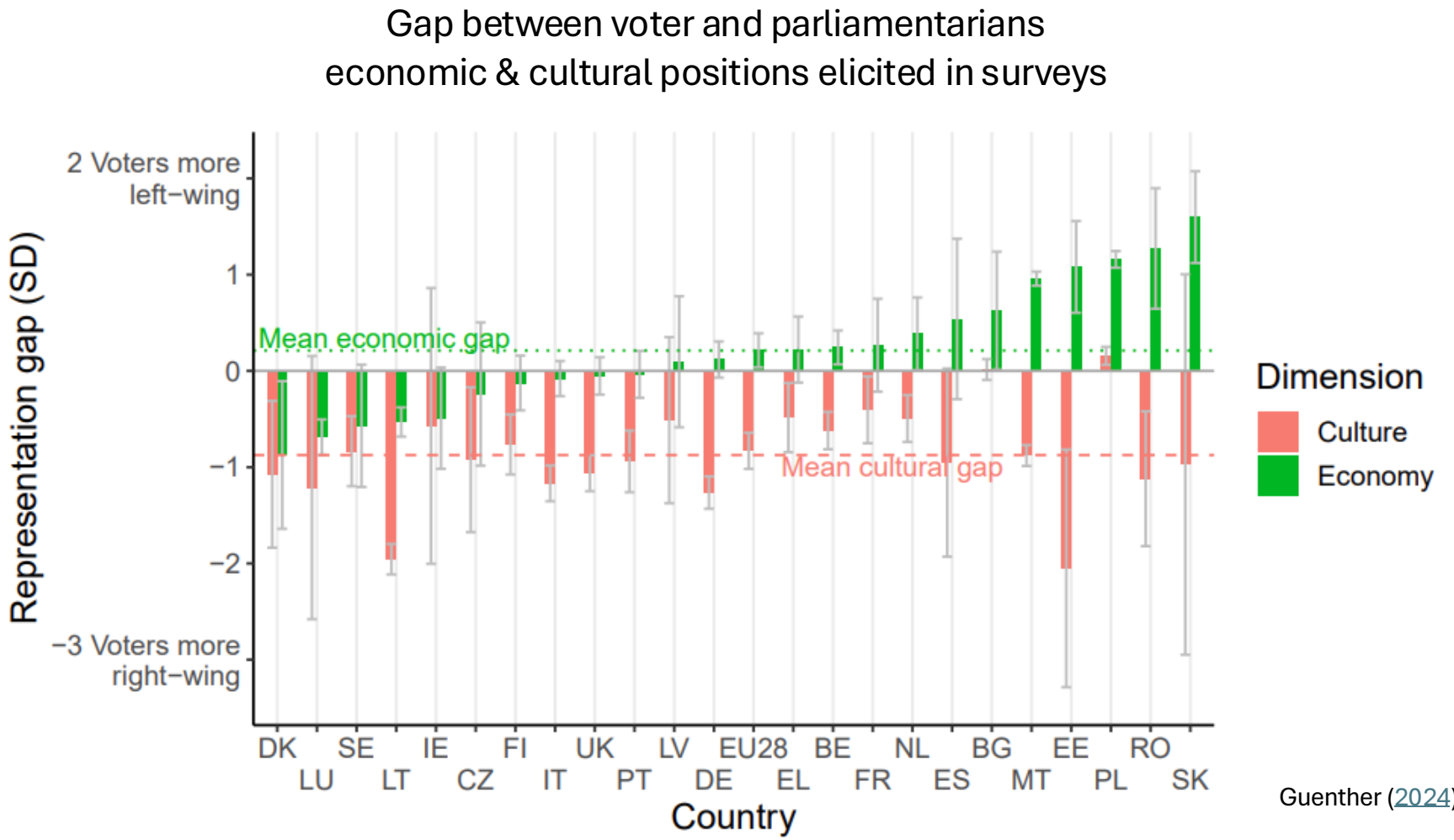
Gethin et al. (2022), based on Manifesto data

US Republicans vs. Democrats: Increasing polarisation, 2000-2020



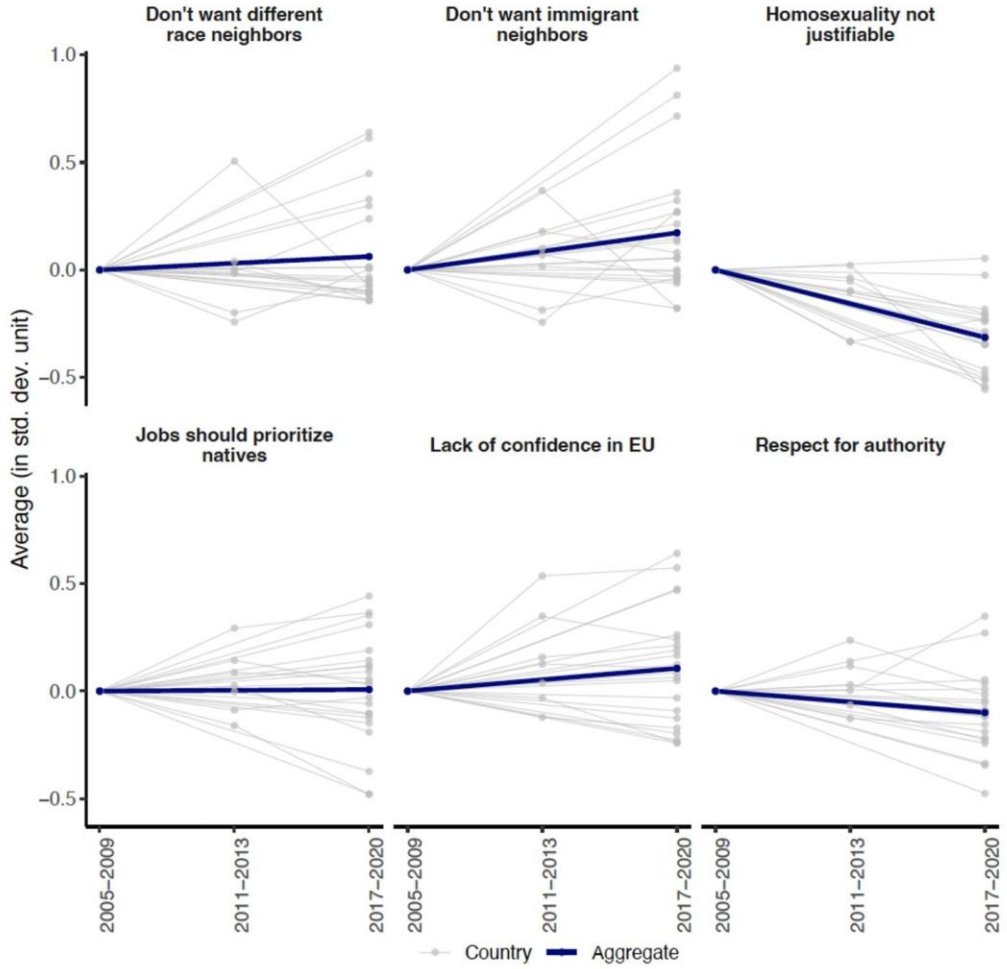
Longuet-Marx (2024)

Stylised fact #5: Representation gaps tend to be greater on the cultural dimension for mainstream parties, compared to the economic one

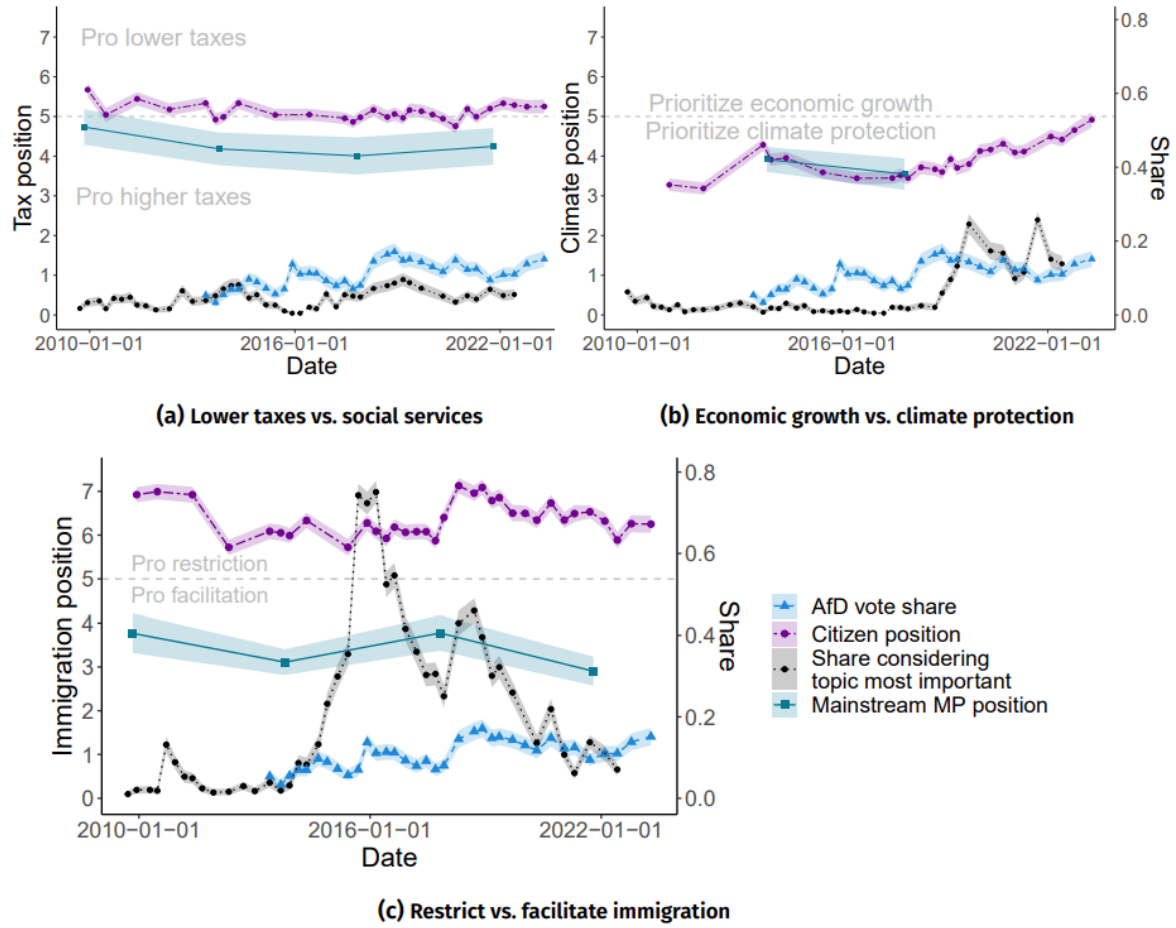


Guenther (2024)

Stylised fact #6: On average, the attitudes of voters on the cultural dimension have changed little, though the salience of that dimension has increased



Danieli et al. (2024)



Guenther (2024)

Stylised fact #7: The electoral coalitions of centre-left and centre-right parties have changed considerably – aka the educational re-alignment

- It used to be the case that education and income reinforced each other:
  - **Centre left/social democratic parties** drew their electoral support **from lower-income voters, with relatively low education** (typically not more than secondary)
  - **Centre right**/conservative/Christian democratic parties drew their support from **higher-income voters, with relatively high education**
- Over the last three decades, education and income have developed into non-colinear factors (Gingrich and Haeusermann 2015, Gethin 2022, Kitschelt and Rehm 2023, Longuet-Marx 2024):
  - Centre left: high education + low to medium income
    - Not an easy coalition to hold together
  - Centre right: high income (lots of variation across education)
  - Radical right: low education (lots of variation across income)
  - Greens: high education (lots of variation across income)

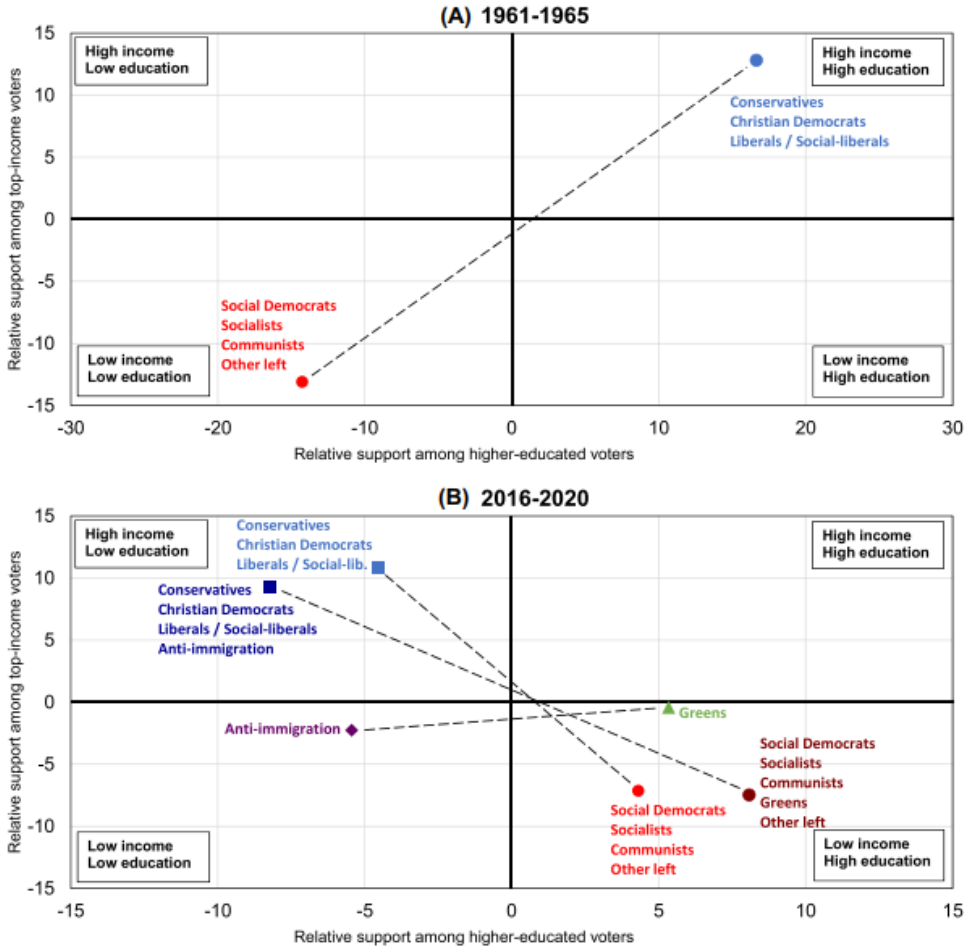
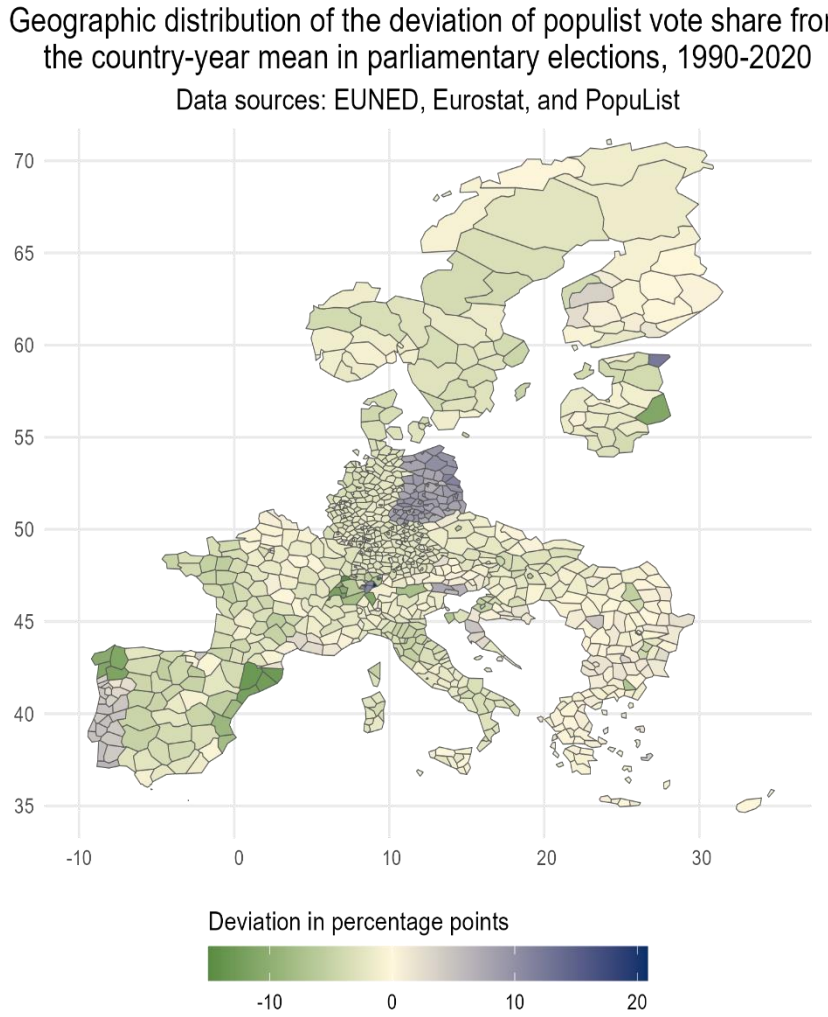


FIGURE VI

The Fragmentation of Political Cleavage Structures

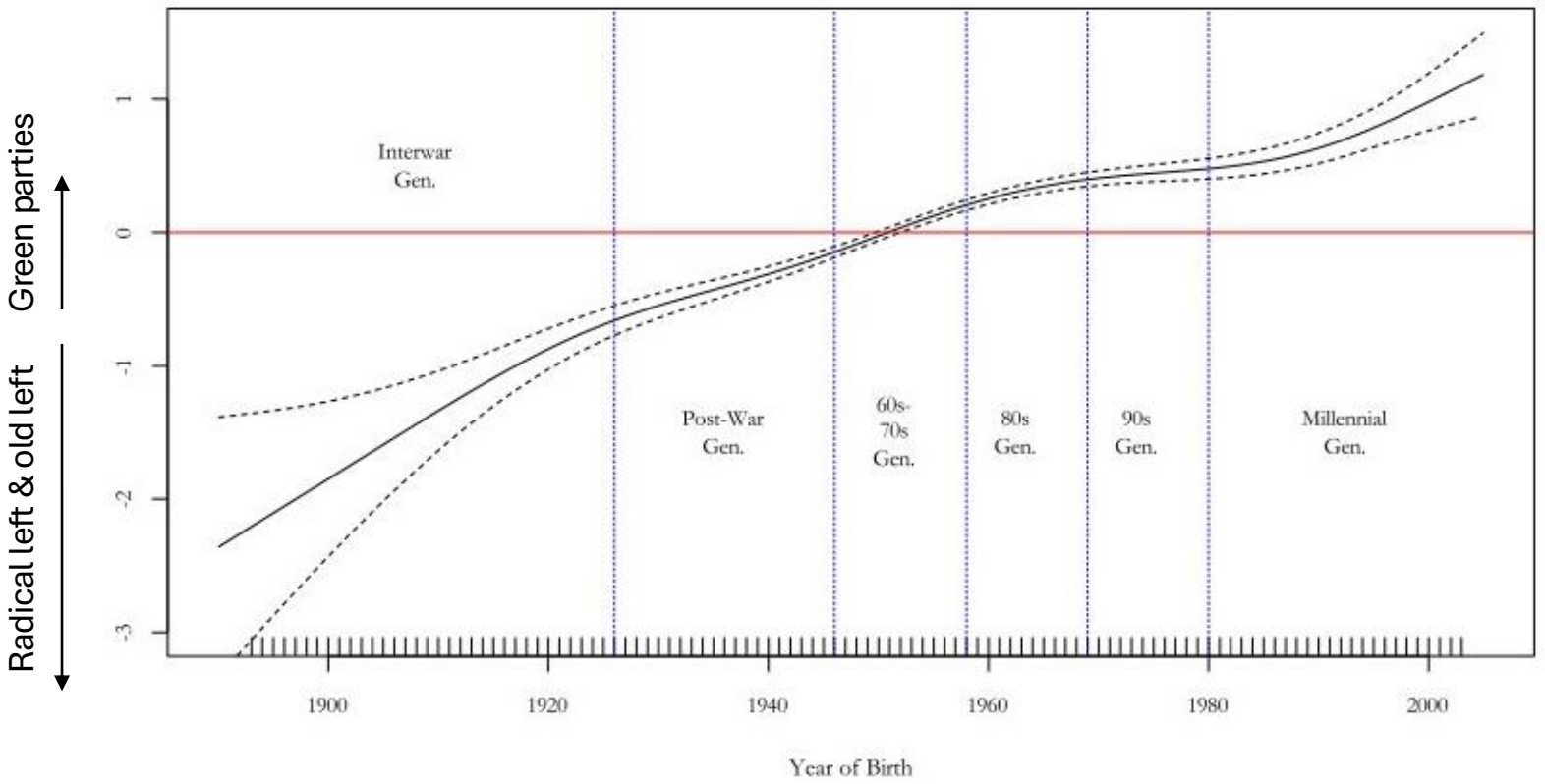
Gethin et al. (2022)

