The Backlash against Globalization: What's Next?

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Overview

Layna Mosley and B. Peter Rosendorff

During the last decade, governments worldwide have taken steps to limit their countries' engagement with the global economy, via increased barriers to the movement of goods, services, capital and people. Most visible among these are the UK's withdrawal from the European Union and the United States' 2017 implementation of tariffs against a wide range of Chinese products (many of which remain in place). These policy shifts often are attributed to the growing political salience of anti-globalization attitudes. The growing hostility of some elites and some mass publics also manifests itself in declining support for the pillars of the "liberal international order," such as the World Trade Organization and the International Monetary Fund.

Scholars of political economy have sought to understand both the causes and the consequences of the anti-globalization backlash (in terms of attitudes) and deglobalization (in terms of policy). Yet there remains much to understand about the current era. For instance, it may be less that mass attitudes have shifted, and more that they have become more relevant to political elites' decisions. And trade shocks are not the only cause, nor even the most important cause, of the backlash. It may be more a response to broader patterns of deindustrialization, as well as growing income inequality, the latter made especially visible after the 2008 global financial crisis. Moreover, economic shocks do not always turn individuals against global engagement; race, gender and occupational characteristics all affect perceptions of and responses to economic shocks.

To address the political economy of deglobalization, the Niehaus Center for Globalization & Governance organized a workshop in May 2022. Over two days, twenty scholars presented their research – some completed papers; others ongoing research projects; and still others in the planning stages. Many participants also wrote short summaries of their research, which form the core of this report. We note a few themes which emerged from our conversations at the workshop, and which strike us as important for policymakers, social scientists and others interested in the future of global economic engagement. These themes also feature in many of the short chapters of this report.

What, Where and Why a Backlash? The post-World War II economic order has been characterized by a deep integration of national economies, as well as a dense set of multilateral institutions. Barriers to goods and services trade have fallen worldwide, capital flows quickly and freely, and in some parts of the world, people migrate across relatively open borders. This economic openness has been facilitated by a set of international institutions which create rules to guide and harmonize member states' policies; monitor member states' behavior; and limit governments' incentives to take opportunistic actions. Globalization has been associated with higher rates of economic growth, as well as a dramatic decline in the percentage of the world's population living in poverty. In many countries, domestic publics have been broadly supportive of globalization.

In the beginning of the twenty-first century, however, this domestic consensus began to unravel. The rapid rise of China as an exporter of manufactured goods exacerbated the slow decline of manufacturing activity (and the associated decline in real wages among manufacturing workers) in wealthy countries. This decline, which had begun decades before, also was intensified by the emergence of cheaper long-distance transportation and communication technologies, which allowed for the creation and growth of geographically-dispersed supply chain production. Firms based in the US and Europe could source and produce goods and services in their most cost-effective lo-

cations, which often were in developing nations. Many individuals in wealthy economies, often accustomed to the benefits of economic openness, found themselves increasingly exposed to competition from abroad, as well as to the worry that their job might be offshored or outsourced. A significant portion of this group was able and willing to deploy their political voice to oppose economic integration.

We therefore witnessed a pronounced political backlash against globalization and a concomitant rise in right-wing populist political candidates and parties. Governments have reinstituted or raised trade barriers, tightened borders and weakened their commitments to international organizations. The World Trade Organization (WTO) struggles to remain effective, while decisive multilateral agreements to deal effectively with climate change remain elusive. Facing competition from alternative sources of development finance and crisis lending, the World Bank and the International Monetary Fund (IMF) have become less able to compel governments toward market liberalization.

Globalization's opponents are a varied group. Much of the support for populist, nativist right-leaning parties in European countries is grounded in anti-immigrant sentiment (even while there is little evidence that locales with more immigration were more likely to elect populist newcomers). In the US, by contrast, support for Donald Trump correlated with anti-trade views. In the developing world, anti-globalization sentiment also often has its roots in negative attitudes toward migrants, even as potential migrants are attracted to potential employment opportunities abroad.

Trade, however, is but one source of economic shocks. Another was the 2008 global financial crisis. Among other things, this crisis shifted the balance of financial – and then political – power among firms. And trade is only partly responsible for the de-industrialization and income shocks that have affected the employment prospects for manufacturing (and some service sector) workers. Technology also plays a role, as a facilitator of trade and offshoring as well as automation. Changes in communication and manufacturing technology affect employment: robots or touch screens replace workers with less formal education, while simultaneously enhancing the productivity of highly skilled workers. Less skilled workers often are affected by trade and automation simultaneously, making it especially difficult to disentangle the effects of each on political attitudes and action.

Some ongoing research suggests that individuals are more inclined to blame industrial decline on trade and immigration, rather than on innovation or automation. Indeed, voters in wealthy nations appear to assume that policymakers can reverse, and are responsible for, trade-induced job loss, whereas they are not responsible for the (perceived to be irreversible) employment effects of automation. Automation also increasingly affects services, which are an important portion of trade in many wealthy countries; hence the "losers" from automation, technology and offshoring will shift, perhaps altering the domestic politics of economic shocks.

Anti-outsider populist sentiment also has historical parallels. The current wave of anti-globalization sentiment has its roots in import competition in wealthy nations in the 1970s and 1980s; this competition intensified with China's liberalization and subsequent (2001) accession to the WTO. But Han, Milner and Mitchener suggest that local areas of the U.S. that were supportive of populist parties in the 1890s often are the same regions with high vote shares for Donald Trump. Similarly, Scheve and Serlin demonstrate that trade openness and transportation technology combined in late 19th century United States to reduce employment in export-focused sectors and heighten support for trade protection.

Who Reacts Against Globalization? The political effects of economic shocks have been well studied. In both the U.S. and Europe, local regions that have suffered deindustrialization (often addressed empirically using the "China shock") have voted out incumbents in favor of political outsiders, including Trump in the US and far-right parties in Germany. These aggregate political outcomes, however, do not require shifts in political sentiments among large swaths of the electorate. Indeed, the average voter in the US – at the congressional district level or at the national level – was unlikely to express anti-globalization sentiment in 2000, nor at any point since then. A broad shift in attitudes, then, cannot be the explanation for the electoral success of many populist, anti-globalization candidates.

Political outcomes are not only about the average voter. Rather, attitudes vary substantially across domestic groups: some types of voters react strongly against globalization, while others continue to support openness. Shifts among a small set of voters can generate marked changes in political outcomes, especially in countries with majoritarian (rather than proportional) electoral rules.

Mass attitudes toward globalization vary markedly within countries, on the basis of gender, race and ethnicity, geographic location and occupational skill, among others. Understanding how individual and group attributes affect responses – in attitudes as well as political behavior – to economic shocks and economic openness remains an important task for researchers. It is increasingly clear that identity- and culturally-based attributes are deeply intertwined with material factors; political economists continue to work to disentangle these dynamics.

Individuals vary markedly in their exposure to globalization-related income shocks, as well as in their susceptibility to automation. Even workers within the same firm may be differentially exposed to risk, as a result of the tasks they perform. Rosendorff and Bisbee develop a measure of labor market anxiety, combining immobility with exposure to a trade shock. Anxiety leads individuals to express anti-trade and anti-immigrant sentiment. Occupational traits and skill profiles can lead otherwise-similar individuals (in terms of education levels, ideology or age, for instance) to vary markedly in their attitudes, as well as in the anxiety that global integration provokes.

Perception – which may differ from material reality – may be important in individual responses to economic shocks. Ballard-Rosa and colleagues find that, in the United States, individuals who believe that their opportunities for upward mobility have been stymied by international integration are also likely to harbor populist sentiment. Political elites sometimes suggest to voters that global economic phenomena are to blame for their misery, so that these perceptions may not be entirely "bottom up" in their origins. Elite cues matter in a range of countries and political systems; Katitas and Omran, for instance, suggest that voters take cues from protectionist candidates in Turkey.

Much of the backlash in the US is centered along racial lines. White Americans view offshoring not only as bad for the United States overall, but also as disproportionately affecting white Americans like themselves. In the heyday of U.S. manufacturing prowess, strong labor unions and racism (which excluded Blacks from unions) all but guaranteed high paying jobs to white men in manufacturing – and also reduced their relative benefits from education. Deindustrialization hit white men the hardest: having foregone investment in higher education, white men reacted to this shift by supporting exclusionary policies and populist candidates, while others that had invested in education and training were better able to adapt.

Economic shifts and shocks also play out within households. When one's partner experiences an income shock, the attitudinal effects may affect the entire household. Richard Clark, Roza Khoban and Noah Zucker find that, in households in which men have suffered unemployment shocks, women are more likely to express anti-globalization sentiments. This effect is especially pronounced in culturally conservative communities, perhaps because income shocks shift household work and earning dynamics in unwanted ways.

Our workshop conversations suggest some progress, but also much is left to explore, to understand the various determinants of individual-level attitudes. Several participants in the workshop are in the process of designing new surveys addressing these issues.

Where Do We Go From Here? Given what we know about the existence and the causes of the backlash of globalization, what might we expect about the future of national policies, and of economic globalization? Are there policies which might address some of the dislocations related to de-industrialization and globalization and, therefore, restore support for integration and engagement?

Many observers have attributed the backlash to the failure to enact or sustain an "embedded liberalism" compromise, in which those who gain materially from openness compensate those who lose. By sharing some of the gains from openness, the "winners" can buy the political support of the "losers." This compromise, which facilitated the restoration of economic liberalization in European countries in the post-World War II era, was always limited in scope in the United States.

Today, the political will for larger social safety nets and unemployment insurance – funded through higher levels of taxation – is largely absent. In other countries, the appetite for redistributive policies also is limited: some governments worry that higher taxes on corporations or wealthy individuals, likely necessary for redistribution, will lead to capital flight. Megumi Naoi's analysis suggests that even increased domestic transfers can stoke resentment: she considers responses in the U.S. to government transfers in the wake of the 2008 financial crisis. She finds that those who do not receive stimulus package-related benefits resent those who do, hardening support for "small government." Other research suggests that this resentment may have a racialized element.

Looking instead at policies aimed at facilitating a green transition, Voeten finds that individuals in the Netherlands who are more affected by an increase in energy taxes – the result of government efforts to discourage the use of natural gas – are more likely to support populist radical right parties. His analysis suggests that opposition to a green transition could become another pillar (alongside immigration and trade openness) for populist right candidates and parties.

Nina Obermeir offers a more optimistic analysis. She notes that support for economic integration appears to again be on the rise in many European countries, even as a portion of the public supports far right parties. She suggests that a "backlash against the backlash" is occurring: mainstream voters, often supportive of economic openness but less likely to act politically to preserve it, are frustrated with the extremist language and anti-internationalism of far right parties and supporters. In response, some moderates become more internationalist in their stances, possibly shifting the balance of domestic public opinion.

As the first quarter of the twenty-first century draws to a close, global economic integration faces many challenges. These include the COVID-19 pandemic and associated nationalism surrounding PPE and vaccines; Russia's war in Ukraine and the hesitancy of some governments to take more decisive action to cut Russia's access to export revenues; and the fragility of geographically dispersed supply chain production. But these are symptoms, rather than causes, of a longer-term erosion of support for global economic integration. To understand the prospects for the future of the global economy, and for a renewal of multilateral efforts to govern that economy, we must understand mass and elite politics within countries – not only the US or other wealthy nations, but also in newly-assertive large developing countries (China, India), and in emerging and frontier markets more generally.

2

Economy and/or culture? In Search of the Causes of the Globalization Backlash, between Methods and Evidence

Paolo Agnolin, Italo Colantone and Piero Stanig

The success of nationalist, isolationist, and radical-right parties and candidates in Western democracies has stimulated a lively academic debate. Scholars are far from reaching a consensus regarding the determinants of this phenomenon, which is widely referred to as "globalization backlash".

Several studies have shown that the backlash is linked to economic distress, especially as driven by globalization (e.g., Colantone and Stanig 2018ab; Dorn et al. 2020, Milner 2021) and technological progress (e.g., Anelli et al. 2021; Gallego and Kurer 2021; Milner 2021). The main idea behind these studies is that structural economic changes create winners and losers, and the ensuing economic grievances foster anti-establishment voting. Scholars pointing to a different family of explanations emphasize how recent political developments result from a "cultural backlash". Within this context, a prominent role is played by the status threat posed by international migration, changing race and gender relations, as well as demographic trends (e.g., Hangartner et al. 2019; Norris and Inglehart 2019; Mutz 2018).

Some observers see economic and cultural explanations of the backlash as fundamentally alternative: it has to be one or the other. Instead, we believe that there is sufficient empirical evidence at this point to conclude that *both* economic *and* cultural explanations are crucial to account for contemporary trends in electoral outcomes. Our view is not uncommon in the literature (e.g., Franzese 2019; Frieden 2022), where scholars have also emphasized how economic and cultural factors may interplay with each other. In particular, a growing body of evidence documents the impact of economic factors on individual attitudes such as nativism and authoritarianism (e.g., Anelli et al. 2021; Ballard-Rosa et al. 2021, 2022; Colantone and Stanig 2018c; Carreras et al. 2019; Ferrara 2022; Hays et al. 2019). At the same time, scholars have highlighted how cultural concerns may foster the political salience of economic shocks (e.g., Gidron and Hall 2017; Margalit 2019).