Stylised fact #8: Support for the populists exhibit considerable regional heterogeneity within countries



Stylised fact #9: The decline of mainstream parties, especially the “old” left, is partly due to generational replacement or “cohort effects”

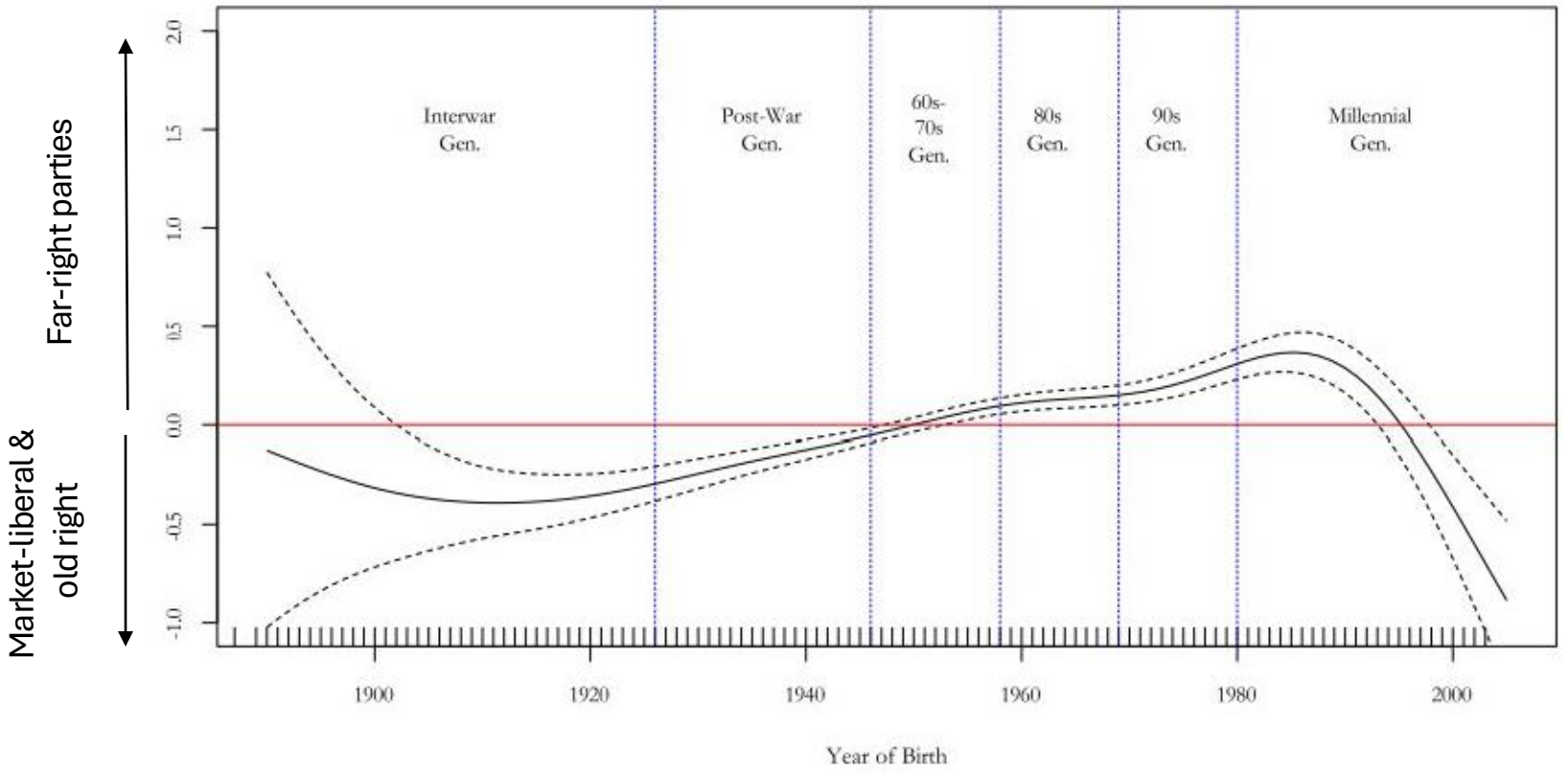
Age cohort political left vs. green political party preference in 10 European countries



Mitteregger (2024)

Stylised fact #9: Cohort effects also matter for the decline of the mainstream right, though the relationship is non-linear (cont'd)

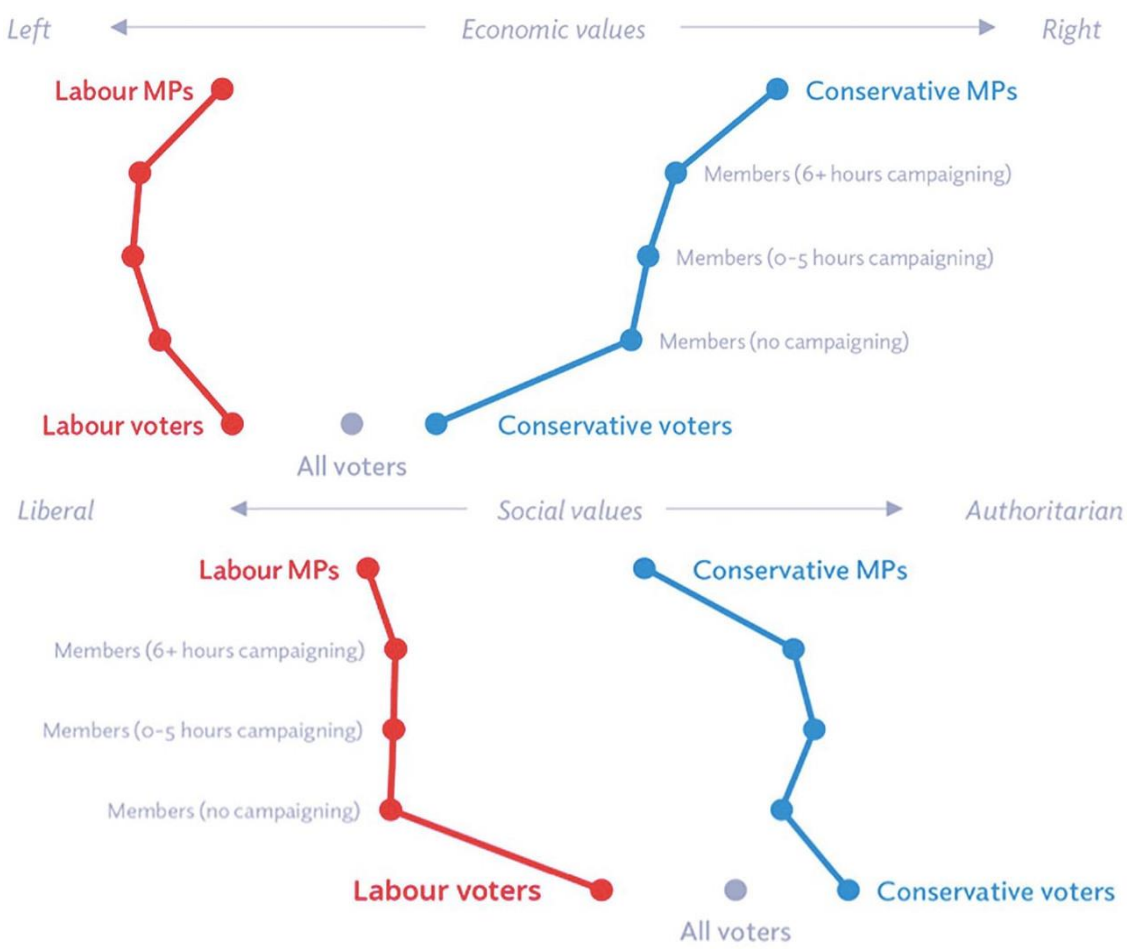
Age cohort market-liberal & old right vs. far-right political party preference in 10 European countries

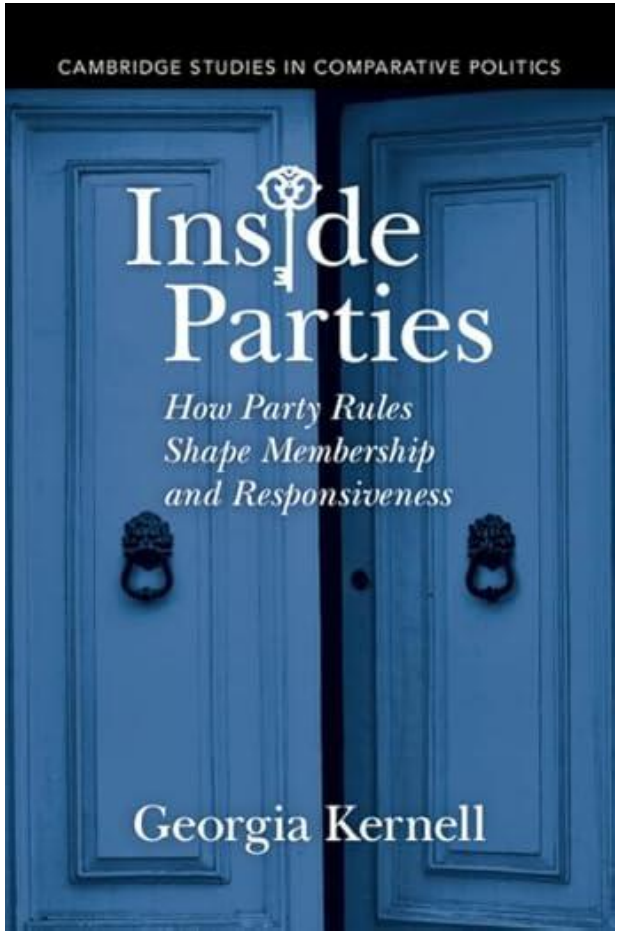


Mitteregger (2024)

Stylised fact #10: Parties have, on average, become more decentralised – May's law strikes back

- Decentralisation = granting more power to party members over, for instance, leadership selection
  - Kernell documents that, while there is variation, this trend has been fairly uniform
- **Pro:** can help galvanise activists and improve campaign effort (Aldrich!)
- **Con:** Members tend to hold pretty extreme values – both relative to the party's voters and all voters (see Wager et al. 2022 for illustration in British case)





Wager et al. 2022

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Preliminary point: What does a good explanation look like?

1. Clear explanandum (combinations possible, but important to be explicit about this)
    - Cross-country variation in RWP support
    - Within-country, regional variation in RWP support
    - Within-country, temporal variation in RWP support
    - Individual-level variation in RWP support or attitudes

2. Depending on explanandum, explanatory factors must make sense from a comparative perspective.
    - Theories must be able to explain why some countries/regions/individuals support RWP more than others, or why RWP is, on average, higher during some periods than others.

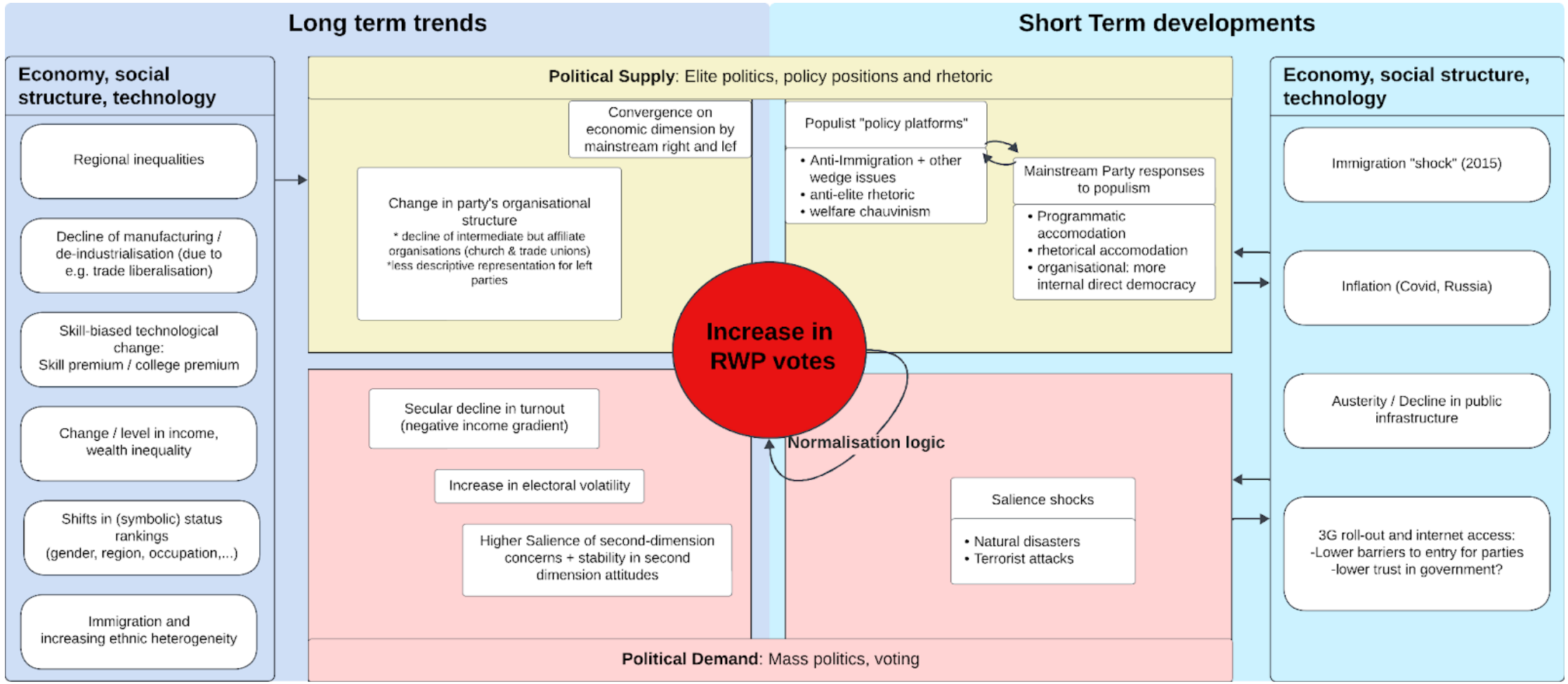
3. The explanatory factor(s) must be such that the causal mechanism(s) through which the reduced-form effect is engendered is **transparent**.

4. The stylised facts outlined above offer a good starting point for trying to construct such an explanation

Some popular, but at the very least incomplete, if not bad, explanations

Explanandum	Explanatory variable	Problem(s) / puzzle(s)
Cross-country variation in RWP support	It's all about income inequality (in the cross section).	Why do we observe RWP being successful in countries and regions where **inequality has increased very little** (e.g. France, Germany)?
Within-country, temporal variation in RWP support	The white majority fears that it will become the minority soon → nativist backlash	Might be true in the US, but this kind of "trigger point" doesn't travel well, i.e. **doesn't apply in most countries where we observe RWP success**.
Within-country, regional variation in RWP support	It's all about "the revenge of the places that don't matter" (Rodriguez-Posse 2018).	**Causal mechanisms not transparent** (setting aside concerns about identification): which regional shocks cause an increase in RWP, over what time scale, and why?
Individual-level variation in RWP support or attitudes	It's all about people being tribal us-versus-them creatures and rejecting non-native outgroups (Haidt).	Personality traits are rather stable over time and **constants can't explain temporal change**. So, at the very least, some activating factors must be theorised, and these must be generalisable to other contexts.
	It's all about trust as a personality trait – both at the interpersonal level and in the political system.	Temporal variation within individuals unlikely to be captured, **but causal mechanisms also remain obscure:** what causes trust?

Overview of the literature on the causes of populism



I. Demand-side explanations

I.I Economic

I.II Cultural

I. Demand-side explanations

I.I Economic

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Economic explanations for the rise of RWP

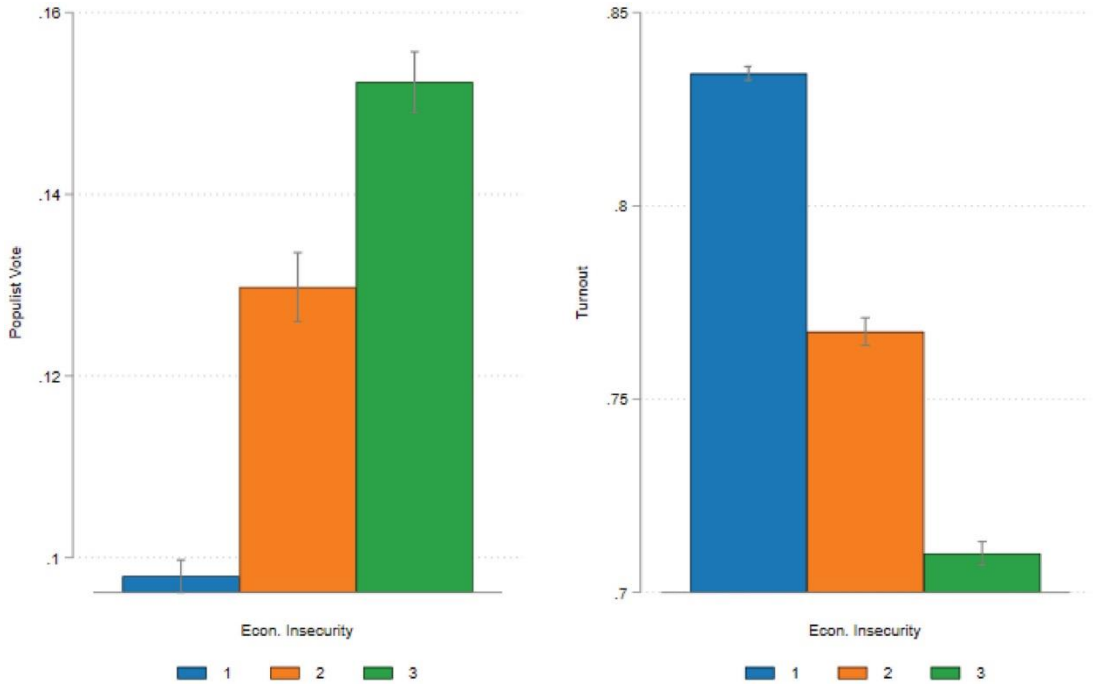
- Central idea: demand for populism is driven by the uncompensated (or insufficiently compensated) losers from economic shocks (Eichengreen 2018, Bisbee et al. 2020, Rodrik 2021, Walter 2021, Guriev and Papaioannou 2022) or those facing heightened economic insecurity because of these shocks (Milner 2021, Guiso et al. 2024)
  - **Trade liberalisation** and **import competition**, e.g. the "China shock" (Colantone and Stanig 2018, Autor et al. 2020, Backer and Mueller 2024)
  - **Austerity** (Fetzer 2019, Fetzer et al. 2023, Duque et al. 2023, Huebscher et al. 2021, 2023, Baccini and Sattler 2024, Alesina et al. 2024, Cremaschi 2025a,b, Dickson et al. 2025)
  - **Automation** (Boix 2019, Gingrich 2019, Kurer 2020, Anelli et al. 2021)
  - **Immigration** – e.g. because of labour market competition (Fetzer and Becker 2016, Halla et al. 2017, Edo et al. 2019, Dustmann et al. 2019, Bolet 2020) or competition over welfare state benefits (Cavaillé and Ferweda 2023) → will return to cultural explanation below
- Translating the simple story into concrete predictions:
  - **Cross-country/cross-region**: RWP should be weaker in countries/regions that were either less affected by these adverse economic shocks or, holding the level of exposure constant, offered more "effective" compensation to the losers.
    - For a more nuanced take (though not one I entirely agree with), see Rodrik (2018) and Manow (2018).
  - **Temporal**:
    - Strong version: The rise of RWP started after these adverse economic shocks began to hit regions/individuals. Weak version: The rise of RWP accelerated after these adverse economic shocks began to hit regions/individuals.
  - **Individual**: Individuals that are both directly affected and have received insufficient compensation to neutralise the negative distributive consequences of these economic shocks.

Complicating this simple theory

- The simple theory's regional-level predictions are borne out by the data – and so is the weak version of its prediction for temporal variation (RWP rise *accelerates* following these economic shocks). So, we have a parsimonious theory that can explain substantively important portions of the variation.
  - Might sound trivial, but it's difficult to construct such theories
- Yet, there are at least four individual-level puzzles / challenges that explain why most authors put forward somewhat more complicated versions of the economic "story".
  1. For which individuals do negative economic shocks have a ***(de-)mobilising* effect** (more/less likely to turn out)?
  2. Which **individuals in adversely affected regions** are most likely to turn to RWP – directly, indirectly, or unaffected ones?
  3. Why would individuals turn to RWP after experiencing a negative distributive shock, given that RWP rarely offer more redistribution / compensation than left-wing parties?
  4. What about **individuals' expectations about their future material prospects** (e.g. upward/downward mobility)?

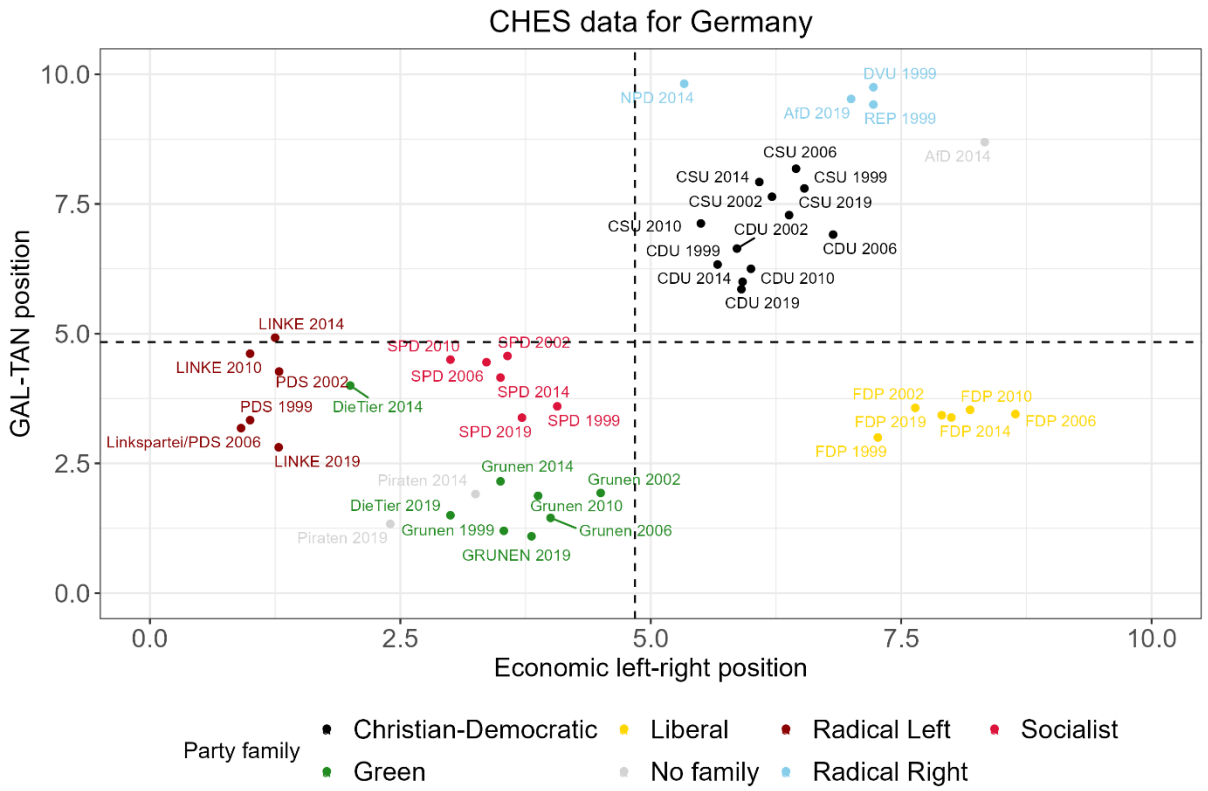
Challenges #1 and #2: Economic insecurity and turnout

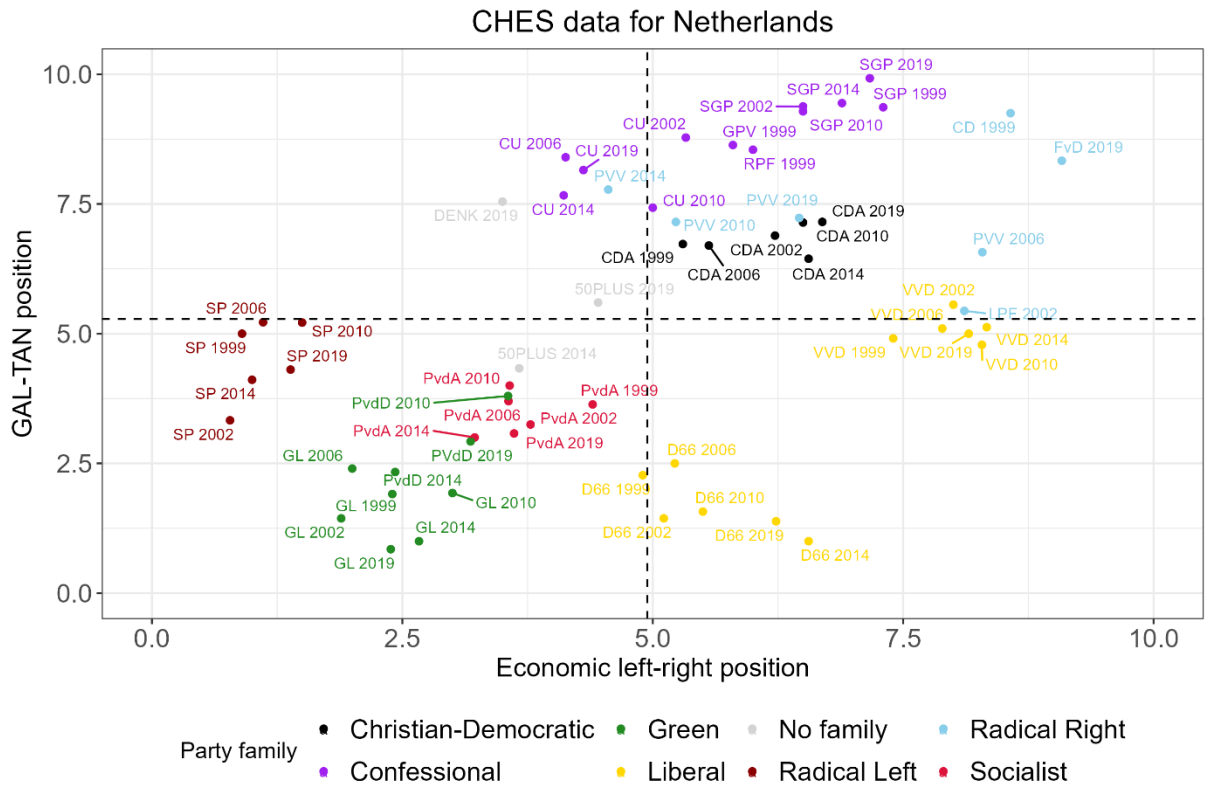
- Guiso et al. (2024) argue (using a rain-based IV, which should make us cautious about placing too much emphasis on these results → Mellon 2024) that economic insecurity has both ***negative* effect** on turnout and a ***positive* effect** on populist vote share.
- Conceptually especially important for thinking about regional-level results. Now there are **four effects**: Change in
  - voting behaviour for those that do vote,
  - attitudes,
  - composition of voters due to shock, and
  - salience of different dimensions.
- Crucial for avoiding the **ecological fallacy**:
  - inferring individual-level relationships from regional-level ones (just because affected regions vote in some way in the aggregate doesn't mean that affected individuals in these regions drive this)
- Finally: might help account for the fact that **regional-level estimates tend to be stronger than those based on individual-level exposure**
  - Aside from fact that direct and indirect (regional, but not individual exposure) effects can accumulate



Guiso et al. (2024): Populist vote share and turnout (based on ESS data) by economic insecurity tercile (1 = low; 3 = high)

Challenge #3: Why turn to right-wing populists in the wake of negative distributive shocks, given their lukewarm stance on redistribution?

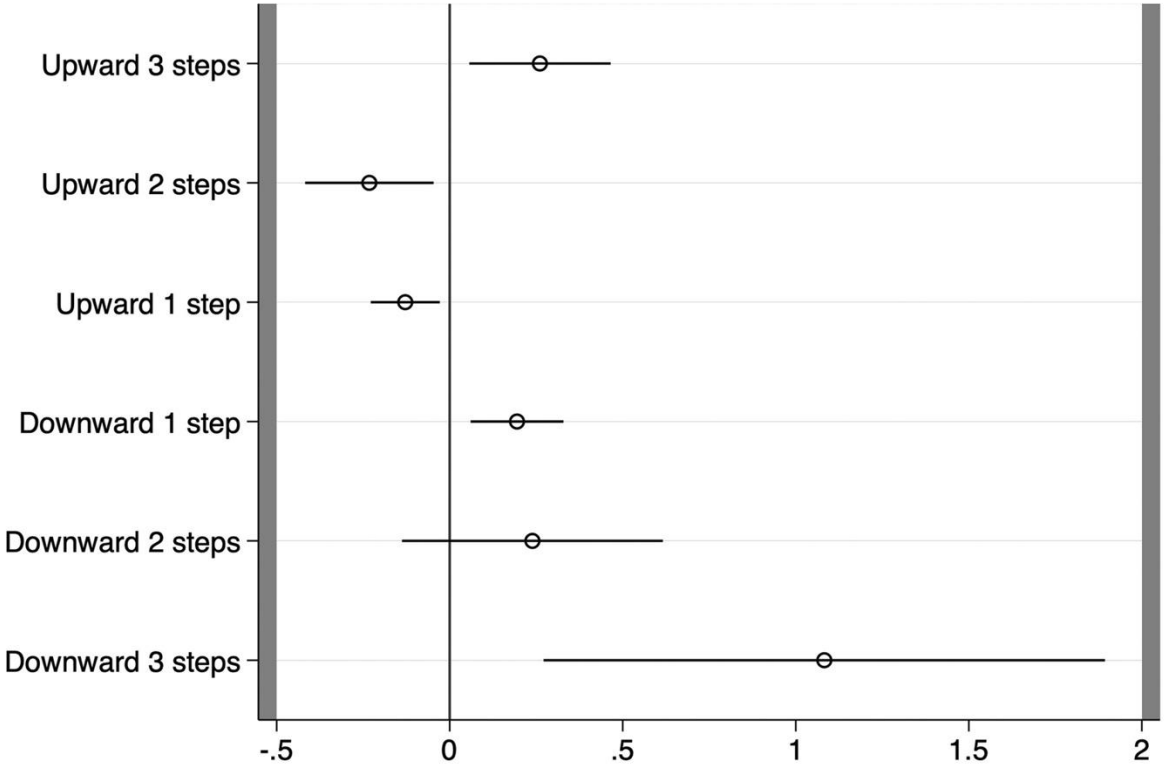




Some tentative answers

1. Shayo-type (2009, 2020) argument (see Edenhofer and Edenhofer 2025)
   - Adverse economic shocks might make it more attractive for **working class people to shift their identification from class to nation** → assumes that RWP are those that are perceived as putting forward the "best" offer to boost the nation's relative status
     - Possible, but difficult to evaluate because endogenous identity choice is tricky to capture empirically
2. Low trust in mainstream parties' compensatory/redistributive promises
   - Possible, but requires explanation as to **why RWP are seen as more credible *on redistribution*** (e.g. better descriptive representation) – otherwise, causal mechanism(s) unclear
3. While RWP do not advocate for redistribution and compensation in general, they do advocate for **welfare chauvinism – the narrowing of welfare state benefits only to the native in-groups** (e.g. "white" Germans).
     - Possible, but difficult to estimate systematically, partly because we have no good measure of welfare chauvinism exhibited by RWP manifestos (see Rathgeb 2024 for illuminating case studies)
   - This modification implies that adverse economic shocks should make those individuals more likely to turn to RWP whose:
     - Demand for redistribution goes up and
     - **They believe that out-group members deprive them of benefits or that their contributions go disproportionately to out-group people who deserve benefits relatively less than in-group members**

Challenge #4: Expectations about future material prospects matter



Notes: Log odds with 95% confidence intervals from anti-system right, with controls for occupation, age, sex, mobility, ESS round and country dummy, whether ethnic minority, belonging to a religion.

McNeil (2024)

See also: Kurer (2020), Van Staalduinen and Kurer (2022), Jacobs and Kayser (2025), Ferwerda et al. (2025)

Economic explanations: Brief summary

- **Main strength**: sheds light on regional variation in RWP and can help explain (see Scheiring et al. 2024 for a meta-analysis)
  - Acceleration over time (but not the onset of populism), and
  - Some portion of the cross-country variation
- **Weaknesses**: The empirical support for its (at least in its most parsimonious form) predictions regarding individual-level variation is decidedly weaker than for regional variation.
  - Worth noting that effect sizes tend to be small / moderate (usually somewhere between 1 and 5 percentage points).
  - Margalit (2019) argues that, as a result, these explanations *fail* to explain the levels of RWP support (e.g. Why are ~40-50% of US voters willing to vote for Trump?); they can only explain small changes around these levels. Convincing?
- Suggests simple focus on exposure to economic shocks is **insufficient for comprehensive understanding of RWP**. Instead, we need to bring in other factors:
  - Economic ones: **interaction between exposure and nature/level of skills**, labour market position (Schwander and Manow 2017), relative exposure to, for instance, partner (Abou-Chadi and Kurer 2021, Zucker et al. 2024, Bergvall 2024), etc.
  - Non-economic/cultural ones: Identity, trust, perceptions, etc.

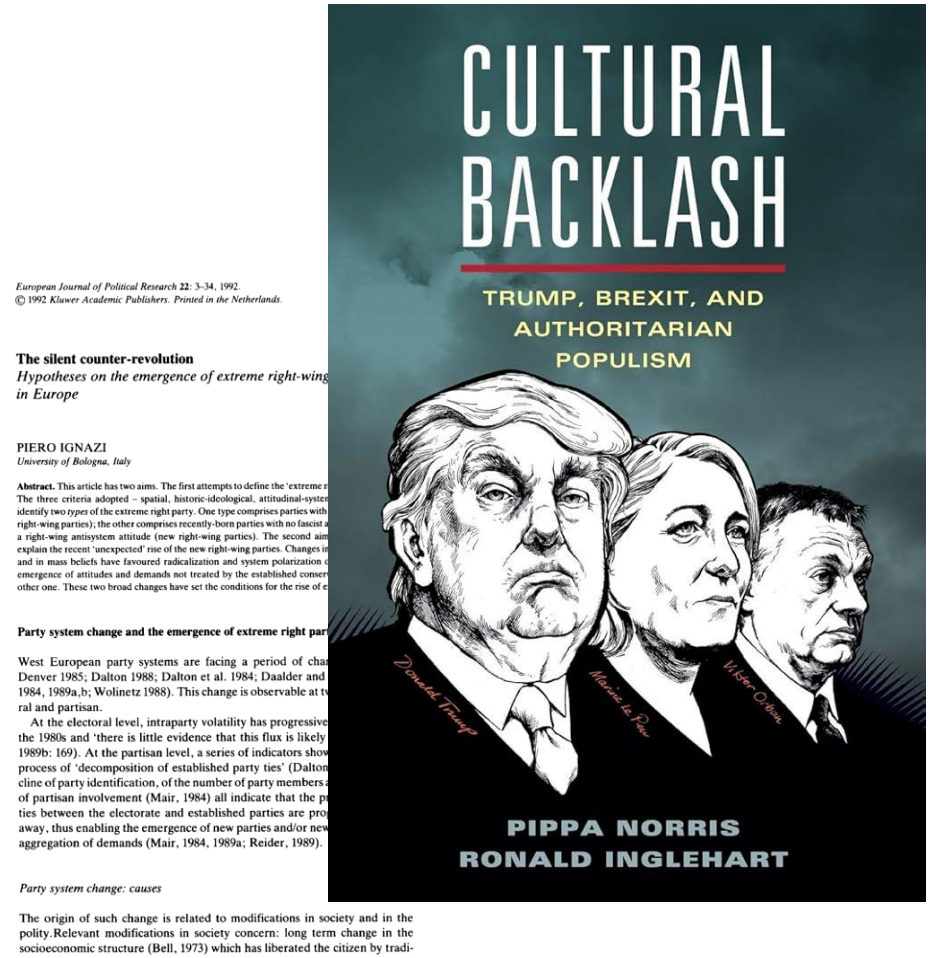
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Cultural explanations – main "competitor" of economic explanations

- **Main thrust**: Populists draw their support from older generations, who seek to push back against the post-WWII value shift from materialist to post-materialist values.
  - These post-materialist values include LGBTQI rights, diversity, and multiculturalism. **Such values tend to be at loggerheads with populists' Manichean view of society, which is why those objecting to the rise of post-materialist values turn to populist parties.**
- David Art (2022) takes an extreme, but instructive, view:
  - "The central debate over the rise of the radical right was between proponents of the "losers of modernization" and the "cultural backlash" theses. The former view economic change as fundamental **while the latter understand cultural backlash primarily as anti-immigrant sentiment**. …. Suffice to say that even the most skillful efforts at injecting political economy into radical right voting have consistently failed to demonstrate the centrality of economic anxiety…"



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The silent counter-revolution
Hypotheses on the emergence of extreme right-wing in Europe

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Abstract. This article has two aims. The first attempts to define the 'extreme r
The three criteria adopted – spatial, historic-ideological, attitudinal-syste
identify two *types* of the extreme right party. One type comprises parties with
right-wing parties); the other comprises recently-born parties with no fascist a
a right-wing antisystem attitude (new right-wing parties). The second aim
explain the recent 'unexpected' rise of the new right-wing parties. Changes i
and in mass beliefs have favoured radicalization and system polarization
emergence of attitudes and demands not treated by the established conser
other one. These two broad changes have set the conditions for the rise of e

Party system change and the emergence of extreme right par

West European party systems are facing a period of cha
Denver 1985; Dalton 1988; Dalton et al. 1984; Daalder and
1984, 1989a,b; Wolinetz 1988). This change is observable at t
ral and partisan.
At the electoral level, intraparty volatility has progressive
the 1980s and 'there is little evidence that this flux is likely
1989b: 169). At the partisan level, a series of indicators sho
process of 'decomposition of established party ties' (Dalton
cline of party identification, of the number of party members
of partisan involvement (Mair, 1984) all indicate that the p
ties between the electorate and established parties are pro
away, thus enabling the emergence of new parties and/or ne
aggregation of demands (Mair, 1984, 1989a; Reider, 1989).

Party system change: causes

The origin of such change is related to modifications in society and in the polity.Relevant modifications in society concern: long term change in the socioeconomic structure (Bell, 1973) which has liberated the citizen by tradi-

Translating the simple cultural-backlash theory into (concrete) predictions

1. Cross-country and cross-regional variation
   - RWP should be strongest in countries and regions where the "cultural threat", notably that induced by immigration or fears about one's own ethnic group being in the minority, is greatest.
2. Temporal variation
   - Strong version: RWP should emerge when cultural threat becomes salient
   - Weak version: RWP's rise accelerate after events / episodes that raise salience of cultural threat
3. Between and within individual-level variation
   - Personality traits / attitudes
     - Those holding deeply ingrained xenophobic, illiberal, nativist, etc. attitudes should be most likely to support RWP, or when these attitudes become more important to individuals.
     - Those with low levels of trust – both interpersonal and in the government, the political system, experts, etc.
   - Generation
     - Those belonging to older generations are more likely to hold such attitudes given their socialisation. There should thus be a negative age gradient for RWP support.

Testing the “cultural backlash” thesis empirically – two preliminary points

1. “Cultural backlash” is not randomly assigned across countries, and it is difficult – depending on the exact operationalisation – to isolate plausibly exogenous variation.
    - The **observational evidence** is almost completely correlational.
    - The **experimental evidence** can, in some instances, be interpreted causally, but only stripped-down conceptualisations of “cultural backlash” can be tested experimentally.
2. It is difficult, albeit vital, to set out how the independent variable – “cultural backlash” – is to be **operationalised** and, in doing so, one should satisfy the following criteria:
    - Retain **comparative leverage**
        - Variable should explain substantively important variation in more than one context
    - Retain clarity about **causal mechanisms**
        - The more (non-colinear) variables/survey items comprise the “cultural backlash” variable, the harder it is to understand the causal mechanisms
        - Note: When there is sufficiently large measurement error for sufficiently many items, correlation is almost certain to arise

Testing the “cultural backlash” thesis empirically (cont’d)

- Cultural explanations that fail the criteria in point 2 are either under-specified or of limited theoretical interest.
    - **Limited theoretical interest**: Possible, for instance, that some general trust variable is *most predictive* of supporting RWP across many countries/country-years. **But without explanation of determinants of general trust and its components, this finding has very limited value in helping us understand the causes of RWP.**
    - Note: Difference between and causality

→ There is (probably) something to the simple cultural story, but these points show that it is very easy to under-specify this theory or formulate it in terms of variables that obscure causal mechanisms.