In a recent paper (Agnolin, Colantone and Stanig 2022), we discuss the methodological challenges posed by the interplay between economic and cultural factors. These challenges translate directly into matters of research design. In fact, a standard approach to study the causal structure of the globalization backlash relies on a sort of "horse-race" empirical strategy. In this approach, economic and cultural factors are included jointly as explanatory variables in a vote regression. Loss of statistical significance for, say, the economic factor, as compared to a regression that omits cultural variables, is then interpreted as evidence that "the economy does not matter". However, if cultural variables are post-treatment with respect to economic shocks, it is impossible to accurately estimate the *relative* role of the two in a horse-race approach. Moreover, the estimates of the effect of economic shocks are also going to be biased. Mutatis mutandis, exactly the same considerations can be made for cultural factors.

In Agnolin, Colantone and Stanig (2022), we illustrate this methodological issue with a contrived example on the backlash, complemented by regressions on simulated data, and novel empirical results on fifteen western European countries, where we consider an array of cultural traits, and exposure to Chinese imports as the economic shock. Clearly, we do not have the pretense of being very innovative in this exercise, as there is ample literature regarding post-treatment bias (e.g., Acharya et al. 2016; Montgomery et al. 2018). Yet, our impression is that the substantive and practical implications of this methodological issue have not been fully appreciated in some of the recent voting behavior debate. In this respect, we hope that our exercise may be useful to provide some more structure to this debate.

What are the possible ways forward? It is tempting to believe that causal mediation analysis can be leveraged to make progress. Mediation analysis allows, under certain conditions, to disentangle direct and indirect effects, with the latter being "transmitted" by a mediator. In our example, the economic shock originated by Chinese import competition is the exogenous variable; voting behavior is the outcome of interest; and the effect of the economic shock might be at least partially mediated by individual cultural attitudes like nativism. Unfortunately, we show that the same underlying problems that invalidate the horse-race approach also pose threats to valid mediation analysis. That is because, as warned by its proponents (e.g., Imai et al. 2011), causal mediation analysis hinges on assumptions, like sequential ignorability, which are very unlikely to hold in this context.

Indeed, these assumptions would require not only exogeneity of the import shock, but also homogeneity of the distribution of potential outcomes across different values of the mediator. Yet, for instance, displaying anti-immigration attitudes, vs. remaining pro-immigration, after being "treated" by an economic shock, might very well depend on one's latent political predisposition, which is related to one's vote choice regardless of economic distress. As emphasized by Imai et al. (2011), such an issue is not necessarily solved even when one can rely on exogenous as-if random variation both for the treatment and for the mediator. In light of this, carefully designed experiments seem to provide the most promising avenue for further research, although with the inherent caveats for external validity.

Overall, our bottom line is that a study of the backlash that uses a plausibly-identified strategy for estimating the effect of an economic shock, but does not "control for culture", might be better than one that does, and symmetrically for cultural drivers. Echoing Gelman and Imbens (2013), the big question regarding what are the causes of the globalization backlash is worth asking, but knowing that, ultimately, it cannot be answered in that form in a single empirical analysis. A thorough answer in a principled causal framework will take the form of separate claims about the role of one given factor at the time. Building a cumulative body of such results might be the best way forward, also in view of informing policy action. Ascertaining precisely the relative role of economic vs. cultural factors may not be so crucial in terms of policy implications. Conversely, dismissing the economic roots of the backlash based on questionably-specified empirical analyses may be very dangerous.

3

Why Do Layoffs Have Different Political Effects?

Leonardo Baccini, Costin Ciobanu and Krzysztof Pelc

Forty years ago, as the US was escalating its trade war with Japan, the economist James Ingram offered an inspired economic allegory. A young entrepreneur opens a factory that runs on technology that is so advanced that it hardly requires any human workers. It proves more productive than anything that came before it. The entrepreneur is hailed for his inventiveness and its contribution to the national economy. Until a journalist exposes the factory as a sham: it turns out the entrepreneur has simply been outsourcing production to a foreign country, and importing the result back into the US. Following this revelation, the entrepreneur is roundly condemned for betraying the common good by destroying US jobs.

Ingram's economic allegory has only become more relevant over the last four decades: technology-driven labor displacement and offshoring have both increased in importance. Of course, economically speaking, both scenarios have equivalent effects. Whether jobs are displaced because of automation or trade shouldn't matter: consumers gain in each case through access to cheaper goods, and the redundant labor can be reallocated to other tasks. Similarly, from the standpoint of individuals who lose their jobs, it shouldn't matter whether the cause is technological progress or foreign workers.

Yet the political effects of each scenario are very different. That's why politicians often denounce competition from international trade as unfair and take protectionist measures against it. Lashing out against offshoring and trade was a hallmark of Donald Trump's 2016 campaign. But Democrats are also highly critical of offshoring: in 2020, President Biden proposed a 10% tax surcharge on American companies that produce goods and services overseas to sell back on the U.S. market. By contrast, politicians almost never take action against technology-driven labor displacement.

Understanding the reasons for this difference matters: we know that declines in manufacturing employment have coincided with a wave of right-wing populism across industrialized democracies. Yet understanding exactly how these two are linked is a difficult task. To tackle it, we ran a survey experiment. The results led us to a greater appreciation of how much identity matters to individuals' evaluations of economic outcomes.

As it turns out, all layoffs are not the same. Some lead to a far more poignant sense of loss and social decline than others. The difference seems to depend most on who gains. Offshoring activates status concerns in a way that automation does not, because it benefits an identifiable out-group: foreign workers. What is at stake in the case of offshoring is thus not only material gains and losses, but social standing. The sentiment is that "if others gain, we must be losing."

But not everyone holds this perception. The effects of offshoring on subjective status have a disproportionate effect on those who view themselves as part of the historically dominant group. In the case of the US, that group corresponds to white people. This view was aptly summed up in "Identity Crisis", a 2016 book by John Sides, Michael Tesler, and Lynn Vavreck which provides an account of Donald Trump's election: "The important sentiment underlying Trump's support", they write, "was not 'I might lose my job' but, in essence, 'People in my group are losing jobs to that other group.'" This is the logic we set out to test in our survey experiment.

First, we find that while all layoffs increase the appeal of populist messaging, technology-induced layoffs have a smaller effect on than layoffs due to

offshoring. More interestingly, this effect is significantly stronger for white Americans. When we dug deeper, we found not only that white Americans view offshoring as leading to greater total harm to the American economy and to the US position in the world, but they view it as disproportionately affecting white Americans like themselves. While all groups viewed the harm caused by offshoring to be greater for their group than other groups—something we refer to as the "in-group victimhood bias"—we find that whites exhibit this bias at a significantly higher level than non-whites.

In part, this seems to be because whites in the US perceive their social standing as negatively affected on both sides: they claim to lose more from offshoring than other Americans, and they perceive the out-group—that is, foreign workers—as gaining more. As a result, whites believe that offshoring reduces their social standing more than non-whites. Our results hold the key to understanding why populist political candidates, especially those on the political right, are so drawn to trade protectionism, while technology—which objectively speaking leads to greater economic dislocation—makes for a less tempting political target.

These findings also hold important implications for the common portrayal of the "white working class" in the media, in political discourse, and in academic scholarship. Contrary to popular perception, the evidence suggests that the white working class has not been more materially harmed by the economic shocks of the last two decades than non-white workers.

So why is the group tagged as the victims of deindustrialization invariably the "white" working class? Our results suggest that this may be due to how Americans read economic shocks through the lens of group identity. Specifically, losses of the same magnitude are perceived by whites as having more deleterious effects on the country, on their own identity group, and on their individual standing. As a result, white Americans have been more likely to respond to these shocks by shifting their political allegiances in dramatic fashion, as illustrated by the 2016 American presidential elections. In other words, the greater political response of one group to the same economic circumstances has led to disproportionate attention being paid to them, which itself has shaped the public narrative, creating the popular perception that the white working class has suffered disproportionate losses.

The much talked about globalization backlash of the last decade appears to be a largely white phenomenon. Looking at non-white Americans, there is considerable economic pain, but no backlash to speak of. Our findings demonstrate how such public perceptions form in the first place, by identifying the individual-level biases that fuel them, and how these biases systematically map onto group identity. The result is that some economic events attract more attention than others, from policymakers and scholars alike.

4

Anxiety and Anti-Globalization Sentiment

James Bisbee and B. Peter Rosendorff

Political support for protectionist, isolationist, and anti-immigrant politicians has surged among advanced industrial economies. This is especially true in regions or districts that have suffered from deindustrialization, perhaps due to substantial increases in the imports of manufactured goods from China. Surprisingly, when individuals in the hard-hit districts are surveyed, the average respondent does not express anti-outsider, or anti-trade sentiment.

We suggest that querying the "average" respondent is looking for the effect of globalization in the wrong place. Individuals are heterogeneous, even within a district, and some individuals are more likely to be adversely affected by shocks to import-competing industries than are others. Our core contribution is to emphasize the anxiety-inducing effects of labor market uncertainty, moving beyond a narrow definition of free trade's losers to include those who may not have yet lost, but whose welfare is nevertheless threatened by cheaper imports.

While some industries decline, others expand, and those workers who can move to growing sectors and communities suffer less (and are less likely to be hostile to international trade) than those that are occupationally and geographically less mobile, trapped in a job with little prospects in an industry in decline.

This particularly potent mixture of occupational immobility, and direct exposure to shocks from abroad has the greatest effect on anti-globalization sentiment. This combination of immobility and exposure heightens anxiety, or perceptions of increased labor market risk, and it is these people who express the most severe hostility to the perceived sources of this anxiety – imports, outsiders, free trade agreements, and even international organizations and multinational corporations.

A measure of this anxiety – the cross between immobility and exposure – is then necessary to test this theory. To do this, we start with an individual's occupation. The US Department of Labor categorizes all occupations as a combination of tasks. Some jobs are more routine, or require the use of specialized tools than do others. Two occupations that are similar to each other in terms of the tasks they require may be easier to move between, while those that are dissimilar pose greater barriers to transition.

Yet the similarity of jobs alone does not mean that an individual can seamlessly move between them – there might not be too many similar jobs available in one's industry or one's state, so we adjust our measure of similarity with factors to account for availability. By combining these measures of the ease of transition with the availability of similar jobs, we capture the degree to which an individual in an industry in a state perceives their labor market mobility.

Importantly, immobility by itself is insufficient to induce anxiety. Consider a highly skilled neurosurgeon in a small city hospital, for example. While the availability of similar jobs may be scarce, demand for her job is high. Hence, the scarcity of similar jobs is an expression of that worker's monopoly power, and not a source of anxiety. A crucial missing factor is the degree to which an individual's current job is demanded by her labor market.

Accordingly, we also ask individuals about their industry of employment. If that industry has suffered from Chinese imports in the period prior to their being surveyed, we say that individual has experienced a "shock" to the demand for her job. Here again, not all workers who are exposed to

international competition from Chinese imports suffer equally. Those whose skills are transferable to other occupations located nearby are unlikely to experience a similar anxiety, and their politically relevant beliefs are less likely to move in kind. The interaction of these factors (occupational immobility and exposure to a globalization shock) provide a strong basis for the expression of opinions opposed to trade and immigration, but none are, on their own, sufficient.

We collect survey responses from roughly 37,000 individuals – we know their jobs and their locations, as well as their answers to a battery of questions about their attitudes towards their economic well-being, international trade, immigration and international organizations, between 1993 and 2018.

Using these data, we construct individual-specific measures of labor market immobility based on the O*NET database of occupational tasks, combined with Census data on occupational prevalence by industry and geography. We interact this measure with an industry-based measure of exposure to Chinese import competition to test whether labor market anxiety is a crucial missing piece of the puzzle. The results are striking, and are displayed below in the left panel of Figure 1. The vertical axis measures the marginal effect of exposure to Chinese import competition to an individual's protectionist sentiments, across different measures of the individual's labor market immobility (horizontal axis). We can see that at low levels of immobility, there is almost no change in the individual's protectionist sentiment (the estimate is close to zero). But when immobility gets higher, the effect of the shock is to significantly increase an individual's protectionist sentiment. Consistent with our expectations, neither labor market immobility nor import competition is, by itself, able to explain patterns in protectionist views. But when we combine them, we isolate those who experience the most anxiety from globalization, and find that they hold the most negative views toward free trade.