How does the simple cultural theory hold up empirically?

- For now, let us, as Art suggests, focus on anti-immigration sentiment as the trigger for "cultural backlash".
- The evidence is **strongest for the theory's between-individual-level and temporal predictions**.
  - Differences between individuals in the repeated cross section: Older individuals tend to hold more nativist views and are indeed more likely to support RWP
    - Note, though, that Schaefer (2022) casts doubt on the empirics Inglehart and Norris use.
  - Temporal: RWP started to emerge / become stronger when immigration is more salient
    - Possible objection: Under what conditions is salience exogenous?
- Weaknesses:
  - **Within-individual/within-country variation over time**: when focus is on personality traits or slowly changing attitudes, one cannot explain why individuals become more/less likely to support RWP (since constants cannot explain change)
  - **Cross-regional variation**: the correlation between immigrant share and RWP is usually negative (Becker and Fetzer 2016), reflecting, for instance, the fact that immigrants sort into more amenable localities
    - What explains regional variation in perceptions of cultural threat then?
    - Type of contact with immigrants (shallow vs. deep), rather than their share (Steinmayr 2021, Lowe 2025)?
    - First derivative: change in immigrant share, rather than level (Ferweda 2019)?

Adding nuance to the simple cultural theory (Margalit et al. 2024)

Table 1: Explanations of Populism Compared across Key Parameters

Storyline	Social process	Cultural concern	Targets of blame	Us vs. Them	Economic vs. Cultural Factors	Observable Implications
Inter-generational Backlash	A slow-evolving shift from materialist to post-materialist values.	The erosion of the moral status of traditional – materialist and conservative – values.	No concrete targets of blame; the liberal elite represents younger generations but is not considered responsible for the intergenerational chasm. Resentment thus directed toward the values shift.	Generational division: older cohorts with authoritarian values vs. younger cohorts with liberal values.	Cultural concern stemming from cultural change; economic forces may have an accelerating role but are not a deep source motivating support for populism.	Older voters with socially conservative values and authoritarian predispositions.
Ethnocultural Estrangement	Profound demographic shifts driven by waves of migration and low birth rates among the native population.	Fears about loss of national identity.	The elite, for facilitating or failing to stop the change in the country's ethnic makeup and subsequent cultural shift.	Ethno-cultural division: native-born versus immigrants and ethnic and religious minority groups.	Cultural concern stemming from changes in ethnic composition; economic forces have an accelerating role but are not the deep cause.	White native voters who feel that their culture is being undermined by mass immigration
Rural Resentment	Processes of urbanization leading to a change in in lifestyles and ethics.	A perception that rural areas do not receive their fair share of public resources and that urban elites look down upon their culture and lifestyle.	Blaming the urban elite, including decision-makers and public employees, who have neglected the concerns and interests of rural residents.	Geographical division: rural residents vs. urbanites and elites, who are concentrated in the large cities.	Rural resentment is a combination of cultural and economic changes that took place over several decades.	Rural residents who feel alienated from decision-making centers and urban elites.
Social Status Anxiety	Gradual disappearance of semi-skilled and secure jobs; Cultural change affecting the public esteem afforded to previously privileged social groups.	Anxiety about a decline – objective or subjective – in social status.	1) Political elites, who prioritize marginalized groups in society; and 2) Social groups that were prioritized and that benefited from this social change.	White workers (especially males) who feel their social standing is diminishing as compared to that of other social groups (females, ethnic minorities, and immigrants).	Combination of cultural and economic changes; economic forces play an important interactive role.	People who perceive themselves as positioned on the lower rungs, but not the lowest, of the social status hierarchy, and seek to maintain a respected position in society.
Community disintegration	Processes of de-industrialization, urbanization, and changes in communal leisure and cultural activities.	Sense of isolation and insecurity resulting from a lack of a cohesive community.	No concrete target of blame for these processes.	No clear distinction between "us" and "them".	Concern stemming from both economic and cultural developments.	People who do not know their neighbors and are saddened by it; they usually do not live in large metropolitan cities.

Some descriptive evidence for different versions of the cultural theory

Figure 2: Share of Voters Whose Characteristics Match Each Storyline, by Vote



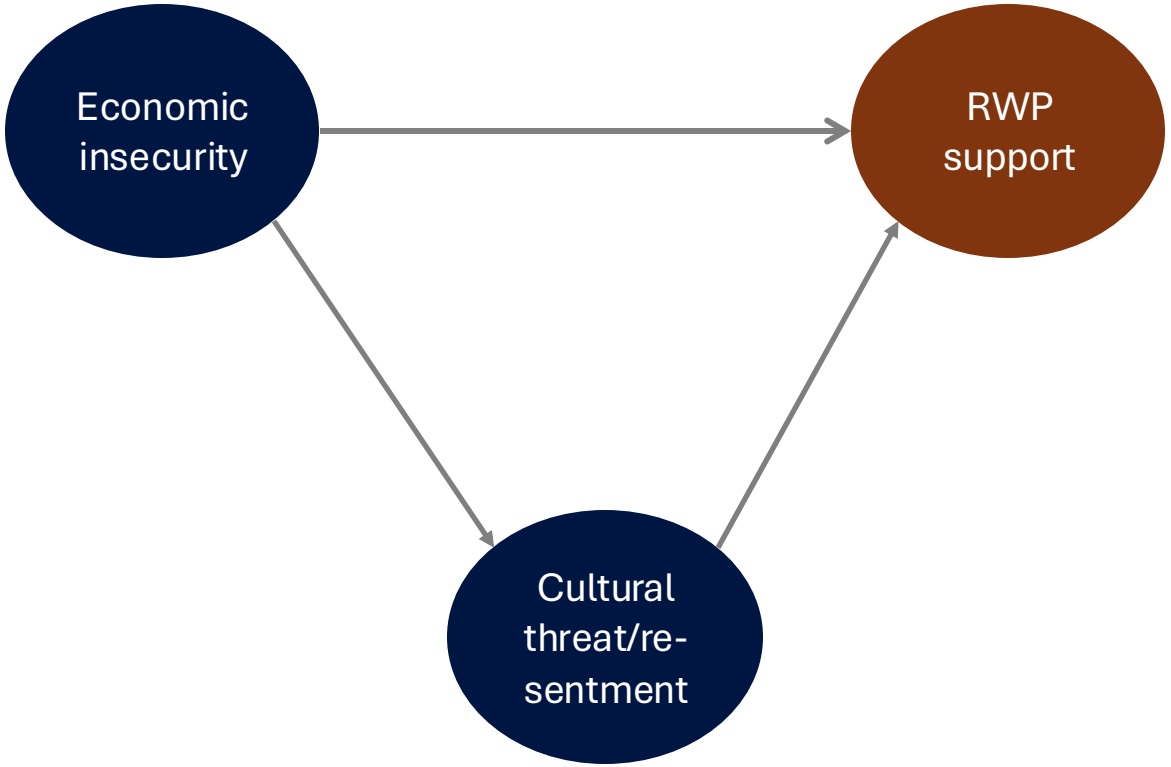
Notes: The figure presents the share of respondents who match the implied characteristics of each of the five cultural stories among voters of right-wing populist parties and voters of other parties, by country. The data are weighted and pooled across ESS rounds 6-9. Due to data limitations, the rural resentment measure relies on data pooled from the last three rounds, while the measures of social status anxiety and community disintegration are based on data from round 6.

Margalit et al. (2024)

Is culture's "win" (Art 2022) just a result of post-treatment bias?

- Let's set aside concerns about the operationalisation and measurement of "cultural" variables.
- It's common in the literature to argue for the primacy of culture by running "horse-race" regressions (Mutz 2018).
  - First, regress RWP support on economic insecurity variable (including socio-dem. controls).
  - Second, show that coefficient on economic variable becomes insignificant once cultural variables included, while latter are significant.
- Only informative if there is no post-treatment bias, if economic insecurity doesn't cause/affect cultural concerns (Morgan 2018, Agnolin et al. 2024)

DAG (directed acyclic graph), where controlling for cultural variables induces post-treatment bias (we control away the indirect effect of economic insecurity)



Summary of cultural explanations

- Strengths
  - Helps understand **generational differences** and **(time-invariant) level differences** in support between individuals that are due to personality differences / deeply ingrained attitudes
  - Substantial predictive power
  - Takes non-material motivations seriously

- Weaknesses
  - Often difficult to robustly operationalise "independent variables"
    - Easy to **under-specify cultural theories**
  - Struggles to explain changes over time – both within countries and individuals – since **explanatory variables are slow moving**
    - Cross-regional variation requires substantial modification of usual theories
  - Relies on strong assumption that cultural attitudes are not mainly caused by economic factors
    - **No post-treatment bias**

Culture vs. economics – never the twain shall meet?

- Is the culture-economics dichotomy a false one? Shouldn't we really be thinking about how they interact?
  - Fair point, though the approaches are quite different. Indeed, they represent different lenses through which to think about politics.

- Models for theorising interaction fall mainly into two groups (Guriev and Papaioannou 2022):
  1. Economics-plus-culture
  2. Culture-plus-economics

1. Economics-plus-culture
   - Economic shocks affect support for populists ***directly*** **via a material channel and *indirectly* by changing non-material ("cultural") attitudes and beliefs**
   - **Cumulative effect of long-term structural changes** explains baseline level of populist support

2. Culture-plus-economics
   - The cumulative effects of **slow-moving, cultural changes (e.g. value change across generations) explain the "baseline level" of populist support**, while economic shocks explain small deviations from that baseline.
   - Economic factors (e.g. income, nature of skills, asset type, etc.) can **moderate effect** of cultural variables on populist support.

For examples see: Baccini and Weymouth (2021), Baccini et al. (2025), Bonomi et al. (2021), Besley and Persson (2021), Gennaoili and Tabellini (2025)

Summarising the culture-vs-economics debate

Primary explanatory variable	Sudden	Gradual
Economic	Economics-cum-culture: the shock version	Economics-cum-culture: the long version
Mechanism	Economic shocks disrupt labour markets → cultural/status threat perception (e.g. via trade, immigration, or deindustrialisation) → support for exclusionary politics (Clark et al. 2025; Baccini and Weymouth 2021)	Persistent low growth & declining mobility → zero-sum economic worldviews → lower trust
Examples	Trade shock → factory closures → anti-immigration sentiment (Autor et al. 2020); financial crisis → distrust & authoritarian preferences.	Secular stagnation → zero-sum attitudes (Chinoy et al. 2025) → declining trust in government (Besley et al. 2025).
Unit of Analysis	**Regional**: exposed labour markets shift rapidly. **Generational**: recession-entry cohorts retain precarity norms.	**Regional**: post-industrial decline → grievance identities. **Generational**: stagnation-socialised cohorts hold durable zero-sum beliefs.
Interpretation	Cultural attitudes are post-treatment of material shocks (Agnolin et al. 2025)	Long-run economic decline gives rise to distrust and (cultural and economic) resentment.
Cultural	Culture-cum-economics: the shock version	Culture-cum-economics: the long version
Mechanism	Cultural threat events activate latent identities → economic policy preferences shift (protectionism, borders, welfare conditionality).	Slow-moving cultural developments (e.g. value change) structure how economic conditions are interpreted and converted into economic preferences.
Examples	9/11 → security-framed restrictions; Netherlands: Pim Fortuyn surge after 9/11 reframes Islam as threat → anti-immigration, EU scepticism.	Ethno-cultural estrangement, rural resentment, status hierarchies, etc. (Margalit et al. 2025) shape attitudes to trade, redistribution, welfare deservingness. Identity moderates responses to economic shocks (Margalit 2019, Bonomi et al. 2021).
Unit of Analysis	**Regional**: culturally cohesive communities shift economic preferences sharply under threat. **Generational**: cohorts socialised amid cultural conflict retain defensive attitudes.	**Regional**: historically homogeneous/frontier regions maintain exclusionary baselines. **Generational**: family, religion, schooling reproduce economic-relevant values.
Interpretation	Shocks alter salience & economic attitudes; cultural attitudes remain largely unchanged	Slow-moving cultural variables explain baseline support for support; economic shocks explain deviations from baseline (Margalit 2019).

A quirky, intermediate summary of the demand-side literature

- Ultimately, many demand-side explanations for populism can be thought of as elaborate ways to examine how support for populists arises for:

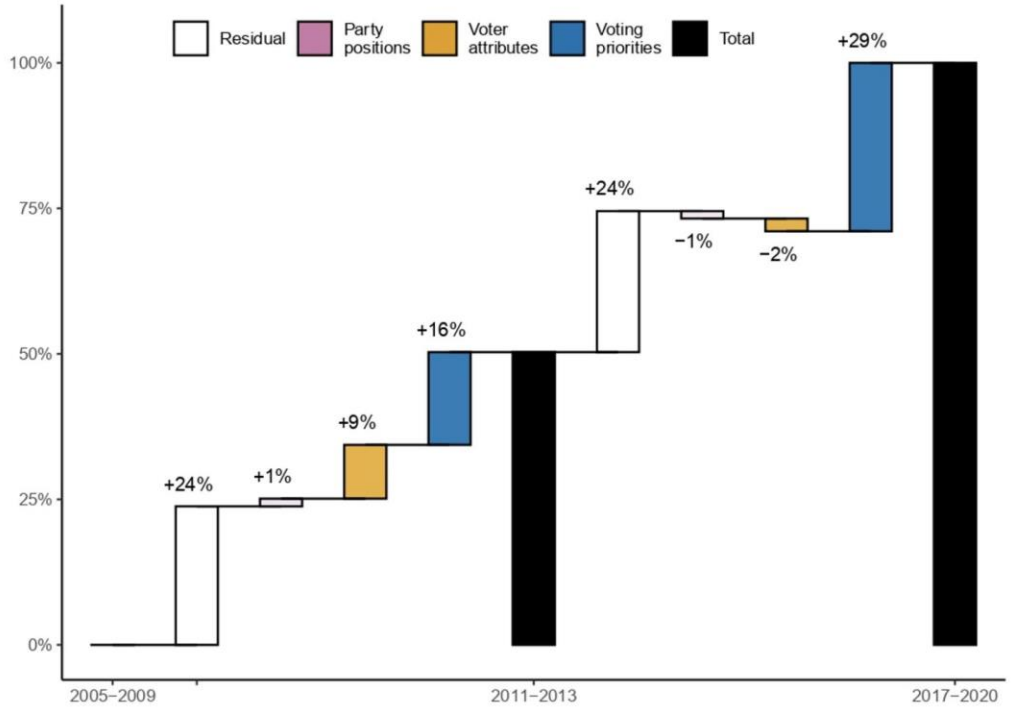
1. **Spatial reasons**
    - ***Primary focus of literature***: Voters change their bliss points as a result of being (in)directly affected by adverse economic shocks, or because of cultural changes.
    - Parties change their position.
2. **Salience-related reasons**
    - Issues become more salient over time on which right-wing populists are spatially closer to voters than on issues that were salient before. No change in attitudes has to take place.
3. **Valence-related reasons**
    - Voting behaviour might have changed by virtue of voters believing the competence of mainstream politicians to be lower, or placing lower trust in their policy promises.

- **My take-away on the demand-side literature**: *It's a very important strand of the literature and important to be familiar with the arguments, but there is a greater need to consider salience- and valence-related reasons*.

Towards a less narrow-minded understanding of the demand side of populism

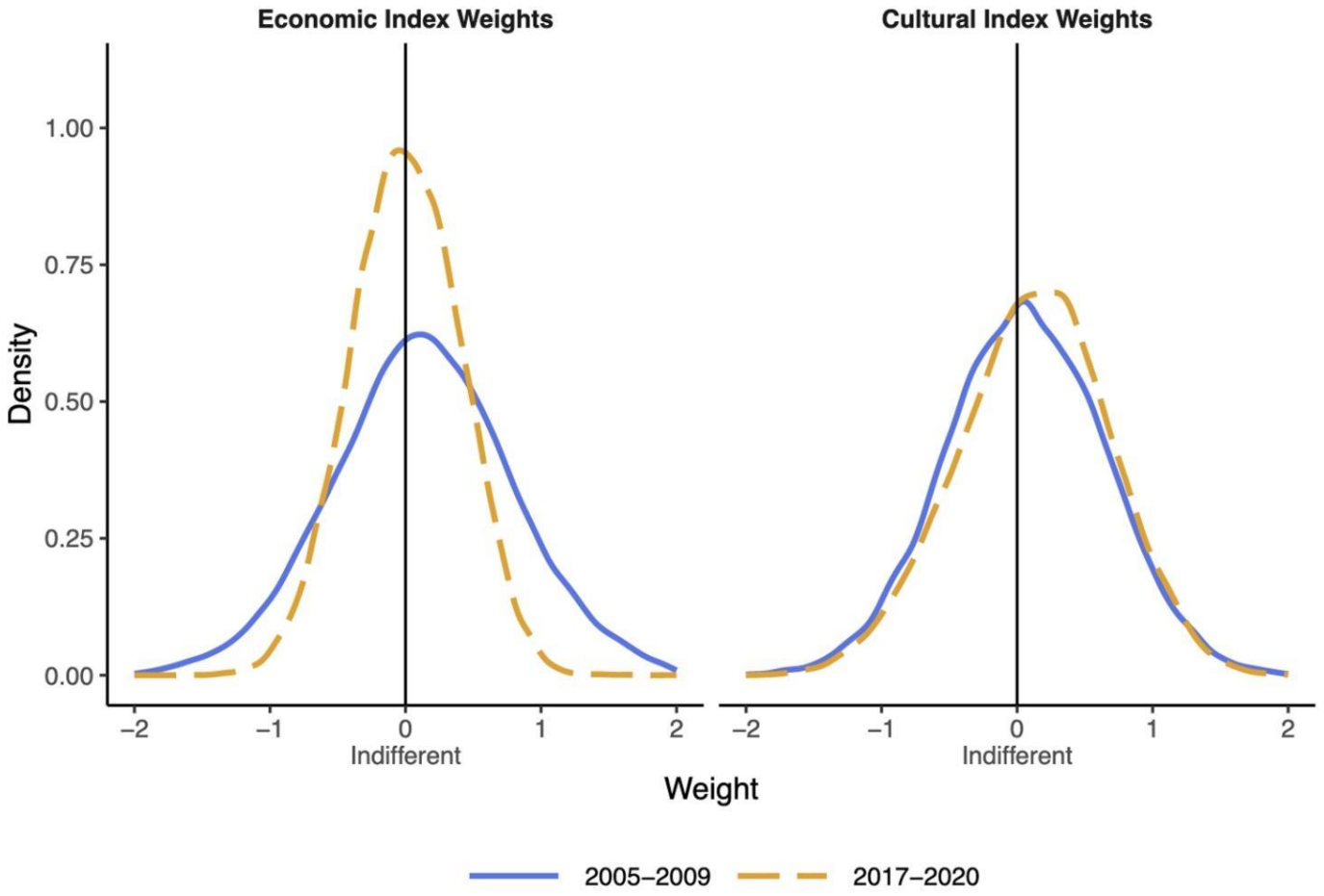
Danieli et al. (2023)

- **Method**: Estimate a multi-dimensional probabilistic voting model
- **Data:** Comparative Manifesto Project (for party positions) and Integrated Values Survey for voters' positions / priorities (22 European countries, 2005 to 2020)
- **Results**
  - **Spatial arguments are relevant** (see yellow/orange bars), but they leave a great deal of the observed variation unexplained
    - Especially in the late 2000s and 2010s, variation in populist success **does *not* seem to have been driven by changes in party positions, voters' bliss points** (voter attributed).
  - Instead, residual (includes **valence** and other, unobserved characteristics) variation and **changes in voting priorities** (issue importance / salience) seem to be the biggest drivers.
- **Note of caution**: One paper, however ingenious and important, does *not* constitute a body of evidence.
  - The decomposition exercise requires a number of assumptions to hold, which are contestable (and will likely be contested).



Danieli et al. (2023)

The importance of changing salience for the emergence of populism (Danieli et al. 2023)



What drives changes in salience? Is salience exogenous or endogenous?

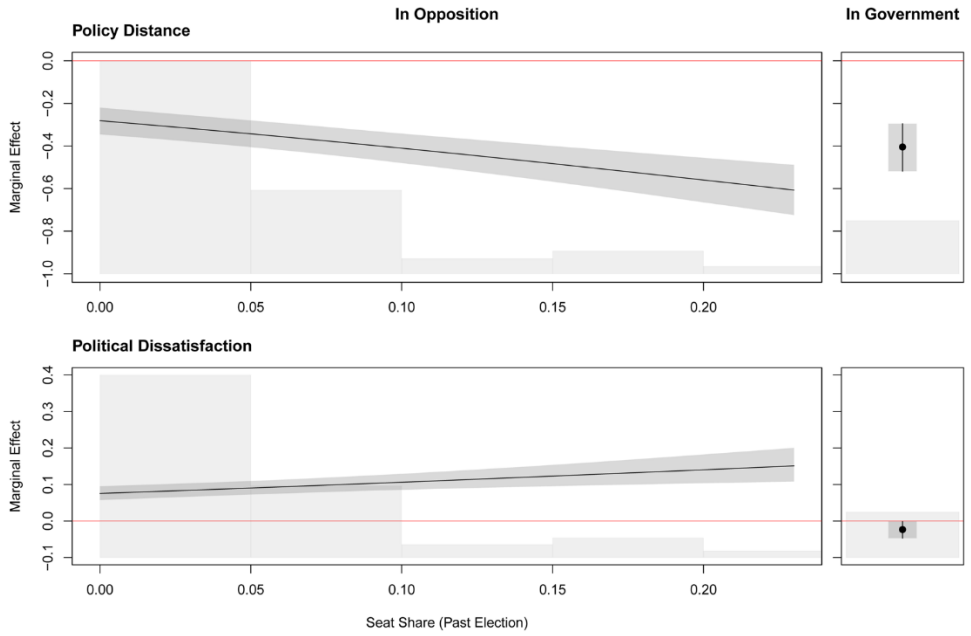
- If salience is, indeed, one of the main culprits it is important to think more carefully about what drives changes in voters' priorities. There are fundamentally two strands:

1. Exogenous
    - Focusing events drive salience
    - Longer-term structural changes that are largely exogenous to parties' actions drive salience (Bech Seeberg and Adams 2024)
    - Critical junctures (Collier and Munck 2022)
        - Example: End of Cold War (Trubowitz and Burgoon 2023)
2. Endogenous
    - Voters' issue priorities are the result of actions by political actors, or the media
    - Will revisit this in the section on supply-side explanations

The importance of valence (Cohen 2020, Morelli et al. 2021)

- Theoretical argument:
  - RWP combine distinctive **policy platform (usually restrictive immigration policy) with anti-establishment stance**
    - Appeals to voters who want (more) restrictive immigration policy *and* those with low trust in the establishment
  - Key dimension of valence: **RWP's legislative strength**
    - The more seats RWP have, the more credible are RWP policy appeals (ability to influence policy)
    - Can retain anti-establishment posture as long as they are in opposition
- Empirics:
  - European Election Study, 1989 to 2014
  - Estimation via Bayesian hierarchical models
- Morelli et al. draw on agency theory to articulate another valence-based rationale for RWP's success

Average marginal effects by RWP seat share



Cohen (2020)

II Supply-side explanations

A quick introduction to the supply-side literature

Actors and institutions

- Politicians and parties
- Party activists
- Bureaucrats
- Experts
- Judges
- Media
- Electoral systems
- International/supra-national institutions (e.g. central banks)

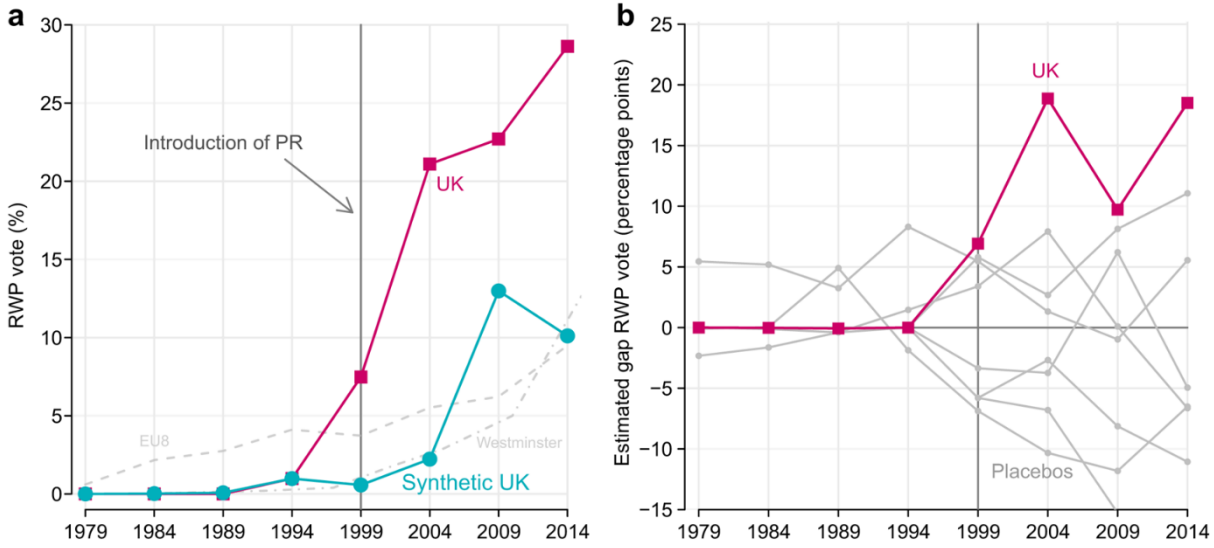
Some of the desiderata

- Why has party entry/exist increased?
- Why have parties become more decentralised?
- What explains why legislators tend to be more liberal than voters on cultural issues? Incentives? Selection?

→ *There is less work on supply side than demand side*

The role of electoral systems (Lee 2020, Becher et al. 2023, Gonzalez-Rostani 2024)

- Argument:
  - **PR systems** make it easier for new parties to enter the market and perform well electorally than **majoritarian system**s.
  - In **PR systems**, we thus get populism at the level of the party system, whereas in **majoritarian systems** we typically see one (or both) of the two big parties morphing into a populist one (e.g. GOP in US).
- Empirics:
  - Becher et al. (2023) test the first part of this argument by examining how the adoption of PR for European Elections in the UK in 1999 affected the vote share of UK radical right parties (e.g. UKIP).
  - **Estimation:** Generalised DiD and synthetic control
  - **Results:** Reform boosted RWP vote share by 12 to 13.5 percentage points on average



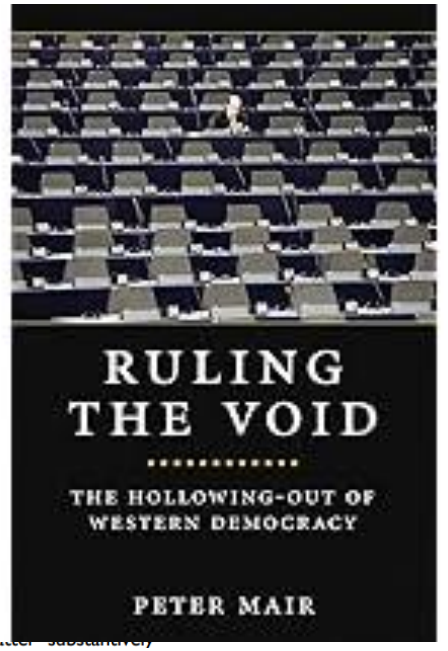
Becher et al. (2023)

The nature of parties as an explanation for demand-side dissatisfaction?

There are competing hypotheses about the role that the changing nature of parties has played:

1. **Cartel of mainstream parties** with decreasing linkages to population (Katz and Mair 2009, Mair 2013) explains representation gaps and elite-biased policymaking.
2. The increasing **prevalence of careerist politicians**, combined with the declining presence of working-class legislators, helps explain the representation gaps.
3. The **decentralisation of parties**, especially over leadership selection, has granted disproportionate power to party members/activists with relatively extreme views.
4. The **decline of "intermediary organisations"** – notably union and churches – has made it much harder for mainstream parties to maintain increasingly diverse electoral coalitions (Mueller 2021, Kuo 2025).

→ Decline of core voters / voter loyalty has reduced room for long-term policymaking (Dixit and Londregan 1998); instead, more "symbolic" and myopic policymaking



Careerists Versus Coal-Miners: Welfare Reforms and the Substantive Representation of Social Groups in the British Labour Party

Tom O'Grady[1]

Abstract

Many parties have seen declines in working-cla
professional career politicians. I argue that caree
adopt policies for strategic political reasons, wh
are more likely to represent the interests of v
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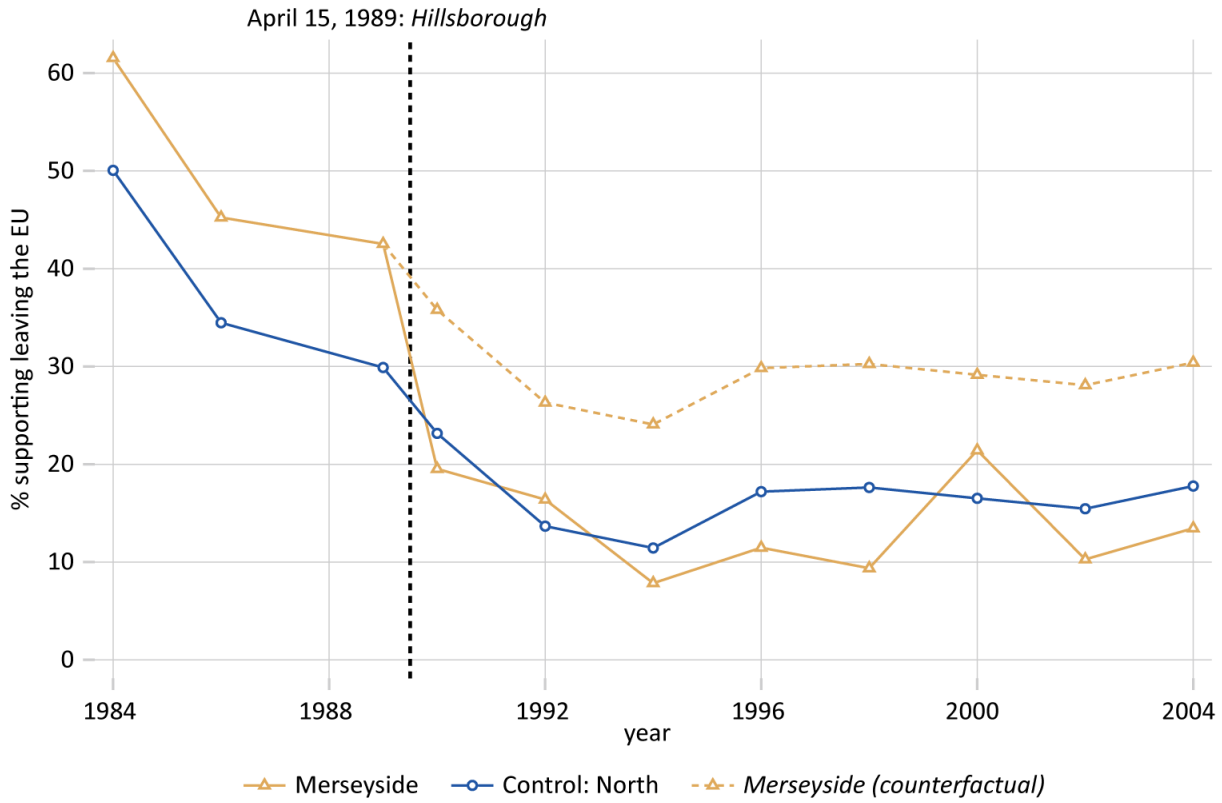
A Downsian Spatial Model with Party Activism

JOHN H. ALDRICH
University of Minnesota

A unidimensional spatial model is proposed in this article. Although its formal structure parallels the spatial model of electoral competition, this model examines the decisions of individuals as they choose whether or not to become activists in one of two political parties. An individual "calculus of participation" is developed that is similar to the spatial interpretation of the "calculus of voting." This calculus is then generalized by examining conditions that may hold for aggregate activism probabilities, and the relationship between the two forms is investigated. Some results are then presented which concern the distributions of activists in the two parties. These results in general conform to the existence of "party cleavages," in which there are two stable (equilibrium) distributions of activists, such that the two parties' activists are relatively cohesive internally and relatively distinctive externally. Finally, some suggestions are offered about how this model can be combined with the spatial model of candidate competition to provide a more complete model of elections.

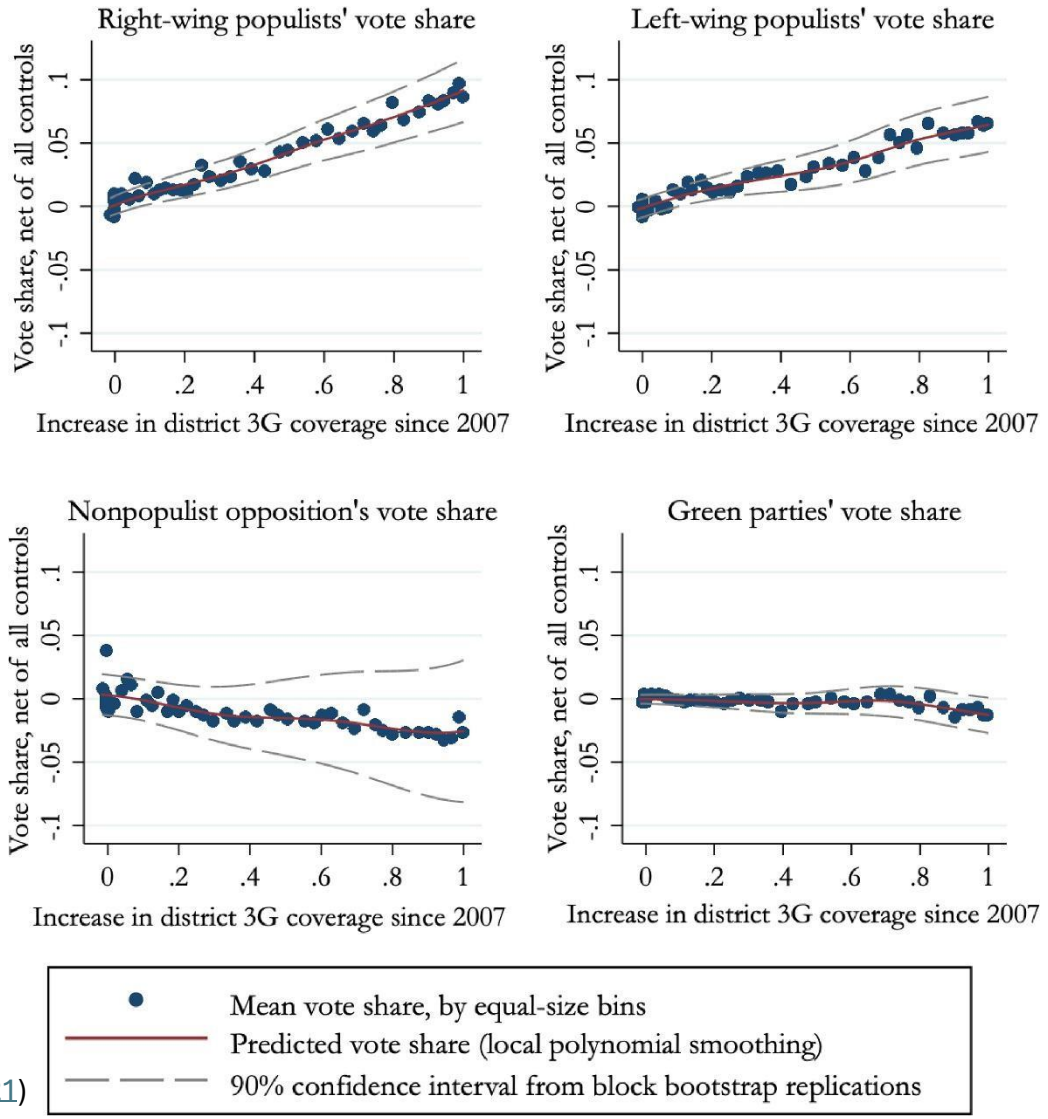
The role of (social) media (Foos and Bischof 2022)

- Prominent argument:
  - Pro-populist coverage by tabloids and TV channels (e.g. Fox news, see Ash et al. 2024) helped **peddle populist narratives, thereby inducing attitudinal change** and/or misperceptions and ultimately boosting RWP vote share
  - Decline of local newspapers (Ellger et al. 2024)
- Ingenious empirical test comes from the Merseyside boycott of the *Sun*
  - Boycott result of Sun's coverage of Hillsborough football disaster in 1989
  - Allows for DiD design
  - Key results: **Attitudes become less Eurosceptic and lower leave vote share in 2016**



The role of (social) media (cont'd)

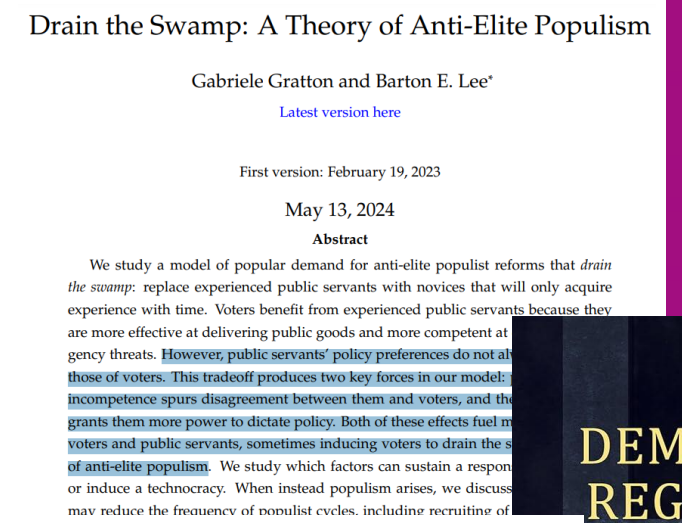
- Social media is a much-discussed, but poorly theorised, factor, with some notable exceptions (Guriev et al. 2021).
- Usually, seen as a demand-side factor and the results by Guriev et al. and other suggest there is a lot to this, but it also has supply-side implications:
  - Social media reduces the **gatekeeping power of traditional media**
  - In doing so, it lowers **the barriers to entry** for populist challengers.
  - Potentially, helps explain why entry of new parties has become more common
- Results on right are based on parliamentary elections between 2007 and 2018 in 33 European countries (EU-28 plus the usual suspects) at NUTS2 level. Staggered DiD / event study framework



Guriev et al. (2021)

Is technocracy to blame for the rise of populism?

- Technocracy can come in different forms:
  1. Delegating extensive judicial review powers to courts and judges
  2. Granting bureaucrats the power to craft policies
  3. Involving other experts, such as academics, in the policymaking process
- **Technocrats have their own biases** (e.g. more culturally liberal than most voters, often economically more conservative), which can be especially problematic because voters cannot hold them accountable directly.
- **The more power technocrats have, the less elections seem to matter.** How, if at all, does this influence voting behaviour / attitudes?



Drain the Swamp: A Theory of Anti-Elite Populism

Gabriele Gratton and Barton E. Lee*

Latest version here

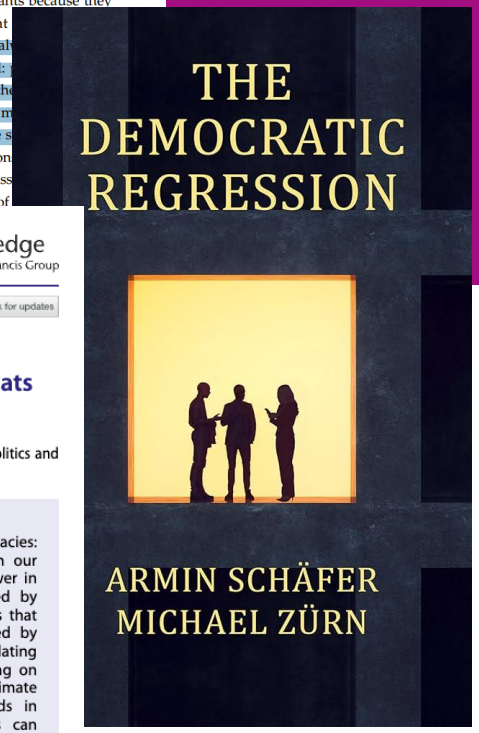
First version: February 19, 2023

May 13, 2024

Abstract

We study a model of popular demand for anti-elite populist reforms that *drain the swamp*: replace experienced public servants with novices that will only acquire experience with time. Voters benefit from experienced public servants because they are more effective at delivering public goods and more competent at gency threats. However, public servants' policy preferences do not al those of voters. This tradeoff produces two key forces in our model: incompetence spurs disagreement between them and voters, and th grants them more power to dictate policy. Both of these effects fuel m voters and public servants, sometimes inducing voters to drain the s of anti-elite populism. We study which factors can sustain a respon or induce a technocracy. When instead populism arises, we discuss may reduce the frequency of populist cycles, including recruiting of





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The rise and fall of technocratic democracies: unstable majorities and delegation to technocrats

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[a]UNSW Business School, UNSW Sydney, Sydney, NSW, Australia; [b]Department of Politics and International Relations, University of Oxford, Oxford, United Kingdom

ABSTRACT
We study a stylised model of the rise and fall of technocratic democracies: democracies that delegate policymaking to unelected technocrats. In our model, technocratic democracies arise when majorities fear losing power in the future while expecting their preferred policies to be maintained by technocrats. Such institutional arrangements can be stable, but shocks that increase the persistence of majorities or of the policies implemented by technocrats can plunge democracies into cycles of reforms, oscillating between more technocratic and more majoritarian institutions. Drawing on three case studies – central bank independence, fiscal rules, and climate policy – we illustrate how our model helps explain recent trends in industrialised democracies and how technocratic-majoritarian cycles can heighten the risk of democratic backsliding.