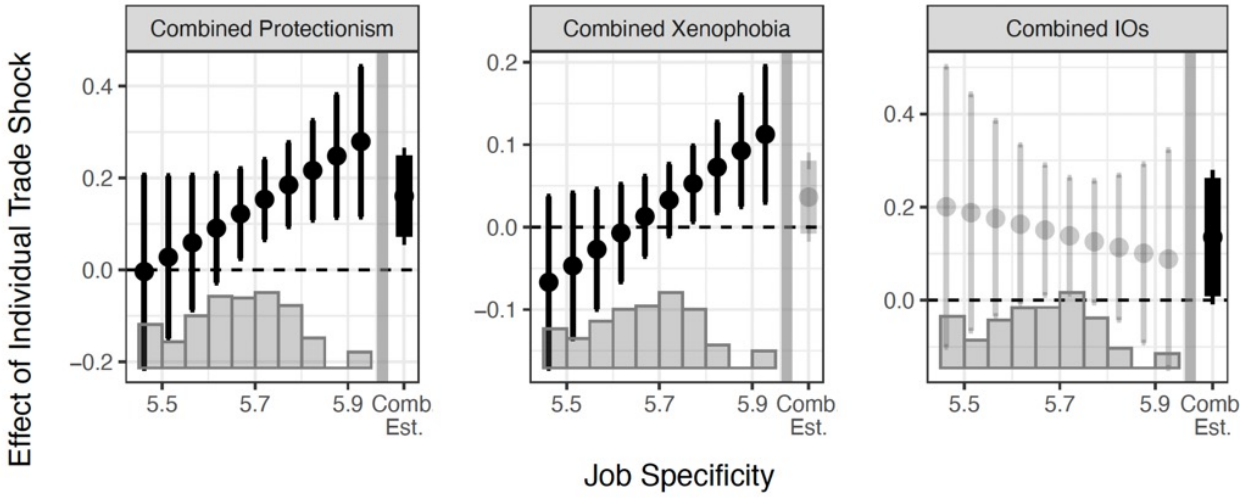


Figure 1: Estimated effects on attitudes toward globalization

A very similar finding is evident in the middle panel of Figure 1 – here the questions about foreigners and outsiders are aggregated to estimate a combined xenophobia measure. Once again, the higher is the immobility, the greater is the effect of the import shock on xenophobic sentiments. It is interesting to notice (in the right-hand panel of Figure 1) that we don't find any effect on anti-international organization sentiment of either the shock or immobility or the combination.

We unpack the responses somewhat. When it comes to trade, respondents with greater occupational immobility are more likely to indicate that the jobs gained from free trade are worse than their current job, and those that are lost due to free trade are better.

Our findings also reveal that the backlash against globalization is also entwined with baser beliefs about identity, citizenship, and culture. Those who are hurt by globalization hold more nativist views, ranging from the qualities that define an American citizen to the anxiety that foreigners erode American culture.

These results highlight the winners and losers under free trade. Whether these individuals (the immobile and exposed) are the pivotal voters in swing districts remains an open question; we do offer a potential mechanism that links exposure to trade and observed political support for anti-globalist candidates at the district level.

5

Human Security and Attitudes toward Globalization: Evidence from Sub-Saharan Africa

Sarah M. Brooks and Soohyun Cho

Canonical models of trade (Heckscher-Ohlin, Stolper-Samuelson) predict that developing countries, being relatively abundant in low-skilled labor, should demonstrate stronger popular support for free trade compared to the richer, capital abundant nations. These predictions have been largely confirmed, as globalization and trade liberalization have met with broad support in emerging and developing democracies, whilst the advanced industrial nations are said to be experiencing a globalization backlash (Figure 1, Figure 2). It is perhaps for that reason that scholarly research on the globalization backlash has largely overlooked the vast majority of the world residing outside of the advanced industrial nations (See however, Dolan and Milner 2019; Mansfield, Milner and Rudra 2021; Rudra, Nooruddin and Bonifai 2021)

Our research seeks to dig deeper into this question, and to complicate this portrayal of the globalization backlash in two ways: First, we argue that the dichotomy of developed versus developing countries overlooks important and instructive variation within the developing world, and specifically between the middle-income emerging democracies and the poorest developing nations. Second, we highlight the distinction between attitudes toward the open movement of goods (trade) and humans (migration) across borders, as we argue that the heterogeneity in globalization backlash across middle income and developing countries can be clearly observed. We lay out a research agenda to explore this puzzle, and offer an explanation for these differences in anti-globalization attitudes within and across countries.

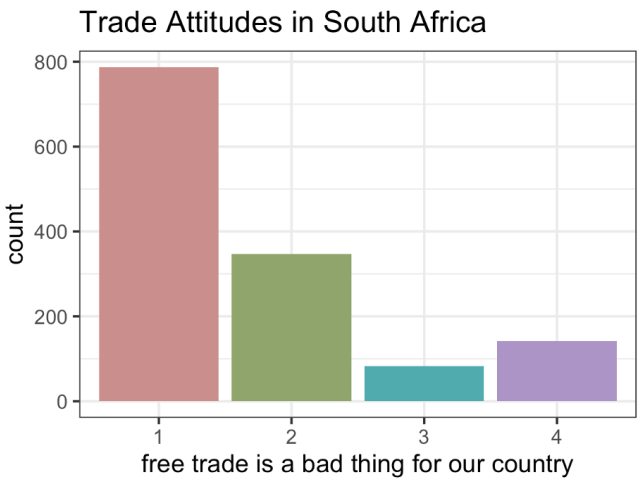


Figure 1: Attitudes toward Globalization in South Africa

Without a doubt, the literature on the 'globalization backlash' has focused overwhelmingly on the advanced industrial nations. Being abundant in capital but scarce in low-skilled labor, the consequence of trade liberalization for these nations has been widening inequality; returns to capital have surged, while the semi- and low-skilled workers have been 'left behind' by manufacturing competition for lower-wage economies. Those low-skilled workers in the advanced industrial democracies, this research shows, have become the core constituents of the globalization backlash (Agnolin, Colantone and Stanig N.d.; Baccini and Weymouth 2021; Broz, Frieden and Weymouth 2021; Clark, Pinto and Tanabe N.d.; Colantone and Stanig 2018a; Margalit 2019; Pastor and Veronesi 2021).

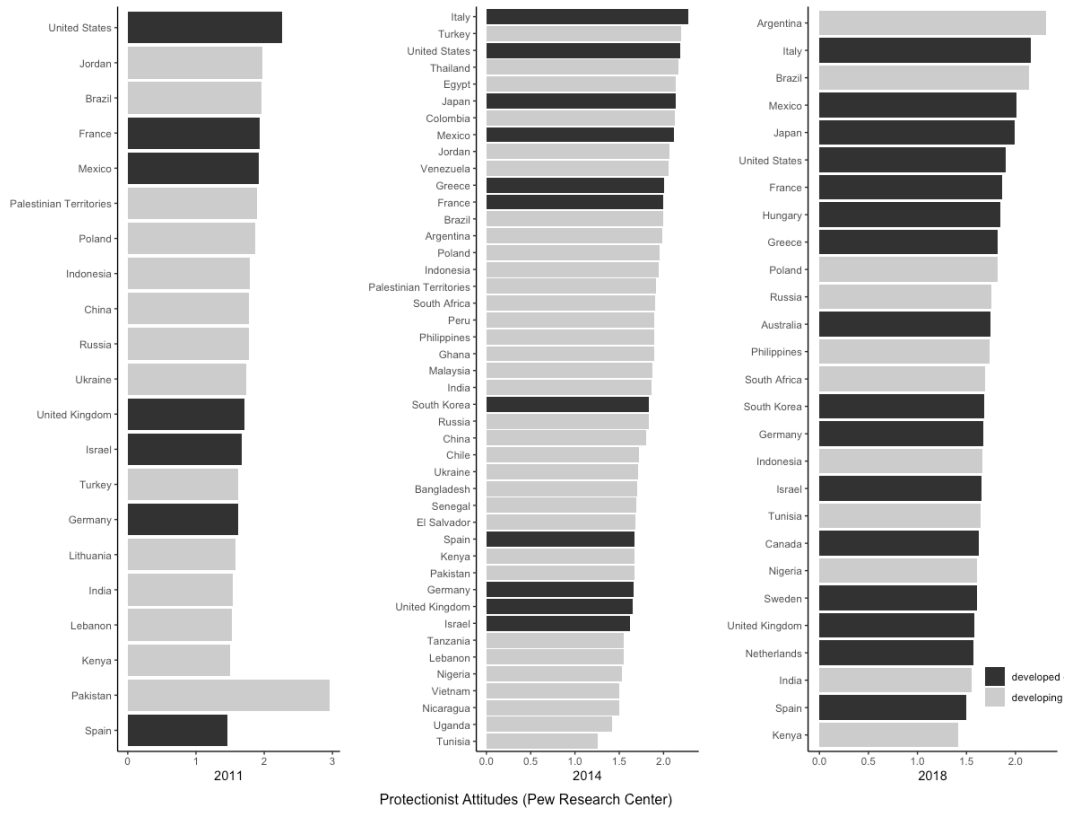


Figure 2: Attitudes toward Globalization: Developed and Developing Countries

Figure 3: Globalization Backlash in African Countries, AfroBarometer Round 6 (2018)

This picture becomes less clear, or consistent with macro-level trade theories, however, if we move beyond the developing/developed dichotomy and examine differences in relative skill levels within and across developing countries. Specifically, when we examine the heterogeneity among middle-income emerging market economies and lower-income developing countries, and disaggregate attitudes toward the flow of goods and people across borders, the picture is more complex (Figure 3). Indeed, looking more closely at these middle-income and developing countries, the notion of the "globalization backlash" becomes more complex than the canonical models of trade and globalization would predict. Specifically, we see a stronger resistance to migration in the middle income countries, alongside favorable openness to trade, although in the poorer countries of the developing world, the free movement of trade and people across borders remains popular.

Whereas scholars have viewed economic nationalism, protectionism and anti-immigrant sentiments as part of a common response to cultural or economic threat in advanced nations, we demonstrate that anti-immigrant attitudes do not consistently track trade protectionism in middle-income countries. We explain this divergence by arguing that different dimensions of human security underpin attitudes toward migration and trade openness through their effects on the salience of gender, class, ethnic or national identity.

The case of South Africa offers an ideal opportunity to explore these puzzles, and it is relatively abundant in unskilled labor and relatively scarce in capital compared to the advanced industrial nations. However, within Sub-Saharan Africa, South Africa is relatively capital abundant, and is a net importer of low-skilled labor from its poorer neighbors, and an exporter of capital goods to the Continent. Our argument therefore begins from the observation that trade liberalization has in general been popular in the middle income and developing countries, but that this does not tell the entire story of how globalization is perceived and received in emerging and developing democracies.

We argue that it is critical to distinguish the experience of the middle-income countries, which experienced a 'China shock' of their own, with widening inequality and manufacturing job losses; volatile exposure to capital flows, structural adjustment and anti-IO sentiment resulting from the decades of structural adjustment plans under the IMF and World Bank. Even as insecurity and vulnerability to job loss and poverty expanded, any large-scale anti-trade 'backlash' was tempered by the 2000s commodity boom, and the attendant adoption of anti-poverty cash transfers for the poorest in Latin America, Sub-Saharan Africa.

The end of the commodity super-cycle, thus has given way to a new rise in populism and nationalism; it also has elevated the salience of globalization for middle-income countries. It is in this space that we bring our attention to the distinctive globalization backlash that we identify in the emerging, middle-income democracies. We argue that, by contrast to a dominant literature See however, Agnolin, Colantone and Stanig N.d.; Gidron and Hall 2017, 2020, economic and psychological explanations need not be set in opposition to each other, as insecurity may trigger an array of psychological dispositions that include nationalism, status threat, and thus hostility to foreigners, as manifest in protectionist and anti-immigration sentiments, inter alia. Indeed, we argue that a crucial component of the "globalization backlash" is insecurity, and its effect on social identity, authoritarian dispositions.

We test this argument through a comparative analysis of two countries in Sub-Saharan Africa: South Africa and Zimbabwe. Compared to the advanced industrial nations, South Africa is relatively abundant in labor, but capital scarce; within Sub-Saharan Africa, however, South Africa is relatively capital abundant and is a net importer low-skilled labor from its poorer neighbors (such as Zimbabwe). By contrast, Zimbabwe is a net exporter of labor to South Africa and importer of manufactured goods from its neighbor.

This research design offers us the opportunity to test our argument that a crucial component of the globalization backlash is insecurity, and its effect on social identity and authoritarian dispositions (Shayo 2009, 2020; Tajfel and Turner 1979). Insecurity experienced in the labor market can make certain social identities more salient (Ballard-Rosa, Jensen and Scheve 2022; Brooks, Ulriksen and Macaskill 2019; Cho N.d.) and thus we expect that insecurity-rooted in the context of fraying or inadequate safety nets and exposure to cross-border imports of goods and labor, to activate national identity, ethnocentrism, and authoritarian values in South Africa's lower-skilled population. We investigate this puzzle through original survey research and experiments to identify the nature and causal factors behind pro/antiglobalization attitudes in Sub-Saharan Africa.