ARTICLE HISTORY Received 15 April 2025; Accepted 13 October 2025

Agenda

1. The rise of right-wing populism (RWP): Definitions and stylised facts
2. Explanations for the emergence of RWP forces
3. The consequences of RWP
4. What if, anything, can we do about countering RWP?

I. Policies

What types of policies do (right-wing) populists implement?

Donald Trump promotes tariffs as his favourite theme in interview, says 'It's the most beautiful word in dictionary'

In a Chicago interview, Trump promoted tariffs as beneficial for the economy, claiming they would generate revenue and protect US businesses, while clashing with the moderator over their negative implications for consumers

Lessons from the Biggest Business Tax Cut in US

Gabriel Chodorow-Reich
Owen Zidar
Eric Zwick

JOURNAL OF ECONOMIC PERSPECTIVES
VOL. 38, NO. 3, SUMMER 2024
(pp. 61–88)

Hungary to offer EU's lowest corporate tax rate

Viktor Orban seeks to lure foreign direct investment with 9% rate



POLITICO

Finance & Tax | Morning Money newsletter | Friday edition: Capital Risk

Trump announces 25% tariffs on foreign steel and aluminum

Modified US duties will be enforced 'without exceptions', said president, in controversial bid to boost economy

- What are the tariffs on steel and aluminum Trump announced?
- Why Trump tariffs will be 'very bad for America and for the world'



Rolls of steel are seen at a steel market in Fuyang, in China's eastern Anhui province on Monday. Photograph: AFP/Getty Images

'I'd love to fire his ass': Trump fumes at Powell as Fed splits over rates

The president is under fire from Democrats for what they say is his failure to bring down prices, and polls show voters lack confidence in his economic leadership.



Federal Reserve Board Chair Jerome Powell departs at the end of a news conference following a Federal Open Market Committee meeting at the Federal Reserve in Washington, May 7, 2025. | Brendan Smialowski/AFP via Getty Images

Hungarian Central Bank Independence at Risk, Governor Warns

- Government seeks to increase the central bank's oversight
- Orban, Governor Matolcsy have been at loggerheads over po



Populists are economic isolationists

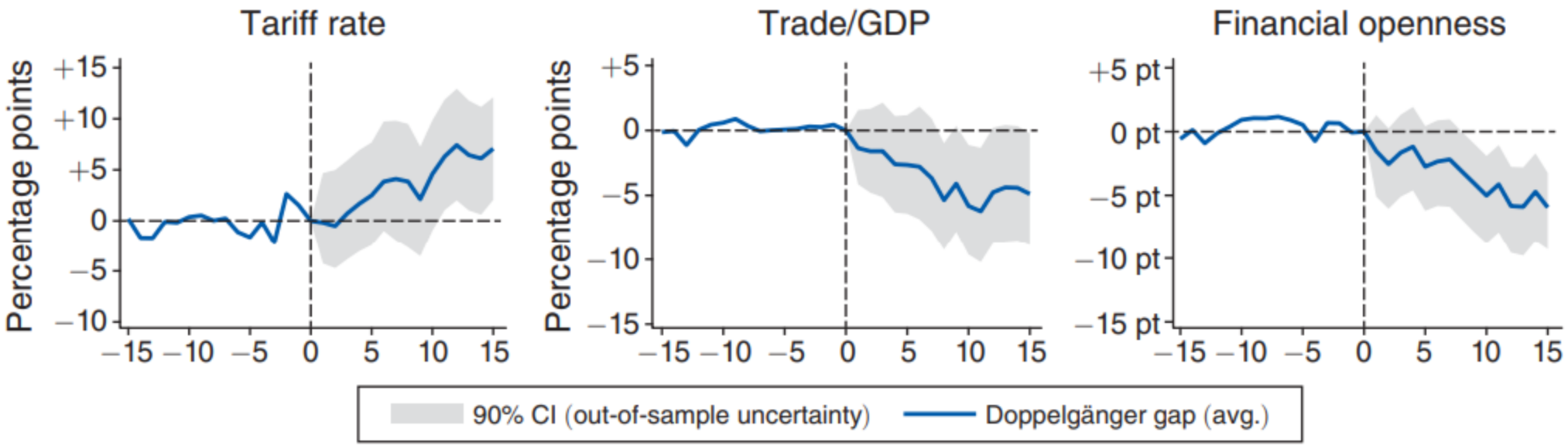


FIGURE 12. TRADE AND FINANCIAL OPENNESS AFTER POPULISTS TAKE POWER (+/− 15 YEARS)

Funke et al. (2023)

Do these policies "work"? Not in welfaristic terms

There are at least **two ways in which policies one can think of policies "working":**

1. **Welfare economic** / welfarist conception
   - Policies can improve the (non)-material well-being of people.
2. **Political economy conception**
   - Policies help politicians increase their prospects of political survival – staying in power for longer.

Take-aways from literature:

1. Populist policymaking **does not, on average, improve welfare**; indeed, the reverse is true for many relevant dimensions.
2. There is **considerable variation** in the political economy effects of populist policies (e.g. Orbán vs Trump).

Synthetic control estimates of populists' effect on real GDP p.c. for 60 countries

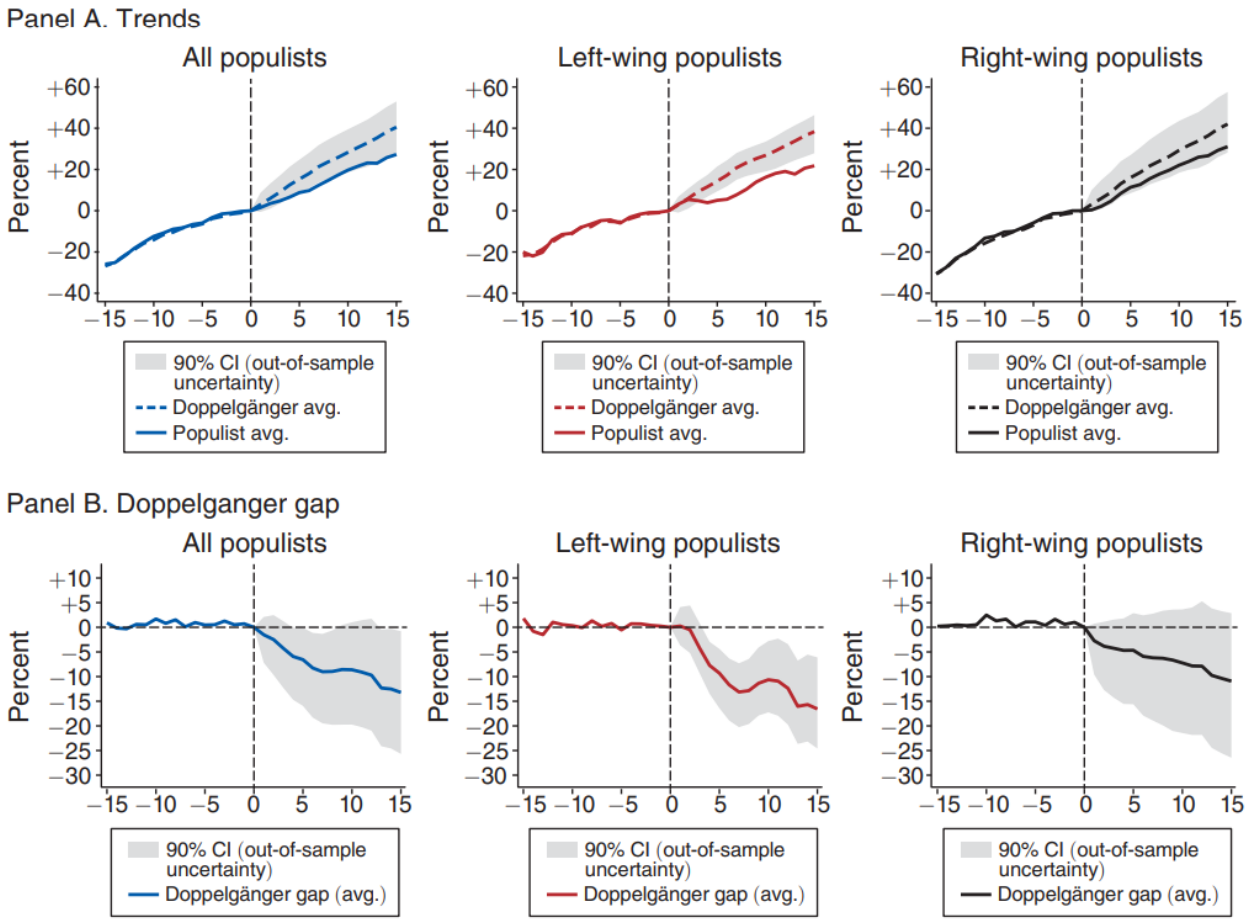


FIGURE 6. BASELINE RESULTS

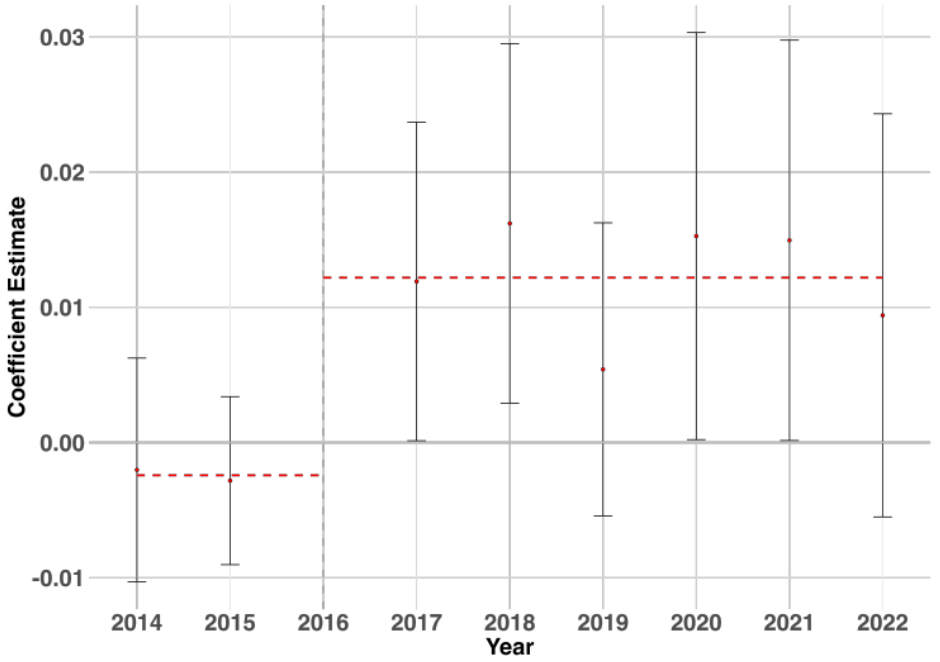
Funke et al. (2023)

Do populist policies work in political economy terms?

- Two insight from literature:

1. "Bad" policies – those with regressive distributional effects and those that lower investment and growth – are ***not* bound to undermine support for populists**.
   - In fact, sometimes populists might even gain support among the losers of these policies
   - Populists might be able to forge "unholy coalitions" (Hacker and Pierson 2020, Fetzer et al. 2024) between the very rich and those that have long lost out in (relative terms, see also Burgoon et al. 2019).
2. **But most populists are not strategic geniuses** either – and get punished for implementing policies with detrimental effects.
   - Trump lost 2018 mid-terms in part because losers of his trade war with China punished him electorally (Fetzer and Schwarz 2021, Kim and Margalit 2021, Mansfield and Solodoch 2024, Li et al. 2024)

Figure 8: Increases in right-wing party support among British Election Study respondents in areas negatively economically impacted by Brexit



Note: The Figure presents results from a regression analysis, documenting that right-wing party support among BES survey respondents is notably higher in areas that are negatively economically impacted by Brexit. To measure Brexit cost, we use the preferred binary coding that classifies areas as Brexit-vote losers if their synthetic control estimate is below the actual recorded measure in each of the years after 2016. Appendix Figure A9 presents similar results using the continuous measure of the Brexit cost estimate. Appendix Table 9 presents pooled results showing that results are robust to alternative Loser definitions. Appendix Figure A10 highlights that the results are driven by areas that experience the highest Brexit cost. We use the best synthetic control that has been identified using the RMSPE selection criterion. Right-wing parties considered are the UK Independence Party (UKIP), British National Party (BNP), Reform UK and the Brexit Party respectively. Regressions are estimated using two-way fixed effects models controlling for individual-level fixed effects as well as time fixed effects. The estimating sample focuses on the set of individuals who lived in a district in each wave when they were surveyed, with at least one observation before and after 2016. Standard errors clustered at district level.

Alabrese et al. (2024)

II. Institutions:

Loosening constraints on executive power, eroding minority rights, hollowing out the “deep state”

Attacks on the independence of the judiciary and the media – as well as free elections

Synthetic control estimates of populists' effect on V-Dem indicators

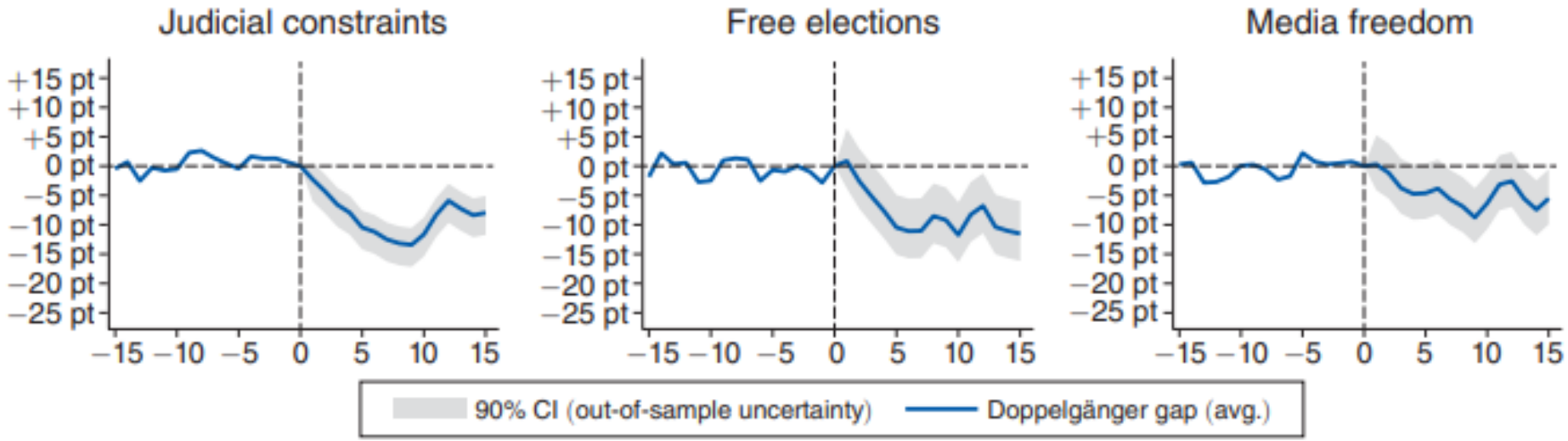
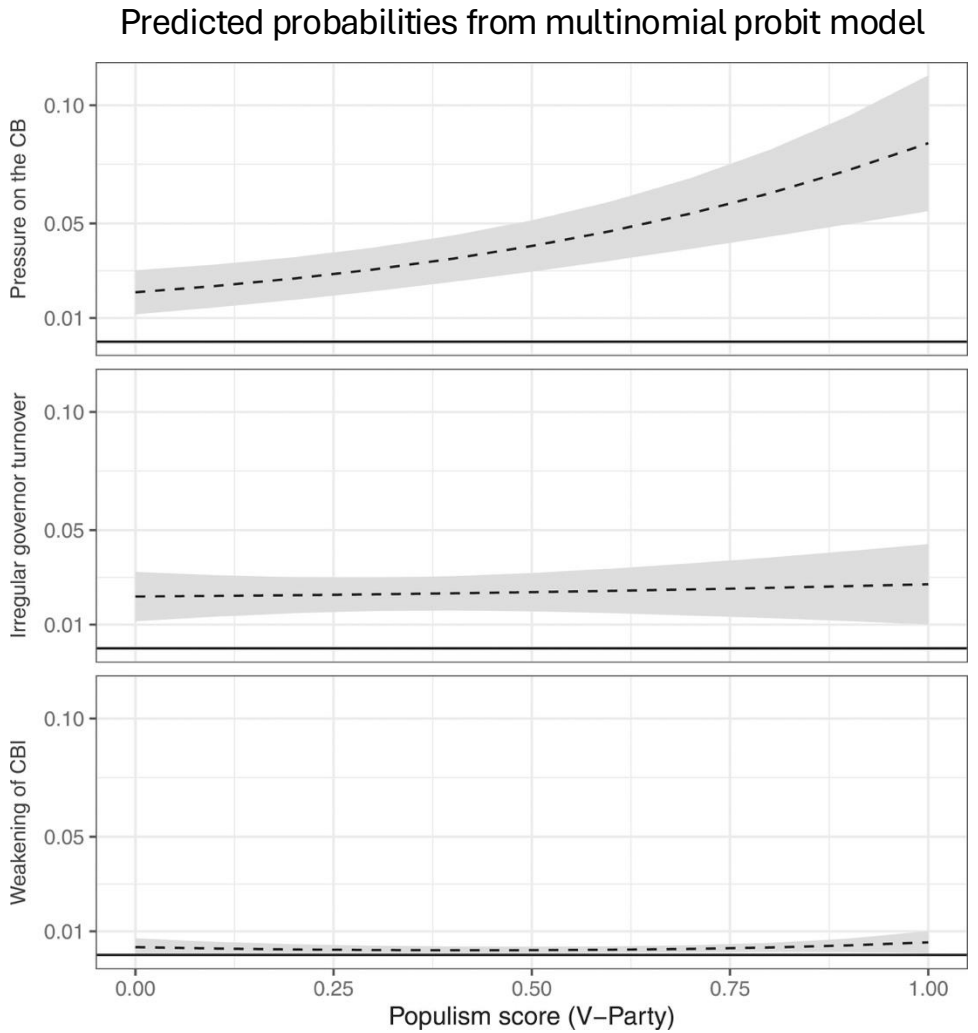


FIGURE 14. INSTITUTIONS (DOPPELGÄNGER GAP) AFTER POPULISTS TAKE POWER (+/− 15 YEARS)

Funke et al. (2023)

Attacks on central bank independence

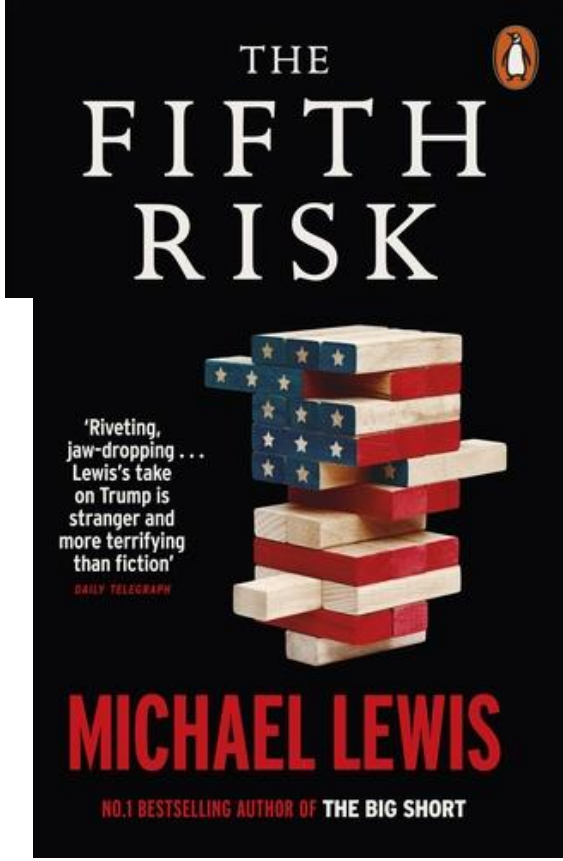
- Common for populists to attack the independence of central banks.
- Gavin and Manger (2023) present an interesting (theoretical and empirical) analysis.
  - Multinomial outcome (no pressure as reference category, weakening of independence, irregular turnover of CB governor, public pressure)
  - Public pressure measured by analysing monthly reports of *Economist Intelligence Unit* via supervised machine learning
    - 1996 – 2016 for ~180 countries (though results driven mainly by emerging markets)
  - **Analysis shows that populist governments are more likely to put public pressure on CBs**
    - Top panel shows that right-wing populists are more likely to publicly put pressure on Central Banks than left-wing ones



Gavin and Manger (2023)

Erosion of bureaucratic capacity (Bellodi et al. 2024)

- Italian municipalities (~8,000), 1998 to 2020
- Plurality-rule mayoral elections allow for close-election regression discontinuity design (if continuity of potential outcomes around cut-off is a plausible assumption)
    - For methodological considerations, see this excellent paper by Marshall (2024).
- **Key results**: Municipalities where populist mayoral candidates just win, compared to those where they just lose, indicates that populist mayors increase bureaucratic turnover, especially among post-graduates.