6

The Gendered Political Consequences of Industrial Decline

Richard Clark, Roza Khoban and Noah Zucker

Declining industries in Western economies, such as coal and steel, do not draw their workers evenly from surrounding communities. Indeed, workers in these industries are often disproportionately white, with important implications for electoral outcomes. Such workers are also overwhelmingly *male*. In the United States, for example, more than ninety percent of all coal miners are men, and the makeup of struggling manufacturing industries is similarly skewed. Female job growth has rapidly outpaced male job growth in much of the country, as the map below illustrates. Yet the political effects of decline in such gender-imbalanced industries, and of labor market shifts from men to women, are largely unknown.

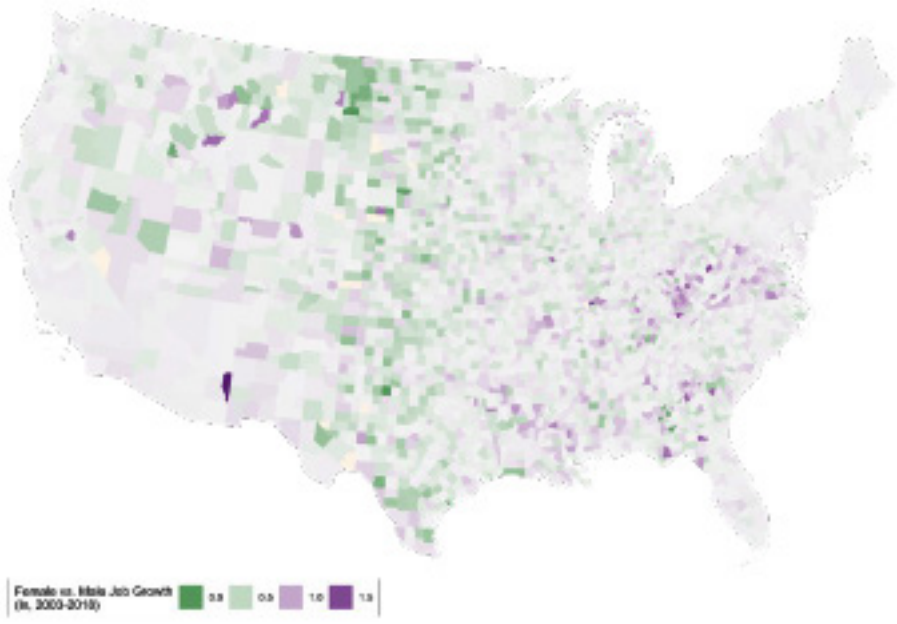


Figure: This figure illustrates the growth in female employment between 2003 and 2018, divided by the growth in male employment over the same period, across counties in the United States. A higher value (purple-colored counties) indicates that female employment grew faster, or declined more slowly, than male employment. A lower value (green-colored counties) means that male employment grew relatively faster compared to female employment. Calculations are based on data from the Quarterly Workforce Indicators.

In new work, we explore how decline in predominantly male industries affects voters' political attitudes and election outcomes. We argue that these shifts have fueled the far-right populist movements that have recently taken hold in many Western democracies, exemplified by Donald Trump's takeover of the Republican Party and the success of Brexit campaigners. We contend that the widespread loss of male jobs drives both men *and* women to endorse right-wing populist candidates for elected office.

When disproportionately male industries decline, breadwinning responsibilities within households will often tilt towards women, vesting them with greater economic autonomy and higher social status. Laid-off men who remain unemployed or move to other industries, especially those offering less pay, may simultaneously experience a loss of domestic social status. Men may then feel lesser or left behind relative to women or those in growth industries. This should push many men to support "nostalgic" political candidates advocating for the revitalization of "masculine" industries and a return to patriarchal family structures, two goals often articulated by right-wing populists.

Women too may increasingly support such right-wing candidates out of frustration with their families' loss of income or in sympathy with their spouses. Women should be especially likely to move to the right in areas where culturally conservative institutions, such as evangelical Christian congregations, endure throughout a bout of economic turmoil. While women's economic empowerment has been associated with an erosion of patriarchy elsewhere, these traditionalist institutions break this link between female economic autonomy and political equity. Rather than unemployed men taking on additional domestic responsibilities to lessen the burden placed on their partners, women in such areas may be left to serve as both breadwinners and primary homekeepers. Women may then support right-wing candidates who promise to reduce their workload by restoring their husbands' economic positions. Or, women pulling double duty between domestic work and breadwinning may simply find less time to participate in politics as a result of the demands placed on them — exacerbating the time constraints on political participation known to disproportionately affect women.

We test this theory with data on industrial decline, the gender composition of industry workforces, and the strength of evangelical Christian movements across different regions in the United States. By using unique household- and individual-level data, we track within-household changes in relative income and status over many years. Examining the same individuals over time enables us to study our particular theoretical mechanism by isolating the impact of our key variables — male job loss and changes in the household division of labor — on political attitudes and behavior.

We find that when men disproportionately lose jobs, both men and women become likelier to support far-right candidates and were especially likely to vote for Donald Trump in 2016. We also find that this relationship is stronger in cases where women displace men in the workforce and locales with higher rates of evangelicalism. These results illustrate how industries' gender compositions powerfully shape the political consequences of economic decline.

This work should inform how policymakers look to manage economic dislocations. Efforts to ease the impact of globalization on affected communities, such as those in the U.S. Rust Belt, ought to consider the gender composition of declining industries and the role of conservative cultural institutions in fomenting populist attitudes. Though men disproportionately suffer job losses as a result of deindustrialization, women often pick up the slack both economically and emotionally while retaining the vast majority of household responsibilities. Policymakers should then seek not just to retrain men and return them to work, but to ease the burden placed on women.

One solution is to bolster public education and make affordable childcare more available, such as by offering universal pre-kindergarten, as New York state is working towards, or daycare subsidies, prominent in Nordic countries. Individuals may be more open to this targeted spending than more general cash welfare programs. It is also essential that policymakers work to narrow the gender pay gap. Women are often paid far less than the men they replace in the workforce, exacerbating the disruption caused by decline in male-majority industries. Lastly, policymakers should consider the importance of local cultural institutions and look to accommodate such institutions. This means, for instance, understanding that there may be an aversion to cash welfare in certain settings, or that deindustrialization has important implications for male and female social status.

7

The Perils of Privilege: Manufacturing Wages, Educational Attainment, and the Populist Response to Industrial Decline

William Roberts Clark, Pablo Pinto and Keigo Tanabe

The American political economy experienced tectonic shifts in the last few decades. Unlike populations in other advanced industrial countries, mortality rates for non-Hispanic Whites in the US stopped declining in the late 1990s. There has been an epidemic of mortality related to drugs, alcohol, and suicide, and these are "deaths of despair." There also has been a large increase in income inequality. At the same time, electoral support for the Democratic party has been steadily declining among union voters since the 1970's - especially in the South. White working class males appear to be increasingly responsive to xenophobic, racist, and sexist narratives offered by media pundits and extremist candidates.

We argue that all these developments can be traced, in part, to a single phenomenon, which when combined with declining employment in manufacturing, constitutes an under appreciated source of right wing populism in the United States: discriminatory hiring policies in the middle of the last century.

Our argument begins with an observation: there was a sizable wage premium in the manufacturing sector in the United States beginning in the middle of the twentieth century. This rise in manufacturing wages was sustained by hiring practices that restricted access for women, people of color, and immigrants to high wage jobs that did not require a college education. As a result of privileged access to high paying jobs that required little education, white men, *ceteris paribus*, had a lower college wage premium than white women and both men and women of color. When, decades later, declines in manufacturing jobs due to import competition, automation, and off-shoring led to stagnating wages and high levels of unemployment for workers without a college education, there was a set of (white male) voters ready to be mobilized in support of right-wing populist appeals.

It is important for our argument to establish that discriminatory practices took place and were extensive and intensive enough to shrink the college wage premium for white male workers. There is plenty of evidence of discrimination against women and persons of color in hiring practices in the post-World War II period. It is more explicit in some places, sectors, and times than others, but there is little question that such discrimination was widespread and that, as Paul Frymer argues, it was only with the Civil Rights Act of 1964 that the federal government became involved in any consistent manner in limiting such offenses.

In the first half of the 20th century, members of each year's birth cohort were more likely than the preceding cohort to earn a Bachelor's degree by the time they were 35 years old. However, for those born between 1950 and 1960, male college graduation rates declined and female graduation rates were stagnant. We use information from the Census Bureau's Current Population Survey to show that the decline in male graduation rates was entirely a white male phenomenon. When we divide the sample by race as well as sex, we see that only

white males experienced a decline in college graduation rates while the graduation rates of others resumed their upward trend by 1960; by the 1970s, these groups had graduation rates exceeding those of white men.

We also present evidence that high manufacturing wages discouraged white men, but not others, from obtaining college degrees. White men living in counties with high manufacturing wages had a *decreased* propensity to earn Bachelor's degrees, while others in similar circumstances had an *increased* propensity to earn Bachelor's degrees. In sum, the evidence suggests that an increase in manufacturing wages raises the opportunity cost of a college education, but only for white males. This is consistent with our argument that individuals who are not white males did not have an equal opportunity to earn high wages in the manufacturing sector.

White males' privileged access to high paying jobs in the middle of the last century led them to invest less in their human capital development. In effect, the existence of widespread racial prejudice in hiring practices perturbed the informational signals individuals received about expected returns on educational investments. When subsequent changes to the economy (and to hiring practices) occurred, it left those with less education in difficult positions. Coupled with a decline in the demand for relatively low-skilled manufacturing jobs, the reduced propensity for white men to go to college had wide ranging effects. These consequences included declining life expectancy, increased drug and alcohol addiction, suicide, and an increased propensity to identify with white nationalist identity as well as to vote for right-wing populist political candidates.

Consistent with these expectations, we present evidence that individuals living in counties experiencing more manufacturing job loss in the first decade of this century had an increased propensity to vote for Donald Trump in 2016. The link between job loss and the vote for Trump was twice as strong if the individual in question did not hold a Bachelor's degree. Educational attainment matters at the community level as well: manufacturing job losses were associated with an *increased* propensity to vote for Trump in counties where few held Bachelor's degrees, but a *decreased* propensity to vote for Trump in counties where many did.

To summarize, educational decisions with consequences for the 2016 election had roots in practices taking place decades earlier. From the 1950 birth cohort, white men began going to college less frequently. This reduced enrollment in college is explained, in part, by the post-World War II abundance of high paying jobs not requiring a college education. The privileged access that discriminatory hiring practices afforded was one of the reasons why the availability of such jobs affected white men's educational investment decisions more deleteriously than white women and both men and women of color.

8

How South-South Migration Affects Welfare State Politics

Nikhar Gaikwad, Kolby Hanson, and Aliz Tóth

Scholarly work on the political impacts of migration has largely focused attention on receiving communities in advanced industrialized economies, both by analyzing political responses to migrants and social reactions to their presence. However, we know comparatively little about how migration impacts the economic outlooks, political behavior, and policy preferences of migrants and those in sending communities. Sending community effects are particularly important because migration is increasingly dominated by labor movement flows between countries in the Global South, with labor migrants typically maintaining citizenship and social ties to their home countries and returning home after employment stints overseas.

In 2017, more international migrants from developing countries had resettled in other developing regions than in industrialized nations; migration within Asia and the Middle East now comprises the largest regional migration corridor in the world (United Nations 2017, 1-3). South-South remittances equaled $207 billion, just short of the $224 billion remitted from industrialized economies to developing, in 2013 (World Bank 2013, 11). Developing country policymakers actively promote emigration to open economic prospects for individuals excluded from domestic markets.

How does migration shape the political preferences of those who may gain economically from it and, in turn, sculpt welfare state politics in sending regions? A vast body of literature across the social sciences has examined how exposure to the global economy shapes support for taxation and redistribution, with some arguing that globalization creates pressures for an expanded welfare state and others claiming just the opposite (Cameron 1978; Margalit 2011; Rodrik 1998; Linardi and Rudra 2020; Rudra 2008; Adida and Girod 2011; Acevedo 2020). Missing in this debate are analyses of how migration shapes the political preferences of those who move across national borders.

A Randomized Controlled Trial on South-South Migration. To study how migration shapes political preferences, we designed an experiment that facilitated the placement of individuals from India in hospitality sector jobs in Gulf Cooperation Council (GCC) countries (Gaikwad, Hanson, and Tóth 2022a; Gaikwad, Hanson, and Tóth 2022b). The location of the study was Mizoram, a geographically-isolated state in India with low levels of outmigration. Working with the state government and a local NGO, we recruited 392 relatively young, well-educated, but under-employed individuals seeking GCC employment. Half of the recruits (196 individuals) were randomly chosen to receive a free training program that combined basic hospitality job training with recruitment for overseas jobs. Random selection into the program enables clean, causal identification of the impact of overseas migration because the group that was selected for the intervention and the one that was not are on average similar on a host of characteristics, both observable (age, education, employment, etc.) and not.

During the course of the program, selected participants had the chance to attend classroom and practical training related to restaurant service, food and beverage preparation, and housekeeping as well as coaching on resume preparation and interviewing. At the end of the program, participants were invited to interview with vetted overseas employers (Pizza Hut, Costa Coffee, Mandarin Oriental, etc.). If they were successful in securing a job, participants also received assistance with immigration paperwork. The costs of visas and airfares were covered by the employer.

We measured various attitudes and outcomes through three sets of surveys: baseline (before selection into the program), midline (after program completion, before recruitment for overseas jobs), and endline (after migration). These surveys were conducted over the phone, with the exception of the in-person baseline survey, and included questions on migration status, employment, wages, and preferences regarding government policies.

The intervention resulted in a sharp increase in overseas migration. Subjects in the treatment group were 20 percentage points more likely to migrate than those in the control group. The opportunity to migrate, in turn, significantly affected both the economic standing and the political preferences of Mizo subjects in the program.

On the economic side, the opportunity to move overseas had a dramatic effect on the economic position of program participants. Two years after the program began, individuals in the treatment group overall were earning more than double the wages of those in the control group (see Figure 1). These gains, moreover, came from the small minority who ended up migrating for work. Only one in four treatment individuals (23%) took jobs in the Gulf Region, but those individuals were earning more than 40,000 INR (USD 540) per month, approximately triple the average income of those who stayed back in Mizoram. The migrants in our study, moreover, sent nearly half of their earnings home to family, significantly boosting family incomes and household resources.

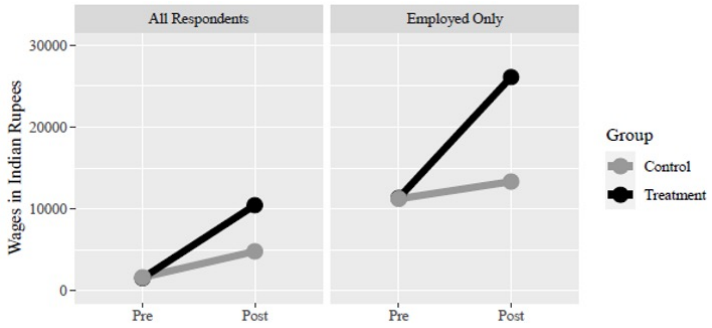


Figure 1: Baseline and Endline Wages in the Control and Treatment Groups

Meanwhile, those who received the opportunity to migrate and earn these higher incomes became significantly less supportive of state-led taxation and redistribution. Those who received the opportunity to move abroad were nearly ten percentage points more likely to say that the government should not focus on reducing income differences, that the government should not raise taxes to fund social programs, and that poor people can work their way out of poverty without the government. Even more surprisingly, migrants largely changed their views before they took jobs or moved abroad, and even those who were unlikely to migrate shifted their views after being selected for the program. These findings suggest that the economic "exit option" of migration, by strengthening bargaining power vis-a-vis domestic employers, can shift political views even if individuals eventually choose not to migrate.

Implications. Labor migration, in other words, appears to transform the economic and political lives of those in low-income communities in two somewhat contradictory ways.

On one hand, labor migration can be an immense source of economic gains for low-income communities in the Global South. Labor migration provides lucrative economic opportunities for those with few options in the domestic economy, allowing young people to earn higher incomes overseas or to parlay their exit option into higher wages and better treatment at home. These benefits may be particularly valuable to members of marginalized groups like the Mizos (a Scheduled Tribe community in India) in our study, for whom migration offers an escape from the discrimination and labor market constraints in the domestic economy. This also means that migration opportunities can serve as a highly-cost effective development program. Our program spent approximately $200 per program participant, but generated more than $900 per year in wages, even when it is averaged across the many who did not end up migrating.

On the other hand, these economic opportunities may undercut support for the welfare state that provides economic security to these same low-income communities. Importantly, changes in political preferences do not just affect migrants, but the much larger pool of potential migrants who have not yet, and may never, move overseas for work. Therefore, our study illustrates how migration in the global economy plays a complex role in reshaping welfare state politics in sending regions in developing countries.

Like other types of globalization, such as trade and foreign direct investment, migration can reap considerable material welfare gains for migrants and their communities. Yet as our study documents with clear experimental evidence, globalization undercuts support for the welfare state among its economic winners, a finding that is in line with Linardi and Rudra (2020) and goes contrary to seminal work in the domain of international trade (Cameron 1978; Rodrik 1998). Our study therefore contributes to a body of evidence showing that an unintended consequence of policies promoting greater global integration is rising inequality in the wake of a shrinking welfare state.

9

Deep Roots: On the Persistence of American Populism

Ze Han, Helen V. Milner and Kris James Mitchener

Does American populism persist? In dialogue with the literature on populism and historical persistence, this report argues that contemporary American populism has deep roots. Using votes for the People's Party in US Congressional House elections from the 1890s, we show that counties experiencing support for populism in the late-19th century predict support for Donald Trump in 2016 and 2020. Our analysis offers a new historical account of contemporary American populism and shows that historical causes can have persistent effects.

The argument in brief. Our research asks two questions: does the geography of populism in the US in the 1890s have any relationship to populism in the US today? That is, are areas in the US that supported populism 130 years ago still ones that support populism today? Second, can factors that may help explain populism today, such as globalization, explain the historical populism of the US in the 1890s? In this summary, we focus on the first question. Can we find a relationship between areas of strong support for populist candidates to the US House of Representatives in the 1890s and areas that supported Trump and evinced populist support in the 2010s? Does history matter? And in particular, does populism have historical persistence?

There is a large and long debate about what populism is. A common claim is that it is a political movement that appeals to and champions the common person and advances a set of beliefs that divide the world into two groups: elites who benefit from the current corrupt order and ordinary people who are morally superior (Mudde 2004, 2007; Müller 2016; Hawkins, Riding and Mudde 2012; Kaltwasser and Mudde 2018; Berman 2019). Leaders of such movements emphasize taking control from elites and passing it to the people so they can adopt policies that help the public. Blame for all sorts of economic, social, and political problems are laid at the feet of various elites, whose self-serving behavior, it is claimed, has enriched them and hurt the common person.

Populist movements are often known for their strong, charismatic leaders who claim to be outsiders and who attack all so-called elites and existing political structures. In doing so, they often show little regard for maintaining or strengthening democratic institutions and practices. Populist narratives also tend to blame foreigners and international influences for domestic problems, often preferring protectionism and isolationism to international engagement. But certainly, they tend to vaunt the nation and preach nationalism and ethnocentrism.

The US seems to have experienced various episodes of strong populist movements. The late-19th century was one and scholars often suggest that the Trump phenomena of the recent period is another (e.g., Betz 2013). Could these two be related? Could the regions that responded positively to populist appeals in the 1890s be similar today? There are at least two sets of reasons why this might be the case. One could be that these regions and the people within them are experiencing some of the same socioeconomic problems now as back then, leading them to support the same generic types of political "solutions." A prominent source of such problems might be globalization. Both pe-

riods are noted for being near the high points of exposure to the global economy and far-reaching transformations wrought by rapid technological change, also associated with globalization. Demand for populism thus might be high in these areas as they undergo disruptive changes due in part of global capitalism. A backlash against globalization may animate populist leaders and supporters. Second, economic and political shocks from earlier periods may create scars that persist in the institutions and attitudes that are passed on in these regions, once again leading to greater receptivity to populist appeals (Malmendier and Nagel 2011; Malmendier and Shen 2018). Our research is presently investigating these and other possible mechanisms.

Preliminary Empirical Results. To shed light on the research questions framed above, we present some preliminary empirical findings that examine the impact of historical populism on contemporary populist sentiment in the United States. Our measure of historical populism is county-level Congressional (House) vote shares of the People's Party (the national party of populists) measured for various election years between 1890 and 1898 assembled, and standardized by Clubb, Flanigan and Zingale (2006). We chose the House populist vote share as a proxy for historical populism because it offers a "cleaner" measure of populist support relative to, say, presidential vote shares calculated at the county level. That is, although presidential votes are available, William Jennings Bryan, a populist, ran for president as a Democrat in 1896 whereas congressional candidates ran as members of the People's Party. Because US counties have changed their boundaries across census years, we scaled House votes for the People's Party in the 1890s to 2010 counties using crosswalks in Eckert et al. (2020).

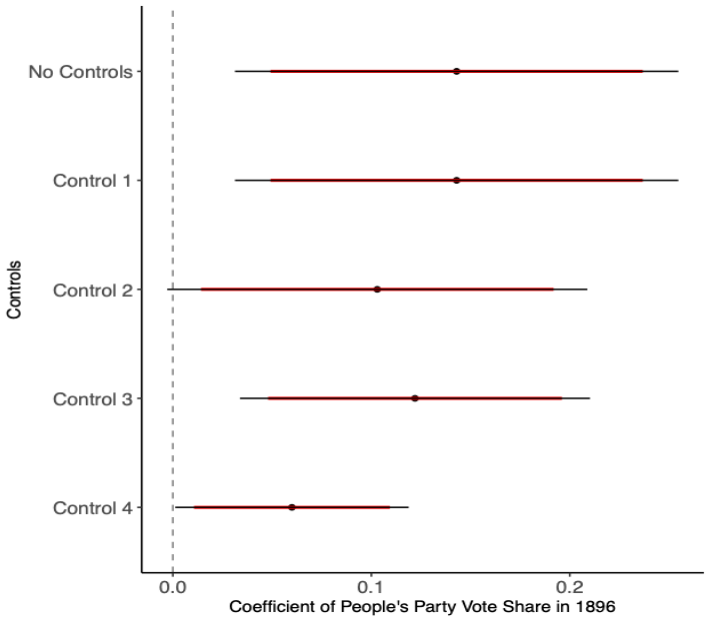


Figure 1 People's Party Vote Share in 1896 and Trump's Vote Share in 2016

Note: Figure 1 shows the coefficient of People's Party vote share in 1896 when adding different groups of control variables. The black and red bands display 95% and 90% confidence intervals, respectively. In Control 1, we added Chinese import penetration. In Control 2, we added Chinese import penetration and 2010 industry/occupation controls. In Control 3, we added Chinese import penetration, 2010 industry/occupation controls, and 2010 demography controls. In Control 4, we added Chinese import penetration, 2010 industry/occupation controls, 2010 demography controls, and state dummies.

Our estimating equation is

$$Trump_{c,t} = \alpha_s + \beta_1 PP_{c,189X} + \beta_2 Z'_{c,t} + e_{c,t}$$

where the dependent variable is Trump's vote share in county c in year t (either 2016 or 2020). We use Trump's vote share as a proxy for modern-day populist voting. While we suspect populism to be correlated with Trump vote shares, this is, of course, a simplification. Trump ran as a Republican and garnered votes from traditional Republicans as well as more populist-oriented voters. There is however a sizable correlation between voters with populist views and Trump supporters, as we explain below.

The main explanatory variable of interest is county vote shares for the People's Party in county c in the 1890s. The equation also includes control variables that may have also influenced presidential voting at the county level in 2016/2020. These include a measure of Chinese import penetration (calculated from the 1991 County Business Patterns data and UN Comtrade data), industry/occupation conditions, and demographic characteristics, either at the commuter zone (CZ) or county level (from the 2010 Census data). Specifically, Chinese import penetration was constructed following Dorn et al. (2020). Industry/occupation controls comprise the share of manufacturing and the share of agriculture in total employment. Demographic controls comprise the percentage of a county's population in nine age and four racial groups, as well as the population shares that are female, college-educated, foreign-born, Hispanic, and urban. We estimate OLS regressions, with some specifications including state fixed effects, to account for time-invariant state characteristics. Our regression analysis omits six states that were not extant in the 1890s (Utah – included since 1896), Oklahoma, New Mexico, Arizona, Alaska, and Hawaii).

For brevity, Figure 1 displays the results where the dependent variable corresponds to the 2016 presidential election and the People's Party's vote share is for 1896. We show several different regressions specifications of this relationship, starting only with the variable of interest and then adding additional control variables as we move from Control 1 to Control 4. The black and red bands show 95% and 90% confidence intervals, respectively. In all scenarios, the coefficient on the People's Party vote share in 1896 is positive and statistically significant at conventional levels. This suggests that counties with higher levels of populist voting in US House elections in 1896 also have higher levels of support for Trump in 2016. For example, in Control 4, a one-standard-deviation increase in People's Party vote share in 1896 raises Trump's vote share in 2016 by approximately 0.9%.

10

When Winners Turn against Markets: Globalization Backlash in Developing Economies

Aycan Katitas and Yunus Emre Orhan

A growing skepticism about the desirability of economic globalization, defined as the increasing economic ties between countries in terms of flows of capital, people, goods, and services, has taken center stage in the politics of the advanced economies. The Brexit, the election of Donald Trump, and the rise of European far-right parties have shown that populist politicians could achieve unexpected electoral successes by promising protectionist policies to voters who may support these candidates against their interests. A growing body of evidence suggests that opportunistic politicians flame a backlash against globalization for electoral gains, in contrast to the view that voters who oppose trade demand and elect protectionist politicians.