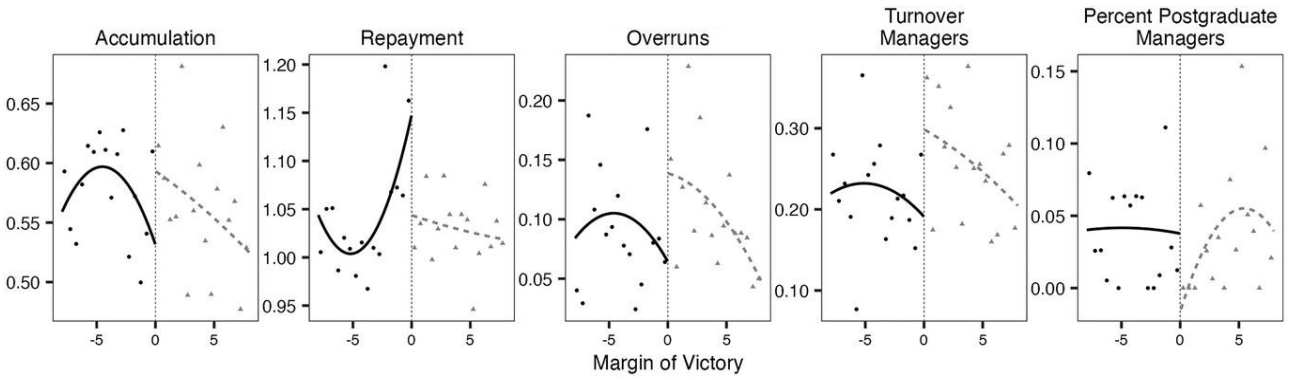


The Persistence and Fragility of Bureaucratic Capacity*

Lindsey Gailmard† Sean Gailmard‡

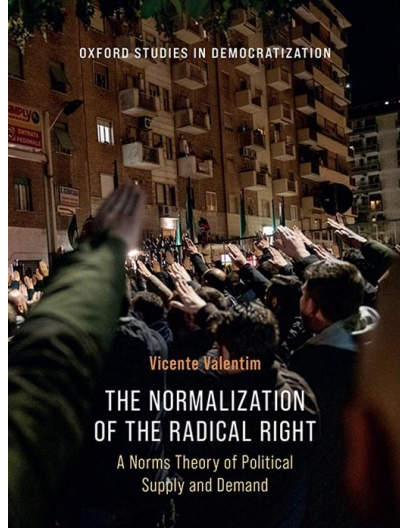
June 9, 2025

Political manipulation of bureaucratic agencies can undermine their capacity. Yet the dynamic effects of political management on bureaucratic capacity are not well understood. To address this question we develop a formal model of bureaucratic capacity as a team production process, with self-selection into bureaucracy by overlapping generations of agents. The model reveals four fundamental insights. First, high capacity requires shared expectations by skilled agents that other skilled agents will pursue bureaucratic careers. Second, capacity can be fragile: transitory political manipulation can change selection into an agency and, in turn, degrade its long-term capacity. Third, high-capacity bureaucracies are especially vulnerable to long-term undermining through short-term political manipulation, whereas medium-capacity bureaucracies are more resistant. Fourth, effects of short-term political manipulation can be mitigated by increasing transferability of skills between agencies and other career options, though this will typically increase "revolving door" career paths.



III. Attitudes, salience, and norm erosion

The dynamics of normalisation of the radical right (Valentim 2024)



Motivating fact: Once RWP have broken through, their support tends grow fast (see figure on the right).

Question: Can this be explained by sudden attitudinal change? Unlikely – we have seen above that attitudes tend to change relatively slowly and, rarely, do they change (so) drastically.

Theoretical argument:

- Shift focus from attitudinal change to differences between *private* and *public* preferences (following Kuran 1995) and how wedges can arise/fade owing to changes in the **stigmatisation** of certain attitudes
- Assumptions:
  - Before breakthrough of RWP, radical-right attitudes, such as xenophobia, are **publicly stigmatised**
    - Consequence: Those whose private attitudes align with RWP are not willing to express these attitudes publicly – don't want to incur stigma
  - High-skilled politicians are much less likely than low-skilled ones to run for strongly stigmatised parties

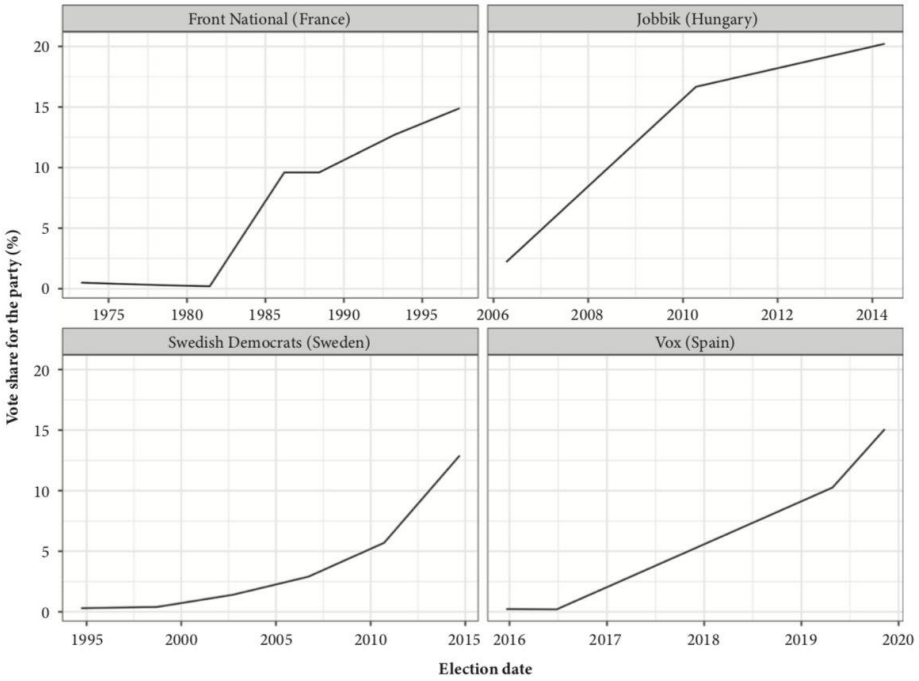
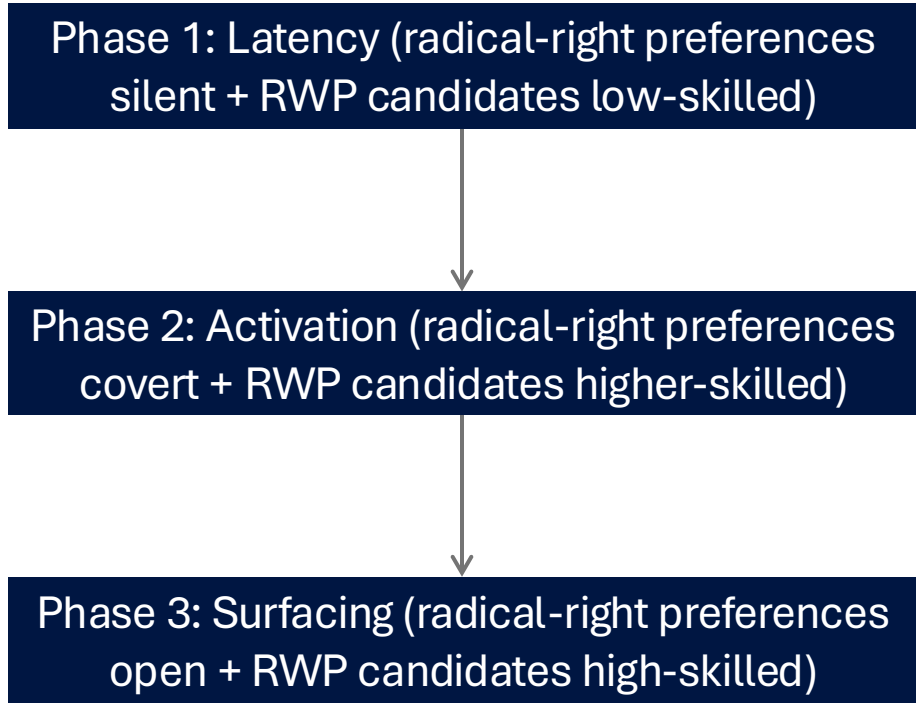


Figure 1.1 Evolution of vote shares for selected radical-right parties in their first few elections

Valentim's (2024) theoretical argument

- During **latency phase,** there are many **silent supporters** of the radical right – those whose views align, to a significant extent with RWP, but who do not want to express them publicly (e.g. in voting decisions) for fear of being stigmatised.
- During the **activation phase**, radical-right's electoral success – often driven by charismatic (and more highly skilled) leader and favourable salience shocks (e.g. worries about immigrations) – leads to a growing number of previously silent supporters inferring that many people (more than they thought) share their views.
    - This increases their willingness to support RWP at the polls, though the remaining stigma means that the preferences are covert – they shape voting behaviour, but are not expressed publicly.
- During the **surfacing phase**, the continued success of RWP means that supporters become more willing to express their preferences publicly, bring their private and public preferences into alignment.

→ **Sudden changes in RWP support** without sudden and rapid attitudinal changes



Adapted version of figure 1.3 in Valentim (2024)

Normalisation in the lab and the wild

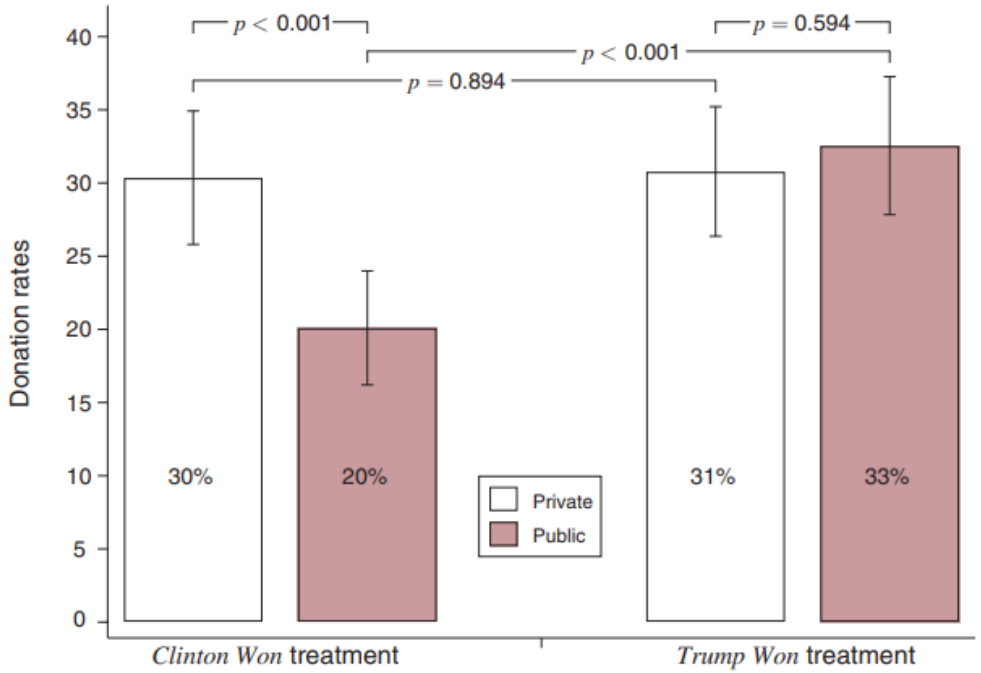
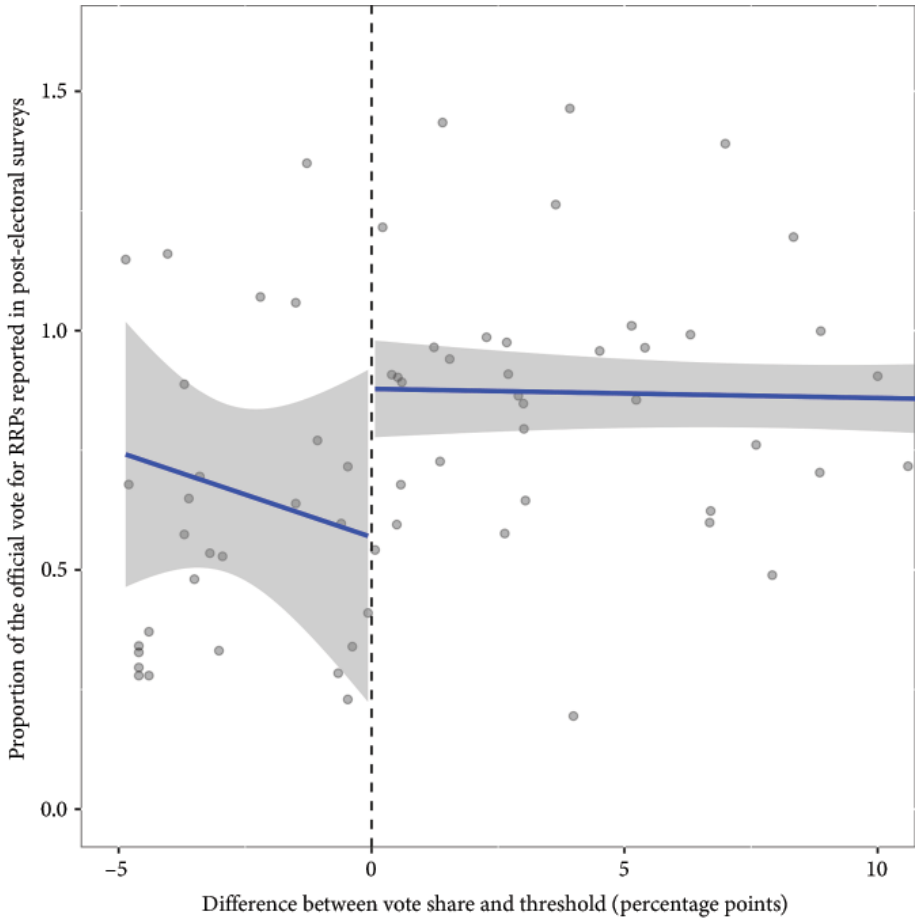


FIGURE 1. EXPERIMENT 1: DONATION RATES

Notes: The two bars on the left display donation rates to the anti-immigration organization for individuals in the private and public conditions in the *Clinton Won* treatment group (respectively $N = 392$ and $N = 408$), and the two bars on the right display those for individuals in the private and public conditions in the *Trump Won* treatment group (respectively $N = 419$ and $N = 381$). Error bars reflect 95 percent confidence intervals. Top horizontal bars show p-values for t-tests of equality of means between different experimental conditions.

Bursztyn et al. (2020)

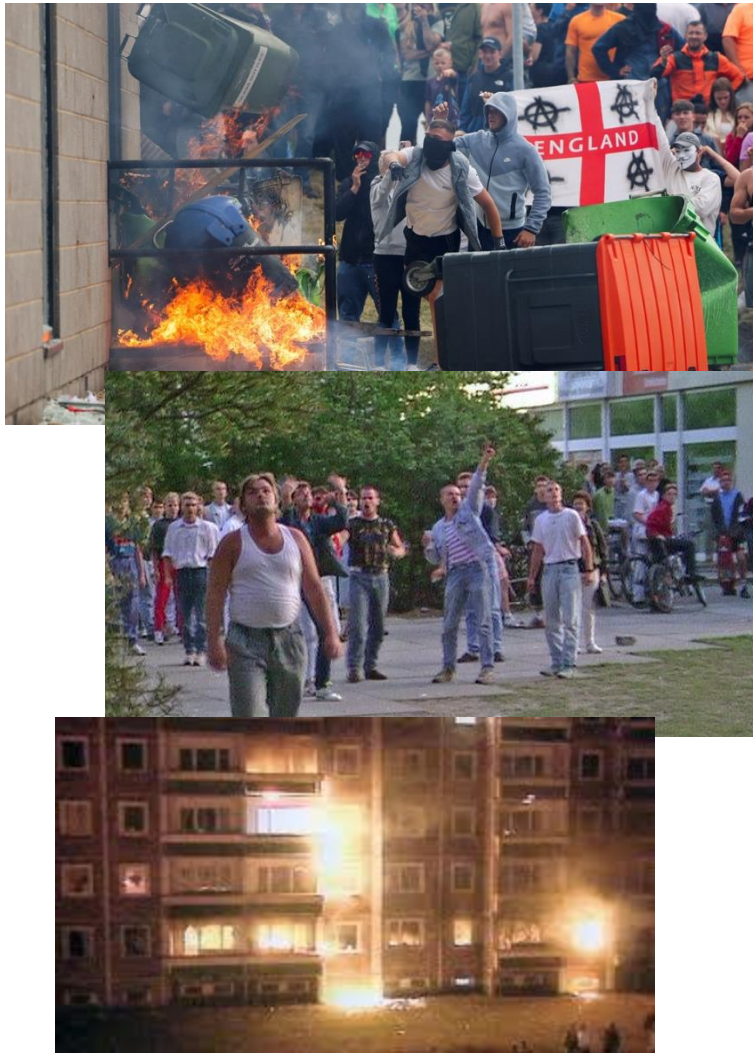
Fuzzy RDD around election threshold



Valentim (2024, figure 7.2); see also Valentim (2021)

The non-electoral consequences of normalisation: Hate crimes

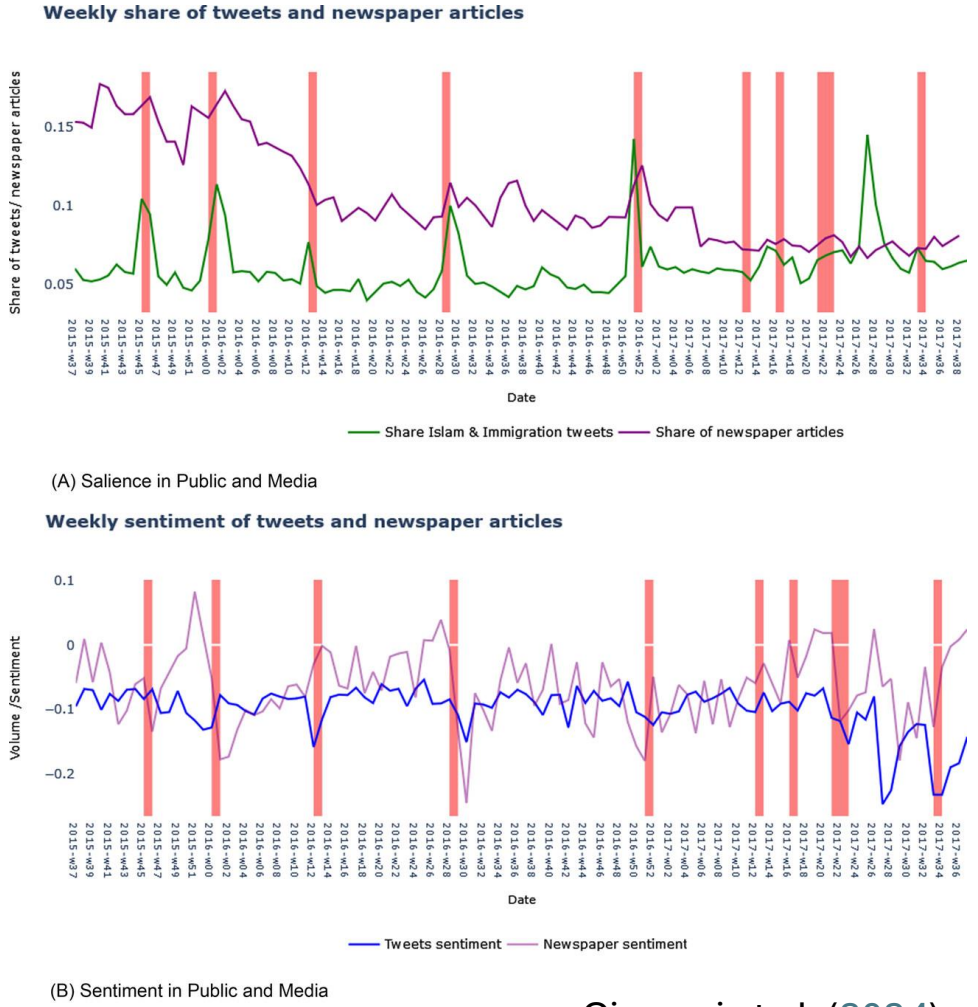
- The normalisation of the radical right can also engender non-electoral consequences, notably **riots and hate crimes** (e.g. UK in summer 2024). These ramifications are documented in a growing body of work based on both observational and experimental data.
  - Romarri (2020)
    - Close-election RDD for Italian mayoral elections (identification strategy similar to Bellodi et al. 2024) → probability of hate crimes increases by around 5 percentage points in municipalities where radical right candidates just win
  - Mueller and Schwarz (2021, 2023)
    - 2021: internet outages used to isolate exogenous variation in exposure to anti-refugee Facebook posts → crimes against refugees become more likely in Germany; 2023 paper on US context
  - Dancygier (2023)
    - Between 40% to 50% of AfD voters approve of hate crimes against refugees (elicited via list experiment)
  - Riaz et al. (2024)
    - RDD in time in Germany, with treatment being crime events that involve immigrants → probability of hate crimes increases by 1-2 percentage points in the two days after the event



The non-electoral consequences of normalisation: shifts in salience favourable to radical right

- **(Muslim) terrorist attacks and crimes** involving immigrants not only provide fertile ground for radical-right politicians to **"justify" their previously stigmatised positions**, but also to get mainstream politicians to embrace some/many of their policies.
- The result is often normalisation, which, as we saw, has both electoral and non-electoral ramifications.
- Note: It is unclear whether **far-right violence induces backlash or contributes to stigmatisation**.
  - The findings by Krause and Matsunaga (2023) as well as Sabet et al. (2025) caution, at the very least, against treating this assumption as axiomatic.
  - De Juan et al. (2025) find that hate crimes can lead to more stigmatisation, but only when they are covered extensively in the media and framed as driven by radical-right ideology / motivations.