But what about developing economies? Existing research has investigated the determinants of support for economic integration almost exclusively in advanced economies, assuming that the theories derived from these contexts generally carry to developing countries. The impressive economic growth some previously crisis-ridden emerging countries, like China, Turkey, and Argentina, have achieved after liberalizing their markets through extensive reforms has motivated researchers to focus on developed countries. Yet, the assumption remains untested. Important emerging market players have been showing signs of skepticism toward global economic engagement. A Pew Research Center survey finds that less than 30% of the population in Russia, Mexico, Argentina, Colombia, and Turkey believe that international trade is beneficial. The survey also demonstrates that, on average, emerging market economies are less welcoming toward foreign investment than advanced economies. This is a cause for concern because developing countries hold vital positions in the global supply chain. Supply chain disruption, as we are currently experiencing due to COVID and the war between Ukraine and Russia, is a significant factor driving inflation and poverty worldwide. Since keeping the markets open to the world economy is a political decision, it is important to understand what factors may incite a developing country-driven backlash against globalization for the future of the liberal international order.

Our paper (*"Partisanship, Polarization, and Anti-Globalization Bias: Evidence from a Conjoint Experiment in Turkey"*) is a start to better understand to what extent politicians' expressed globalization policy positions resonate among developing countries' publics. On the one hand, we would expect less opposition to globalization from these voters because of the upward mobility opportunities economic integration has brought for low-income individuals. Indeed, the same Pew survey suggests that most developing country citizens support trade and foreign direct investment. After all, why would Chinese citizens resist globalization if China owes its impressive 7% economic growth to its manufacturing revolution? If Turkey's ruling party was able to hold onto power for 20 years mainly because of liberalization, why would the party officials demonize the foreign capital that made their supporters rich? On the other hand, populist politicians have the same incentives as their developed country counterparts to exploit globalization issues to flame xenophobic sentiments for public support. Due to immature party systems, high polarization, and precarious democracy, protectionist appeals may resonate even stronger among voters.

How will voters respond to politicians' anti-openness stances? To answer this question, we conducted a nationally-representative face-to-face survey in Turkey with 2,500 respondents in February and March 2022. Turkey is an important emerging market player that bridges the Western and the Eastern economies. The country has undergone extensive liberalization reforms since the 1980s. The ruling party, AKP, has achieved huge electoral successes after the administration's swift recovery from the 2001 financial crisis. The International Monetary Fund-enforced recovery package included further integration into the customs union with the European Union as well as the sale of state-owned companies to foreign investors. As the champions of liberal reforms, it is thus puzzling that AKP politicians have adopted protectionist rhetoric in recent years, especially when their constituencies have gained from economic openness.

	Candidate 1	Candidate 2
Age	52 years old	44 years old
Gender	Male	Female
Ethnicity	Turkish	Kurdish
Profession	Business Executive	Academics
Party	AKP	CHP
Positions	Will cut government spending in districts that did not vote for them	Served on a city committee that establishes the committee's schedule for each session
	Will facilitate the allocation of land to Middle Eastern investors who will establish factories.	Will make it difficult to allocate land to foreign investors who will buy Turkish companies.
	Will support the cultural activities of Syrians	Will cut financial aid to Syrian refugees.

Which candidate do you prefer? | o Candidate 1 | o Candidate 2 |

On a scale from 1 to 5, where 1 indicates that you would never support this candidate, and 7 indicates you would always support this candidate, where would you place CANDIDATE 1?

Never Support				Definitely Support
1	2	3	4	5
o	o	o	o	o

On a scale from 1 to 5, where 1 indicates that you would never support this candidate, and 7 indicates you would always support this candidate, where would you place CANDIDATE 2?

Never Support				Definitely Support
1	2	3	4	5
o	o	o	o	o

Embedded in the survey is an experiment where we ask respondents to choose from two hypothetical municipal candidates that randomly vary in their views on accommodating foreign investors in their districts and other characteristics. (We vary other traits as well: a candidate's age, gender, ethnicity, profession, party, democratic actions, and position on the refugee policy). A sample question is provided in Figure 1. Some candidates promised to facilitate foreign investment, whereas others promised to hinder it.

Do Turkish respondents prefer protectionist candidates over liberal ones? Figure 2 demonstrates that voters were three percentage points more likely to support a candidate who committed to impeding foreign investment compared to a candidate who promised to facilitate it. The finding suggests that Turkish voters cared enough about the foreign investment policy and preferred a protectionist candidate over a liberal one, even though it meant forgoing the prospect of jobs the new foreign establishment may bring.

Next, we looked at whether respondents' pre-experiment expressed sentiments about globalization matched how they judged the hypothetical candidates. The modal response to our question on whether globalization hurts the Turkish economy was "neither agree nor disagree," although respondents were slightly more protectionist than liberal overall. [The distributions of responses were: strongly agree (protectionist) 21%; agree 22%; neither agree or disagree 30%, disagree 14%; strongly disagree (liberal) 14%]. When we examined the choices of these voters separately, we found an interesting asymmetry. As shown in Figure 3, while the most protectionist voters rewarded protectionist candidates, the liberal voters' choices were disaffected by a candidate's foreign investment policy position. Looking at this graph, we also see that voters who did not have strong pre-existing opinions on globalization were more likely to support candidates offering protectionist policies over liberal ones. While more work needs to be done to unpack these results, they suggest that politicians can win over protectionist or neutral voters by promising protectionism but cannot count on support from liberal voters if they campaign on liberal policies.

Our results indicate that anti-globalization is a lucrative electoral strategy for developing country politicians, which echoes our findings in developed economies. This result may explain why politicians like Recep Tayyip Erdogan in Turkey, who championed liberal investment policies changed course and became protectionist during the election period in developed countries. Future research should investigate the heterogeneity in responses to protectionist rhetoric by studying the role of partisanship, polarization, and the local context to further our understanding of the politicization of protectionism in emerging markets.

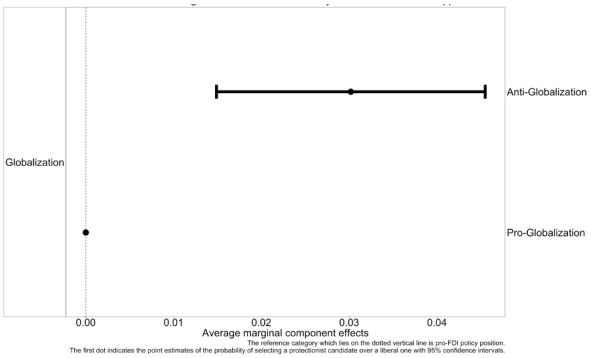


Figure 2: Protectionist FDI Policy Increases Candidate Support

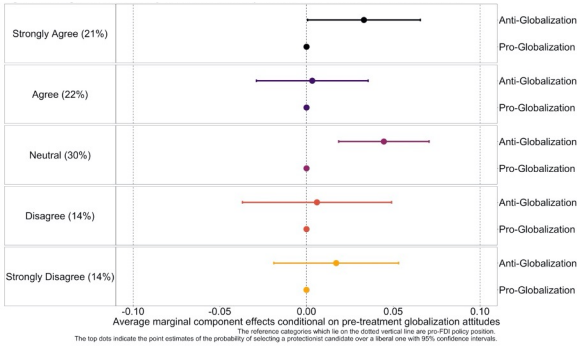


Figure 3: Foreign Investment Policy Position Matters Only For the Most Protectionist and Neutral Voters

11

The Myth of Accountability

Edward D. Mansfield and Diana C. Mutz

Considerable interest has been expressed in how the backlash against globalization contributed to the election of Donald Trump as president of the United States in 2016 and the referendum in the United Kingdom earlier that same year to leave the European Union (EU). In this study, we analyze how international trade and immigration—two of the most important and widely-studied features of globalization—influenced these outcomes. Trump campaigned on the dangers posed to Americans from immigrants and the need for the US to raise trade barriers and renegotiate or withdraw from various trade agreements. In the UK, control over national borders was a central issue in the Brexit campaign. Furthermore, various studies have found that areas of the US and the UK where industries and workers were hardest hit by relatively low-cost Chinese manufacturing imports voted to leave the EU and shifted their votes toward the Republican party in 2016.

We draw on two approaches to analyze the impact of globalization on these elections. Based on a political economy approach, we analyze whether citizens held politicians accountable at the ballot box for the impact that imports and immigration had on their lives or their communities. Using a behavioral approach, we examine whether individuals' opinions on trade and immigration influenced voting for Trump and Brexit.

Our findings offer little support for the political economy approach. One mechanism suggested by this approach for anticipating import shocks or immigration flows to influence voting is that people residing in areas harmed by imports or experiencing a large influx of immigrants become more anti-trade or anti-immigration as a result. This, in turn, prompts them to support anti-globalization candidates and policies. However, our findings reveal that, in both the US and the UK, import and immigration flows were virtually uncorrelated with opinions about trade and immigration within a given area. Another possibility that stems from this approach emphasizes retrospective economic voting: individuals living in areas adversely affected by imports or immigration will hold the incumbent party responsible and vote against the status quo. Yet our results are at odds with this claim as well. We find that people's opinions about trade and immigration had a much greater effect on vote choice in both countries than the actual flow of trade and immigration in their local areas. In fact, neither imports nor the flow of immigrants into their communities influenced voting for Trump or Brexit.

These results call into question the thesis of political accountability. Our evidence does not support the argument that voters in either the 2016 US presidential election or the Brexit referendum held leaders accountable for adverse effects that globalization had on their lives or communities.

In addition, based on representative national samples of England and the US, we find that these elections were not rooted in the same sentiments. Anti-immigration sentiment was highly predictive of voting to withdraw from the EU. But to the extent that trade preferences played a role in the referendum, individuals holding pro-trade views were *more* likely to vote to leave than those holding anti-trade views. The Leave campaign assured voters that exiting the EU would offer the UK greater opportunities to benefit from open foreign commerce and international trade agreements than remaining in the pact.

In the US, by contrast, trade played a somewhat greater role than immigration in encouraging voter defections from Barack Obama or a third-party candidate in 2012 to Trump in 2016. The Republican Party's position on trade changed radically when Trump became the nominee. Changes in

voters' assessments of the proximity of their positions on trade and immigration to the candidates' positions on these issues altered people's vote choice between 2012 and 2016. But the influence of these shifts was more pronounced among voters who found Trump's strongly anti-trade views appealing than among voters who subscribed to his anti-immigration position.

Globalization involves a wide variety of issues; mass opinion about different aspects of this phenomenon do not necessarily move in lock step. In 2016, it would not have been accurate to say that there was a backlash against trade in the UK, or that there was a backlash against immigration in the US. Our data reveal that the vast bulk of the British public supported trade during the period surrounding the referendum and that support for immigration in the US grew stronger from 2012 to 2016. Furthermore, scholars appear to have over-generalized the idea of a backlash in mass opinion to many globalization-related issues. Some observers assumed that what influenced voters to support Brexit in the UK was the same as what induced those who voted for Obama in 2012 to support Trump in 2016. Although such claims are appealing in their comprehensiveness, they do not fit the data well. Most importantly, our evidence seriously undercuts the idea that voters in the UK and US were simply holding political leadership accountable for the local impact of their policies on citizens.

12

American Opinion on Globalization: Origins of the "Backlash"

Diana C. Mutz

According to conventional wisdom, the negative impact of globalization on the American public has driven a widespread backlash involving public opposition to all things international. This backlash has been argued to encompass rising levels of trade opposition, increased resistance to immigration, opposition to US involvement in international organizations, and isolationism more generally. Further, the United States is said to be "by far the most important locus of this backlash against globalization" (Frieden 2018).

To date, however, little effort has been marshaled toward examining precisely what, if anything, has changed about the views of the American mass public on globalization-related issues. The idea of a generalized backlash against globalization gained prominence in 2016, specifically around the time of Donald Trump's Republican candidacy for president. Although previous third-party candidates such as Ross Perot had espoused strongly anti-trade views in previous elections, by 2016 being "anti-globalization" referred to a whole conglomeration of anti-internationalist positions.

Since the American public has been cast as a driving force in this turn against international involvement, it makes sense to examine the origins of these changes in the opinions of the mass public. I examine trend data from before Trump's election through the present in an attempt to locate the timing of this backlash across a range of foreign policy issues.

The notion of a backlash against globalization in the mass public suggests a fairly substantial change in the tides of public opinion, an over-time dynamic indicative of increasingly oppositional views, possibly toward a variety of different global issues. Unfortunately, few ongoing trends are available through parallel repeated studies, and there are even fewer opportunities to study how and why individuals change their minds through panel studies.