Evolution of salience online and in newspapers in Germany following terrorist attacks abroad, 2015 to 2017



Giavazzi et al. (2024)

Agenda

1. The rise of right-wing populism (RWP): Definitions and stylised facts
2. Explanations for the emergence of RWP forces
3. The consequences of RWP
4. What if, anything, can we do about countering RWP?

Preliminary points: How (not) to think about counter-measures? The elusive quest for the “root causes” of right-wing populism

The folk theory of fighting populism suggests the following “algorithm”:

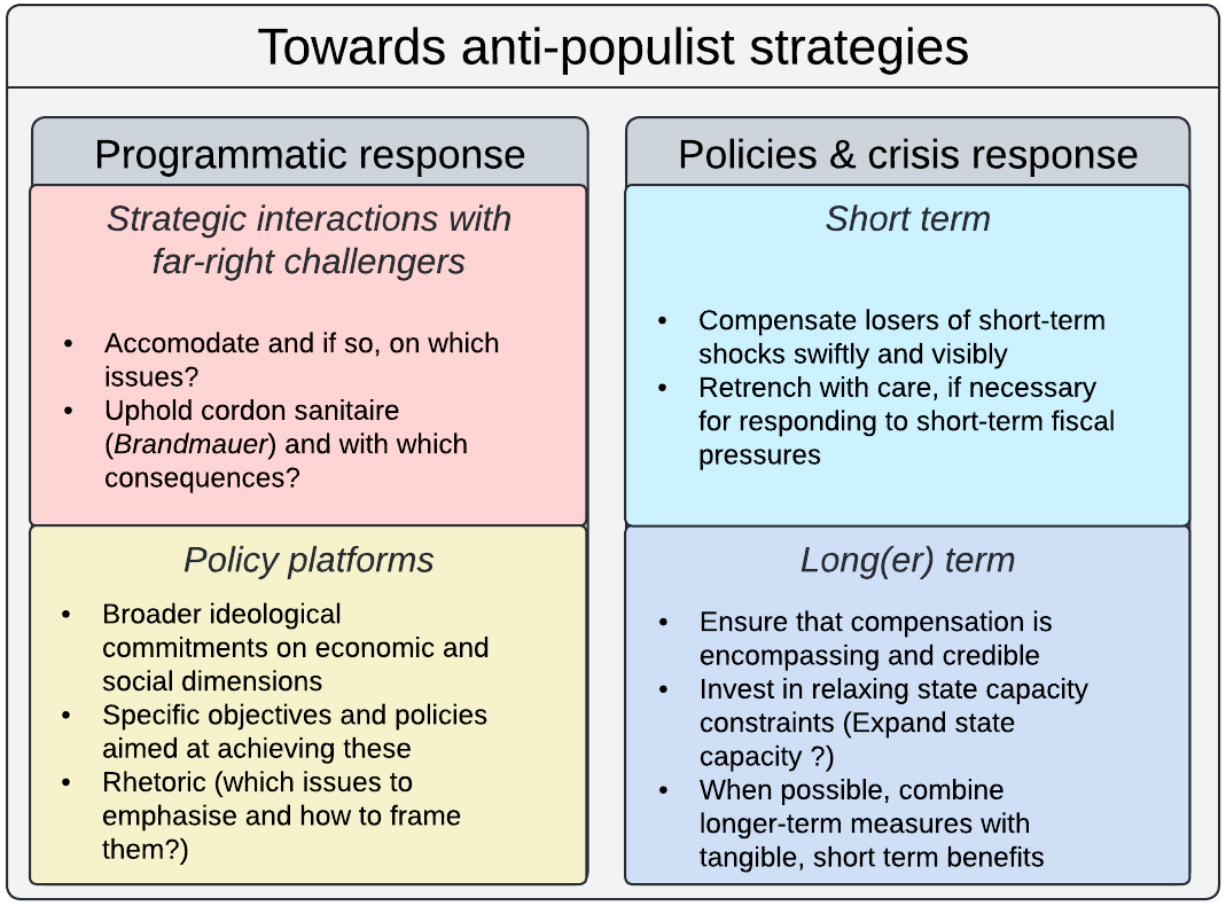
1. Review and synthesise the evidence on the causes for right-wing populism.
2. Write out the *directed acyclic graph* (or some structural model) based on this review.
3. Identify the “root causes” – **those factors that, when not present, would switch off the greatest number of paths connecting one of the causes to right-wing populism**.

Rests on at least two strong assumptions:

1. The evidence is *sufficiently good* and *comprehensive* for us to be able to write out the correct DAG / specify the structural model.
2. There is no asymmetry in the effects between presence and absence.

→ Good knowledge of the causes literature helps, but it is not sufficient for devising counter-measures

The components of anti-populist strategies



Programmatic responses

Understanding the accommodation debate: Revisiting the basics of electoral competition (Option 1)

- Accommodation = **moving closer to the radical right on immigration**
- Intuition: Move closer to radical right and thereby siphon off voters
- Theoretically, when does this intuition hold?
  - When voters care only about "spatial alignment",
  - there are no perceived differences in valence on the immigration dimension (perceived competence or trust),
  - policy shifts do not affect salience or
  - change preferences in ways that benefit the radical right, and
  - voters regard policy shifts as sincere, rather than opportunistic.
- Empirically, the question then becomes: **in which contexts do these conditions obtain?**

A quick look at the empirical literature

- **Observation**: It is very common for mainstream parties to accommodate radical-right parties on the immigration (also European integration) issue, particularly when its salience increases.
- Reasons:
  - Influence of party activists (Margalit et al. 2022)
    - Shift in salience and popularity of radical-right positions increase willingness of party elites to listen to **party activists with extreme views**
  - Initially blurry position on these issues due to intra-party conflicts
    - Shift in salience and popularity of radical-right positions increase **relative power of culturally conservative factions** (Lehmann 2024)
- Does accommodation work?
  1. Electoral arithmetic / calculus
     - The literature suggests that accommodation works "electorally" only under very specific circumstances (Hjorth and Vinaes Larsen 2022, Wildi 2024), if at all (Chou et al. 2021, Krause et al. 2023).
     - Valence- and salience-related aspects usually neglected in purely spatial discussions
  2. **General equilibrium considerations** → even if programmatic accommodation generates votes on net, it might also set in motion of **normalisation / legitimisation** (Daur 2025) that, as we saw above, might make radical-right views more acceptable, thus "activating" attitudes and shifting the salience in ways that favour populists

The cordon sanitaire: Definition, costs, and benefits (Option 2)

Cordon sanitaire or firewall (*Brandmauer*): Commitment by mainstream parties to *not* govern with radical-right parties

Rationales for the cordon sanitaire:

- Prevent **institutional damage** (bad policy outcomes) by keeping radical-right parties out of executive power (Funke et al. 2023)
- Prevent **normalisation of far-right attitudes** (Jacobs and Pilet 2024, Daur 2025, Vanagt et al. 2025)
- **Buy time** for policy investments to yield benefits in the future

Costs of the cordon sanitaire:

- Size and internal heterogeneity of coalitions increases in expectation coalition formation takes more time (Bäck et al. 2024) and **policy stability increases** (in particular, it becomes more difficult to adopt large-scale reforms)
- Fuels **sense of exclusion** among supporters of radical right
  - Marginal damage low given that they are already very dissatisfied?
- No room for radical right to reveal its incompetence (*Entzauberung*)
  - Doubtful this works (see above)

When is the cordon sanitaire a good idea?

Condition	Benefits Likely > Costs	Costs Likely > Benefits
Institutional risk from RR in power	High: RR likely to damage institutions, bureaucracy, media independence, etc.	Low: institutional constraints strong; RR influence expected to be limited
Normalisation dynamics	High risk of norm shift & long-run legitimation if RR enters govt	Stigma already low, norms already shifted, or cooperation unlikely to shift norms
Potential of policy investments to win back RR voters	Underlying grievances require time and capacity to address	Policy investments won't generate net vote gains at expense of RR parties
Greater and more ideologically heterogeneous coalitions	Mainstream political parties exhibit low degree of polarisation, meaning it is possible to engage in effective policymaking	Mainstream political parties are fairly polarised; large / heterogeneous coalition governments will result in gridlock and policy drift
Sense of exclusion among RR voters	Low marginal effect, given high baseline distrust among RR voters	Most RR voters are 'marginal': they have pretty high trust and, by excluding them, trust is eroded
Revealing incompetence of RR actors	Voters will not sanction RR for bad outcomes (e.g. because they can deflect blame via minority government constructs, multi-level dynamics, or deep-seated distrust in mainstream actors and institutions)	Voters will sanction RR for bad outcomes (e.g. because they can deflect blame via minority government constructs, multi-level dynamics, or deep-seated distrust in mainstream actors and institutions)

Is the cordon sanitaire stable?

- Under some conditions, it may be **collectively optimal** to uphold the cordon sanitaire. But is this also **individually rational**?
- **Individual incentives to defect** (Delgado-Vega and Schneider 2024)
  - RR becomes **pivotal for forming government** → cooperation becomes instrumentally necessary to hold office *Exclusion optimal early, cooperation optimal once RR gains support*.
  - **Intra-party competition** creates private benefits from differentiation (e.g., centre-right factions use cooperation to outflank centrist rivals for leadership or voters) → *Ziblatt (2017): breakdown occurs when conservative elites jump on the radical right's bandwagon rather than contain them*.
  - **Short-term policy concessions > long-term institutional risks**
    Especially on high-salience issues (immigration, sovereignty) where concessions satisfy median voter blocs.
  - **Costs of defection are externalised** (coalition constraints, federal structure, courts, EU blamed for unpopular policy outcomes)
  - First mover erodes norms underpinning non-cooperation → **cascade dynamics**: *cooperation becomes the new focal equilibrium*
- Resulting equilibrium: Defection changes expectations → cooperation becomes new political "normal". Once broken, cordon hard to restore → ***path-dependent collapse***
- **Takeaway**: Firewalls break down because the incentives of individual mainstream actors diverge from the collective interest in democratic containment.

So, is the cordon sanitaire stable in Germany? Conservatives' flip-flopping makes me pessimistic

Nov 24, 2025

euobserver

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Germany's Merz under pressure from CDU to abandon 'firewall' against AfD

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1 co-observer

As Germany readies itself for five separate state election
Friedrich Merz's centre-right Christian Democrats faces
handle the surging influence and popularity of the far-ri

Medienbericht über Umgang mit rechts

Verband der Familienunternehmer gibt offenbar Brandmauer zur AfD auf

Der Lobbyverband »Die Familienu
die in großen Teilen rechtsextrem
aufgehoben, berichtet die Verban

24.11.2025, 04.41 Uhr

Umgang mit der AfD

Einzelne Unionspolitiker fordern Abkehr von Brandmauer

Stand: 15.10.2025 07:42 Uhr

In manchen Umfragen liegt die AfD bereits vor der Union - im Osten sogar mit deutlichem Abstand. Mehrere einstmals einflussreiche Unionspolitiker fordern ein Umdenken. Sie glauben, wer die AfD stets isoliere, mache sie nur noch stärker.

Ehemals einflussreiche Unionspolitiker fordern einen Kurswechsel im Umgang mit der AfD. Der frühere CDU-Generalsekretär Peter Tauber, der frühere Bundesverteidigungsminister Karl-Theodor zu Guttenberg (CSU) und der einstige Vorsitzende der CDU-Grundwertekommission Andreas Rödder machten sich im Magazin Stern für eine Abkehr von der Brandmauer gegen die AfD stark.

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Germany's Merz rejects working with far right, says AfD wants to 'destroy' his conservatives

"The hand that the AfD keeps reaching out is, in reality, a hand that wants to destroy us," says German chancellor after marathon debate on far-right cooperation.

COPY LINK



Concrete scenarios for the collapse of the German *Brandmauer*

Scenario	Mechanism of Breakdown	Why It's Attractive to Defectors	Risks / Likely Consequences
(1) Formal CDU–AfD coalition at federal level	• Hard-right faction prioritises policy goals over vote/office-seeking • AfD becomes main vehicle for maximising chances of holding power	• Delivers conservative-nationalist policy agenda directly • Serves office-seeking motivations	• High reputational cost IF "grim trigger" by other parties limits future coalition options; CDU dependent on the AfD • Other parties have little incentive to play grim trigger
(2) CDU minority federal government dependent on AfD votes (no formal coalition)	• Cooperation is indirect + plausibly deniable • Ideal for the AfD: can influence policy, but deflect blame when something goes wrong	Will likely be frames as necessary to avoid "ungovernability" due to big/ideologically heterogeneous coalitions; lower risk of sanctioning by voters	Normalisation without accountability; reduces stigma; prepares ground for later formal cooperation (see 1)
(3) State-level CDU–AfD coalition in East German Länder	Federal leadership unable to discipline regional branches	Seen as the only path to regional power; strong Eastern CDU sympathy for AfD	Normalisation diffuses upward; increases federal coalition probability (see 1)
(4) State-level CDU minority govt supported by AfD ("Kemmerich+")	Cooperation obscured through procedural agreements	Enables de facto cooperation while minimising electoral visibility	Voters may not sanction; creates precedents difficult to reverse; stealth legitimation

Policy & crisis response

Crisis response and policies

- Status quo of discussion:
  - Promote policies – that one favours independently of their effects on support for populism – and argue that these policies will almost certainly produce welfare gains that populist voters can't help but desert populists.
  - Instead of playing this game, let us try to think about the criteria that policies have to meet for them to help us fight populism.

1. Compensating losers in the short- and long-term – visibly, swiftly, and credibly
2. Retrench with care (if necessary)
   - See the literature mentioned above on austerity
3. Pay attention to the temporal sequencing of policies (Fetzer et al. 2025)
4. Invest in relaxing state capacity constraints (Schularick 2021, Fetzer et al. 2024)

Countering populism: A guide to what we (don't) know

Target	Time horizon	Programmatic responses	Policy responses
Demand side (voters' beliefs and preferences)	**Short-term**	• Wedge-issue appeals that split radical-right coalitions (Haas et al. 2023). Highlighting radical-right hypocrisy or self-interest (Galasso et al. 2022). • Avoid rhetorical, without programmatic, accommodation (Kollberg 2025); only accommodate programmatically when (narrow) conditions for success met (Hjorth and Vinaes Larsen 2022, Wildi 2024 Chou et al. 2021, Krause et al. 2023) • Use rhetoric and cordon sanitaire to prevent norm erosion and institutional damage (Valentim et al 2025; Jacobs and Pilet 2024, Daur 2025, Vanagt et al. 2025)	• Visible and swift compensation in response to shocks, such as the 2022 energy price shock (Edenhofer & Genovese 2024, Konc et al. 2025). • Combine material compensation with counselling or other types of personalised recognition (Buergisser et al. 2025)
	Medium to long term	• Unbundle immigration: be tough on low-skilled immigration, but open on high-skilled one (Kustov 2025); is this possible? • Invest in raising salience on issues on which mainstream enjoys valence advantages (redistribution & fairness for centre left; macro-economic management for centre right). How?	• Place-based regional investment can reduce far-right support and increases institutional trust (Gold & Lehr 2024). • Visible place-based improvements: high-street revitalisation reduces perceived abandonment (Fetzer et al. 2025; see also UK Power to Change Cremaschi et al. 2025a,b). • Embrace policy experimentation at local level to facilitate learning and enable participation (close 'representation gaps')?
Supply side (parties, bureaucracy, etc.)	**Short-term**	• Maintain cordon sanitaire. • Disempower activists, especially when it comes to leadership selection (Margalit et al. 2022; Kernell 2025, Rosenbluth and Shapiro 2019)	• Protect career civil servants (how exactly?) • Increase bite of audits, especially in procurement, to reduce scope for favouritism and corruption • *Radikalenerlass* for AfD sympathisers in the civil service? (Bischof and Valentim 2022)
	Medium to long term	• Address *group* (who belongs to the nation?), *grid* (participatory vs. technocratic governance), and *greed* (extent and type of redistribution) in world of escalating climate change, geo-economic competition, etc (Rehm and Kitschelt 2014). • For grid, balance two tensions: technocracy vs. majoritarian democracy (Gratton & Edenhofer 2025); nation state vs. supranational delegation (Colomer 2020). But how?	• Media pluralism regulation and anti-monopoly rules to prevent political capture (Szeidl& Szucus 2021, Grossman et al. 2022) • Strengthening independent electoral commissions • Judicial independence protections (appointment rules, tenure security). • Party reform that reduces cartelisation and improves responsiveness; but how? Descriptive representation (Zuern & Schaefer 2023)? What else?

Taking stock

Summary: Ten lessons on right-wing populism

1. Contemporary party systems **reflect long-term structural changes in party competition**, including the emergence of a **second, non-economic ("cultural") dimension**, that have made it harder for mainstream parties to hold together increasingly **heterogeneous electoral coalitions** while facing challengers on both the left and right. These pressures have contributed to greater **party-system fragmentation** and **electoral volatility**.
2. The **culture-versus-economics dichotomy** is misleading; both types of factors interact. Existing work has begun to map these mechanisms, but major questions remain about how they interact across time, space, and issue domains.
3. Changes in electoral outcomes are likely driven as much (if not more) by **shifts in issue salience and valence perceptions** (competence and credibility) as by shifts in underlying attitudes.
4. **Electoral systems** influence whether populism emerges through new parties (e.g. PR) or through the takeover of existing ones (e.g. SMSP). At the same time, the **spread of mobile internet and social media**, along with the **decentralisation of party organisations**, has **lowered barriers to entry for populists**, facilitating their rise across different electoral systems.
5. The decline of **traditional organisational linkages**, such as party memberships, unions, and civic intermediaries, has reduced mainstream parties' capacity to **aggregate interests**, manage internal conflict, and **retain voter loyalty** when core supporters bear the short-term costs of long-term policy investments. This has contributed to more myopic and "symbolic" policymaking.

Summary: Ten lessons on right-wing populism (cont'd)

6. When radical-right parties hold power, they tend to **erode democratic institutions**, for instance, by politicising public administration, weakening horizontal accountability, and reducing protections for minority rights.
7. **Programmatic accommodation can yield electoral gains, but only under narrow conditions** (e.g., when mainstream parties retain issue ownership and avoid normalising the radical right).
8. The **indirect effects of accommodation**, particularly increases in issue salience and normalisation dynamics, tend to outweigh direct electoral effects.
9. A **cordon sanitaire is collectively optimal** when the expected institutional risks of including the radical right outweigh the governance and representation costs of exclusion. It is sustainable only when no mainstream actor has an **incentive to unilaterally deviate**. Once deviation occurs, restoration is difficult.
10. RWP is here to stay; **countermeasure should focus on containing the damage done by RWP**, rather than turning back the clock. More research is direly needed!