Many opt-in surveys do an excellent job of representing the US population on a handful of demographic variables. But because so little is known about what drives views on globalization, a probability sample has well-established advantages of representativeness on unknown as well as known factors. To maintain a high quality of evidence, I use representative national probability surveys that have been repeated over time to examine when and on which issues the American public has turned against globalization. These include surveys from the Chicago Council on Global Affairs, the National Opinion Research Center/Amerispeak at the University of Chicago, GfK International (formerly Knowledge Networks), and surveys from the American National Election Studies.

Have everyday Americans turned their backs on globalization? Overall, the results of these analyses are quite surprising. While the actual changes in American foreign policy under President Donald Trump certainly reflected a policy shift away from international engagement, I find little evidence that this was mirrored in, or was a response to, shifts in American public opinion.

In general, I find no evidence of a wave of anti-globalization sentiment in the US over the period from 2000 through the present. Even when limiting my focus strictly to validated voters or the highly politically involved, I find little support for this narrative. Instead, there is some evidence of

partisan polarization surrounding many issues, especially isolationism, trust in international organizations, immigration, and international trust. However, none of these indicators suggests a net decline in support for globalization.

Two additional patterns are noteworthy. First, the waxing and waning of support for international trade is exceptional in that these changes appear to be a function of whether people are members of the in-party or out-party with respect to the American presidency. Whichever party comes to power at the time increases its support for international trade. This pattern was especially surprising given Trump's strongly anti-trade rhetoric during his 2016 campaign. Nonetheless, Republicans increased substantially in their support for international trade during the Trump administration, long before Trump had introduced his own signature trade agreement.

A second general pattern worth noting is that to the extent that opinions on globalization have declined in support at all in recent decades, it happens long after Trump is elected, thus making anti-globalization opinions unlikely to be the driving force behind his electoral college victory. The only evidence I find of a decline in support for any globalization-related issue is the increasingly negative attitudes toward China found strictly among Republicans. However, as shown in Figure 1, these opinion shifts occurred only after COVID19 emerged in March of 2020.

Regardless of the lack of a trend in American mass opinion, the backlash against globalization is now a prominent narrative that has taken on a life of its own, not only in American politics, but world-wide. In a desire to construct a grand theory of everything, one that accounts for Brexit and Trump as well as nationalist uprisings in a number of other countries, American journalists, scholars and political observers appear to have constructed a false narrative about the role of American public opinion. This belief appears to have been driven by post-hoc efforts to explain these political phenomena. But the narrative is nonetheless influential in determining the kinds of policies that political leaders are willing to pursue.

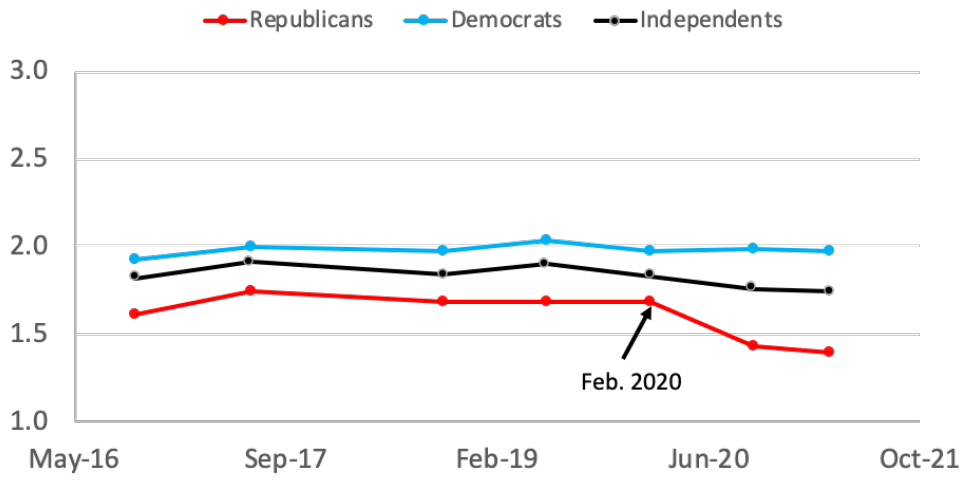


Figure 1. Support for China by Party Identification.

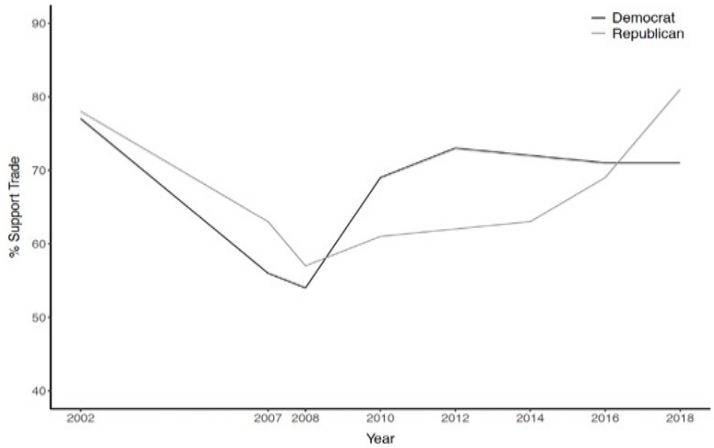
13

How Embedded Liberalism Failed: Stimulus Resentment and the Rise of Protectionism in the United States

Megumi Naoi

What explains the rise of trade protectionism and public opposition to free trade in Western democracies? The voluminous studies on the backlash against free trade that emerged after the 2016 election of Donald Trump converge on two key sources: (1) economic hardship and (2) status and cultural threats to American citizens' way of life (Autor et al. 2013; Dorn et al. 2020; Mutz 2018). Yet, when and where protectionist sentiment rose, as documented by public opinion surveys, is not consistent with the economic hardship and status threat explanations.

Figure 1 shows the average level of U.S. public support, sorted by partisanship, for free trade, as measured by Pew Global Attitudes surveys Historic partisan reversal occurred between 2008 and 2010. Republicans expressed lower support for free trade than the Democrats and this partisan reversal continued until 2016. This means that the election of Donald Trump was not the cause, but possibly was the result, of the rise of protectionist Republican voters. The timing of this reversal also challenges the conventional economic hardship explanations. The 2008-2009 Great Recession hit the U.S. economy hard with record high unemployment rates, but Democrats *increased* their support for free trade nearly 20 percentage points between 2008 and 2010. By contrast, Republican support for free trade did not recover to its pre-crisis height until a decade after the onset of Recession. Furthermore, the China import shock does not account for the partisan reversal. Imports from China peaked in the mid-2000s and declined during the Great Recession.



Source: Pew Global Attitudes Surveys, Spring waves from 2007 to 2018. A comparable survey instrument on free trade was missing from 2012 ans 2013 waves and thus are treated as missing.

Note: The dependent variable is % of respondents who chose "very good" or "somewhat good" to the question: *"What do you think about growing trade and business ties between **(survey country)** and other countries – do you think it is a very good thing, somewhat good, somewhat bad or a very bad thing for our country?*

Figure 1: Partisan Reversal in the United States – Protectionist Republicans, Free-trading Democrats

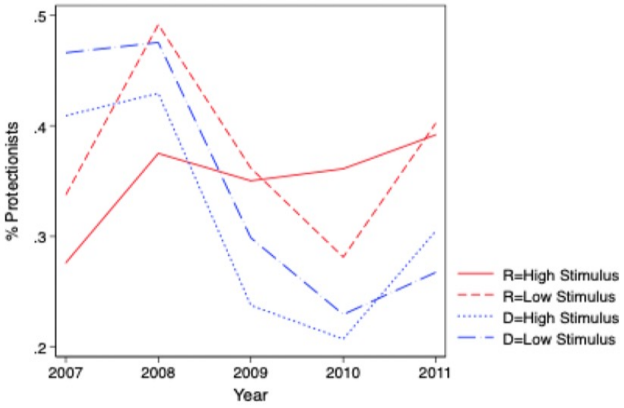
Disembedded Protectionism: Perceived Loser s from Stimulus Programs Support Protectionism. In contrast to the economic hardship and status threats explanations, I argue that the rise of protectionist sentiment among Republican voters is rooted in stimulus allocation during the Great Recession. I develop a theory of stimulus resentment, where the U.S. government's stimulus projects deployed during the Great Recession led Republican voters to increase support for a smaller government and higher barriers to trade. This support for a new policy mix, which I call "disembedded protectionism," operates through material grievances from the non-beneficiaries of government programs. The government allocation of stimulus-funded jobs paradoxically generated resentment that the stimulus measures benefited "them" but not "us" along the partisan line. This resentment led to an increase in distrust toward the government and heightened support for a smaller government among Republicans. Republican support for trade protection emerged as a substitute to fill the void of access to government-funded jobs.

Research Design, Data and Results. To test this argument, I collected six million project-level, geo-referenced stimulus allocation data under the Obama administration's American Recovery and Reinvestment Act (ARRA). I merge this project-level data on the geographic allocation of ARRA spending and ARRA-funded jobs across Congressional districts with nationally representative survey data before, during and after the stimulus deployment. The data allows me to disentangle material and non-material sources of stimulus resentment and protectionist trade attitudes.

The difference-in-differences estimates show that Republican voters perceived stimulus programs to be more ineffective in Congressional districts that received *more*, not less, ARRA spending and ARRA-funded jobs. In places where the arrival of more generous stimulus programs came hand in hand with credit-claiming information by the administration, Republican voters and racially white respondents developed a sense of distributive injustice – that the stimulus benefited "them" but not "us."

I then link stimulus resentment to American voters' trade attitudes. Using georeferenced, nationally representative Pew survey data on trade attitudes measured each year from 2007 to 2011, Figure 3 documents that protectionist sentiment dropped significantly at the height of the recession except among Republican respondents residing in high ARRA-receiving congressional districts (the spring wave of 2009). Between 2009 and 2010, when the majority of stimulus was disbursed and invoiced, Republican and Democratic respondents trend very similarly and protectionist sentiment fell in low-ARRA receiving districts (dashed red and blue lines). In contrast, in high-ARRA receiving districts, we see polarization between Republicans and Democrats. The difference between the proportion of protectionist Republicans and Democrats in 2009 is 11 points and widens to 15 points in 2010. The results suggest that stimulus deployment polarized trade attitudes along the partisan line in high ARRA receiving districts, but not in low ARRA-receiving districts.

The difference-in-differences estimation suggests that being a Republican in a high-ARRA receiving district is associated with a 30 percentage point increase in protectionist sentiment between 2009 and 2010, where the baseline level of protectionism (being a Democrat in low-ARRA receiving districts in 2009) is 15%. When we compare Republicans in high vs. low- ARRA receiving districts between 2009 and 2010, Republicans in high-ARRA receiving district express opposition to free trade at a level 15 points higher than Republicans in low-ARRA receiving districts. The results lend further support to the idea that stimulus resentment rose among Republicans through material and informational mechanisms. It is the *relative* material grievance of Republicans in high-ARRA receiving districts, who perceived that government-funded projects benefited others (such as Democrats and minorities), that led to stimulus resentment. Credit-claiming by Democrats that went hand in hand with ARRA-funded projects increased this resentment and rising support for protectionism among the Republicans.



Source: *Pew Global Attitudes Project*, Spring Waves, 2007-2011.

Figure 2: Rise of Protectionism among Republicans in High ARRA-recipient Districts

This evidence, however, is correlational and suffers from common endogeneity issues. I devise two identification strategies to address this threat, one that leverages variations in states' compliance with the Federal Highway Administration's order to install road signs for the ARRA-funded infrastructure projects (i.e., credit-claiming information) and a second that utilizes the allocation of ARRA-funded jobs in the renewable energy sector based on solar and wind-generation suitability factors (i.e., exogenous allocation of stimulus-funded jobs).

The results lend support to the causal effect of stimulus allocation on the rise of protectionism during the Great Recession. Conventional wisdom on the failure of embedded liberalism emphasizes scarcity of government programs to shield vulnerable workers in the United States (Autor et al. 2013) and backlash against welfare programs due to the racial coding of these programs (Gilens 1996; Alesina et al. 2004; Guisinger 2017). By contrast, my findings suggest that the failure runs deeper than resource scarcity. Embedded liberalism failed due to polarized responses to the government's expansive effort to address economic hardship. Support for trade protectionism emerged as a replacement for the (perceived) unfair distribution of occupational safety nets.

Note: this summarizes Chapter 8 of my book manuscript, Voting with the Wallet: Consumers, Income-earners and the New Politics of Globalization Backlash.

14

How the Populist Radical Right Drives Support for International Economic Integration

Nina Obermeier

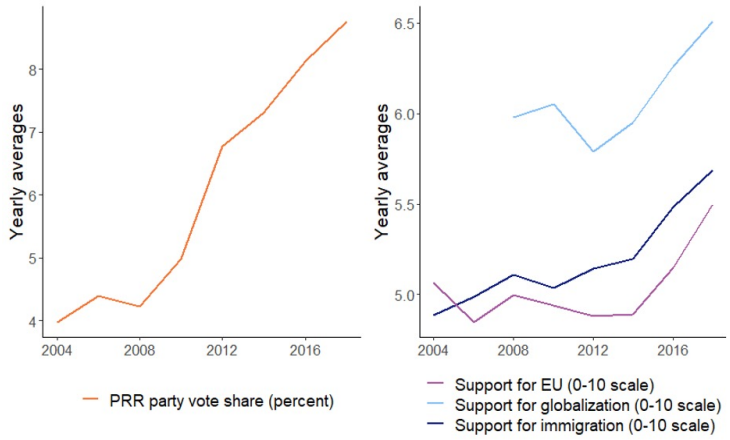
The 2022 French presidential election served as a powerful reminder of the strength of the populist radical right in Europe, with the *Rassemblement National*'s Marine Le Pen gaining 41% of the vote share in the second round. While Le Pen still lost to incumbent Emmanuel Macron, she was able to significantly improve on her result in 2017, when she won 34% of the vote. Her success forms part of a well-known trend in the vote share for populist radical right parties in Western Europe, which has risen dramatically since 2008 (as Figure 1 shows).

One of the most common explanations for this surge in support for the populist radical right is that it is driven by a backlash against globalization. As populist radical right parties in Europe frequently campaign on opposition to immigration and to the European Union (EU), their growing success is often attributed to rising anti-immigration sentiment and Euroskepticism among the public.

But is the public in Europe really becoming more anti-internationalist? Survey data suggests the opposite. As Figure 1 shows, public support for immigration, European integration, and globalization in key Western European countries has increased substantially over the last decade, well surpassing pre-2008 levels of support.

Why would support for these different forms of international economic integration be increasing at a time when anti-internationalist populist radical right parties are more popular than ever? My research on this issue shows that, paradoxically, public support for European integration and immigration is growing because of the populist radical right's increasing prominence across Western Europe.

In the last decade, populist radical right parties in Western Europe have made anti-internationalism their calling card, exploiting the problems of the euro crisis and the refugee crisis to undermine the legitimacy of mainstream parties. Previous research suggests that political entrepreneurs like populist radical right parties can benefit electorally



Source: Compiled by the author based on the ParlGov database (Döring and Manow 2021) and European Social Survey data.

Figure 1: Trends in average PRR party vote share and public opinion in ten Western European countries (Belgium, Finland, France, Germany, Ireland, the Netherlands, Portugal, Spain, Sweden, and the United Kingdom), 2004-2018.

from politicizing new or neglected issues like European integration (Wodak 2015). Focusing on anti-EU and anti-immigration rhetoric has therefore been strategically useful for these parties.

Making anti-internationalism a key part of the populist radical right's brand, however, also has unintended consequences. In particular, it means anti-internationalism is increasingly associated with the other key aspect of populist radical right parties: their extremist rhetoric. While some populist radical right parties in Europe, like France's *Rassemblement national*, have sought to moderate their image, they are still indelibly associated with right-wing extremism. Provocative statements – using racist slurs, calling for the "heterosexualization" of soccer, comparing Romani people to mice, and attacking a Holocaust memorial – are not uncommon among populist radical right politicians. In fact, research suggests that populist radical right parties purposefully use strategies of "calculated ambivalence" toward right-wing extremism in order to signal to their more extremist base (De Vries and Hobolt 2020).

This means that what populist radical right parties are best known for among the general public – besides their anti-internationalism – is their extremism. Inevitably, therefore, these two factors – anti-internationalism and right-wing extremism – become linked, both in public discourse and in the minds of the public.

In my research, I track this linking over time, using a corpus of newspaper articles about the EU from eight Western European countries between 2000 and 2019. I coded articles based on whether they linked Euroskepticism to right-wing extremism using supervised machine learning. These data show that Euroskepticism has become more tightly linked to right-wing extremism in media discourse in the last decade, but also that there is important variation across countries.

What are the implications of this linking of anti-internationalism with extremism? My research shows that when Euroskepticism is more closely linked to right-wing extremism, support for the EU increases among the public. This makes sense: the majority of the public is uncomfortable with right-wing extremism and therefore prefers not to take positions that are strongly associated with it. Once anti-internationalism becomes linked to extremism, then, many members of the public will become more supportive of international economic integration as a means of rejecting right-wing extremism. This in turn explains why public support for immigration, European integration, and globalization are increasing in Western Europe at the same time as populist radical right parties are becoming more prominent.

This phenomenon can be seen particularly clearly in the case of the murder of Jo Cox, a British member of parliament who was killed by a pro-Brexit white supremacist a week before the Brexit referendum in 2016. Her murder sent shockwaves across the UK. Media discourse almost immediately linked the murderer's anti-internationalism to his right-wing extremism and political violence. In my research, I use data from a British Election Study (BES) survey wave that was fielded at the time of the murder to estimate the effect of this change in discourse on attitudes toward international economic integration. My findings suggest that survey respondents' support for the EU and immigration – including their self-reported likelihood of voting Remain in the Brexit referendum – increased by approximately 4-7% in the wake of the murder.

What does this mean for the future of internationalism in Europe? While my research suggests the existence of a stabilizing mechanism that can help shore up support for international economic integration during difficult times, it also indicates that this mechanism is dependent on political discourse. In particular, if mainstream parties try to accommodate the populist radical right by mimicking their anti-internationalist positions, that could weaken the link between anti-internationalism and extremism in the minds of the public and thereby undermine support for international economic integration. In this way, how mainstream parties choose to engage with populist radical right parties may have important unintended consequences.

15

Political Cleavages and Exposure to the Global Financial Crisis

Ryan M. Weldzius, James Raymond Vreeland, and James H. Bisbee

Can a financial crisis tip the domestic balance of power between the status quo winners and the anti-establishment challengers? Political scientists have long speculated that an economic shock can reverse the political fortunes of actors in the political arena. We suspect that the 2008 global financial crisis (GFC) may have contributed to an anti-globalization backlash by increasing the relative political capital of firms that had been losing out from globally open economies.

Rogowski (1987) argued that adverse shocks to globalization negatively impacted the status quo winners from globalization more so than the losers. This reversal of financial fortunes largely explained, according to Rogowski, the political shifts experienced in the United States, Germany, and Latin America during the Great Depression of the 1930s. Can Rogowski's intuition help us explain the political shifts experienced in the United States after the GFC?

During a crisis, everyone may lose, but some lose more than others, allowing some groups to gain ground in relative terms. Indeed, by definition, those who are less exposed to the global economy should lose less when the global economy shrinks compared to those who are more exposed. And if relative financial gains translate into political gains, a fundamental realignment in political power can occur.

The shock from the 2008 Global Financial Crisis (GFC), the largest economic shock since the Great Depression, struck firms with greater sensitivity to the global economy more than it hurt firms insulated from the vagaries of international transactions (Claessens, Tong, and Wei 2012). After years of losing financial ground to globalized firms, these latter firms gained in relative terms.

But can these gains in financial power translate into political power? An assumption that was key – but untested – in Rogowski's work was the idea that "those who enjoy a sudden increase in (actual or potential) wealth and income will thereby be enabled to expand their political influence." Our paper tests this assumption by considering the political expenditures of firms following the GFC in the case of the United States.

Using firm-level data, we compare how those firms most and least exposed to the GFC changed their campaign contributions and lobbying expenditures after 2008. We rely on a rich dataset of over 14 million observations of firms over the 1990-2018 period. To measure a firm's exposure to the GFC, we utilize firm-level data on employment and sales from Reference USA and Compustat. We then use expansive observational data on firm-level campaign contributions from the Center for Responsive Politics and the Database on Ideology, Money in Politics, and Elections (DIME), as well as firm-level lobbying data from LobbyView.

We find that firms that lost most from the GFC reduced their financial involvement in politics more so than those firms that were relatively unaffected. We suspect that financial constraints caused by the GFC dramatically limited the political spending of exposed firms. We thus conclude that the GFC indeed disrupted the relative influence of different economic actors on politics. Specifically, both campaign contributions and lobbying expenditures among the firms most exposed to the crisis declined significantly (see the figure below). Furthermore, these shifts in the tools of political influence tended to impact incumbents negatively, with more political capital being directed toward open seats.

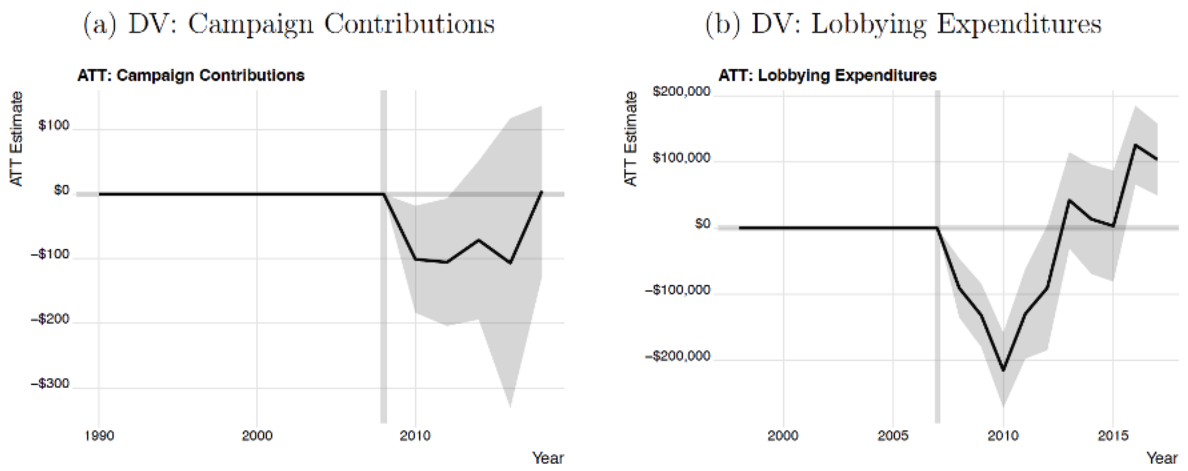


Figure: Average treatment effects on the treated. The campaign contributions (left) and lobbying expenditures (right) made by firms most exposed to the 2008 GFC declined significantly (compared to firms insulated from the global financial crisis). The effects persist for two election cycles. Data for these models include approximately 4.85 million observations each. Estimates of the average treatment effect on the treated come from the *tjbal* package for R, which matches treated and control units on both their pre-treated covariates as well as their pre-intervention outcomes themselves. See Hazlett and Xu (2018) for details on the method. Covariates included in the model are firm size, sales, and sector.

Many scholars of anti-globalization are rightly scrutinizing the origins of the recent backlash focusing on changes in voter preferences. Our work emphasizes, instead, the voice of political actors long opposed to globalization. The paper contributes to existing research showing that anti-status quo preferences have persisted throughout the integration of world markets (Jensen, Quinn, and Weymouth 2017; Bearce and Moya 2020; Mutz 2021) and especially after economic crises (Alarian 2017; Acevedo 2020; Lonergan and Blyth 2020).

We contend that an important effect of the GFC was to increase the relative influence of these preferences in US politics. We suggest a channel through which these relative shifts in economic power translate into political power. Our analysis reveals a mechanism by which the GFC amplified the political voice and representation of people who had been losing from the status quo economic system.

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Leonardo Baccini, Costin M. V. Ciobanu and Krzysztof Pelc, "Offshoring, Automation, and the Demand for Radical Political Action."

Cameron Ballard-Rosa, Judith Goldstein and Nita Rudra, "Trade as Villain: The Fading American Dream and Declining Support for Globalization."

Sarah M. Brooks and Soohyun Cho, "Reconsidering Globalization: Evidence from Sub-Saharan Africa."

Richard T. Clark, Roza Khoban and Noah Zucker, "Breadwinner Backlash: The Gendered Political Consequences of Industrial Decline."

William Roberts Clark, Pablo M. Pinto and Keigo Tanabe, "The Perils of Privilege: Manufacturing Wages, Educational Attainment, and the Populist Response to the China Shock"

Nyron Crawford, Alexandra Guisinger and Katja Kleinberg, "Foreign Policy in a Diverse Society."

Nikhar Gaikwad, Kolby Hanson and Aliz Toth, "How Overseas Opportunities Shape Political Preferences: A Field Experiment on International Migration."

Aycan Katitas and Yunus Emre Orhan, "Affective Polarization and The Electoral Salience of Globalization Policies: Evidence from a Conjoint Experiment in Turkey."

Ze Han, Helen V. Milner and Kris Mitchener, "Anti-Globalization and the Persistence of U.S. Populism."

Junghyun Lim, "Nationalist Backlash and Return Migration."

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Erica Owen, "Political Economy in an Age of Global Production and Automation."

B. Peter Rosendorff and James H. Bisbee, "Anti-Globalization Sentiment: Exposure and Specificity."

Kenneth Scheve and Theo Serlin, "Trains, Trade and Transformation: A Spatial Rogowski Theory of America's 19th Century Protectionism."

Erik Voeten, "The Energy Transition and Voting for the Radical Populist Right: Evidence from the Netherlands."

Ryan M. Weldzius, James Raymond Vreeland and James H. Bisbee, "Political Cleavages and Exposure to the Financial Crisis."

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