

Mass Polarization and Democratic Decline: Evidence from a Half-Century of Public Opinion

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Abstract

An antagonistic political culture has long been thought to pose a threat to liberal democracy, yet causal evidence for this theory remains limited. I argue that mass polarization is unlikely to cause democratic backsliding. Country-year estimates of polarization and democracy spanning up to 86 countries and 47 years enable me to paint a more comprehensive portrait of this relationship than has previously been possible. Contrary to prevailing expectations, both ideological and affective polarization exhibit negligible causal effects on democracy. Instead, I uncover consistent evidence that democratic backsliding can foment polarization in the mass public. Despite widespread concern over the fate of democracy in polarized polities, comparative evidence since the onset of democracy's third wave suggests that mass polarization, by itself, poses little threat to democratic regimes.

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Previously paradigmatic processes of autocratic reversion no longer characterize regime dynamics in the present-day. Outright military *coups d'état*, *autogolpes*, and blatant election fraud have declined in frequency since the late 1970s (Bermeo 2016). Nevertheless, the third reverse wave of democratization foreshadowed by Huntington (1991) appears to be alive and well, characterized by gradual institutional degradation or power-grabs disguised beneath a veneer of legitimacy (Conaghan 2008; Lührmann and Lindberg 2019).¹

Although “polarization” is the term currently in vogue, the idea that profound sociopolitical cleavages might lead to democratic breakdown has long been a key tenet of the democracy literature. The potential for polarization to result in democratic backsliding appears particularly acute because the very divisions that become exacerbated in polarized polities are inherent within democracy itself (Lipset 1960; Rustow 1970). When times are good, these divisions may benefit political society by improving representation through strengthened party brands (Lupu 2013) and by encouraging greater government accountability (Bornschier 2019). When times are bad, however, these divisions can sow discord (Dahl 1971), prompt crises of governance (Linz 1978), and make party systems unresponsive to voters (Sartori 1976). Such normatively undesirable effects characterize the predominant narrative in popular commentary and the academic literature; it is now commonplace to assert that mass polarization threatens democracy (Arbatli and Rosenberg 2021; Rostbøll 2025; Sarsfield et al. 2024).

I challenge that assertion. Elites, not citizens, are the main antagonists in stories of democratic backsliding, and many of the mechanisms linking citizens’ attitudes to elites’ anti-democratic actions begin to break down under scrutiny. Further, there is theoretical reason to believe backsliding might cause polarization rather than the reverse (Goodman 2022; Sarsfield et al. 2024; Somer and McCoy 2018). Case studies and cross-sectional analyses provide clear evidence of a correlation between the two phenomena (Arbatli and Rosenberg 2021; Orhan 2022; Somer et al. 2021), but they make it more difficult to disentangle the direction or presence of causal effects. As a result, our understanding of the relationship between polarization and democracy continues to be unset-

¹Cf. Levitsky and Way (2015).

ttled. Clearly deciphering this relationship carries heightened urgency in an era of global politics characterized by both democratic threats and contentious sociopolitical environments, particularly if policymakers and civil society are to mobilize support in the appropriate areas.

I offer the first causal analysis of the relationship between mass polarization and democracy on a global scale, leveraging country-year panels of polarization and democracy for as many as 86 countries and 47 years. I begin by confirming the correlation between polarization and backsliding observed by other researchers. I urge caution, however, when interpreting this evidence. Results consistently indicate that polarization does not exert meaningful causal effects on democracy in the short-run. Although these negligible effects do accumulate to some extent over time, the full long-term effects of polarization take up to forty years to fully materialize, placing the time horizon well outside the range with which scholars are typically concerned.

I explore two reasons why the commonly observed correlation between polarization and democracy does not translate into the causal association scholars typically assume. First, I document appreciable effects in the opposite direction, suggesting that democratic crises fuel both ideological and affective polarization in the mass public. Second, I show that even after accounting for within-country effects, ideological polarization tends to covary with backsliding on a between-country basis. The belief that mass polarization drives democratic decline may reflect a case of causal misattribution—one that warrants greater theoretical nuance and empirical scrutiny.

Theoretical Considerations

Political polarization in comparative perspective has enjoyed renewed attention over the last decade (Gidron et al. 2020; Reiljan et al. 2024; Wagner 2021), but this phenomenon has long been closely tied to the study of democracy. Landmark studies of democratization and political institutionalization point to a contentious political climate as partially responsible for democratic breakdowns and troubled democratic transitions throughout the mid- to late-twentieth century (Huntington 1968; Linz 1978; O'Donnell and Schmitter 1986). It stands to reason that as normal politics regress into

a state of antagonistic interpersonal or inter-party relations, the peaceful management of competing interests following mutually agreeable rules becomes increasingly difficult (McCoy et al. 2018). In this type of political climate, “the polarization, the centrifugal drives, and the tendency toward irresponsibility and outbidding” place democratic regimes at risk (Linz 1978, p. 24). Contemporary scholars have built on this foundation with a specific eye toward democratic backsliding after the third wave of democratization, with theory and evidence addressing both structural, macro-level patterns and behavioral, micro-level mechanisms.

At the macro-level, a wellspring of case studies documents the breakdown of democracy in polarized polities. These case studies span the globe, drawing evidence from Southeast Asia (Aragay and Slater 2019), Asia Minor (Aydin-Düzgit 2019), the United States (Kaufman and Haggard 2019), Europe (Church and Vatter 2016), Latin America (Hunter and Power 2019), and Africa (Khadiagala 2019). Several syntheses sum up the bounty of evidence to argue that polarization, left unchecked, is almost deterministically detrimental to democracy (Carothers and O’Donohue 2019; Lieberman et al. 2019; Somer and McCoy 2019).

Levitsky and Ziblatt (2018) provide perhaps the most high-profile warning. They examine authoritarian behavior by democratically elected presidents—based mostly on Latin America and Eastern Europe—and argue that polarized party systems enable the rise of populist politicians who willingly dismantle democratic institutions and erode political norms. Polarization might enable such behavior by distorting meso-level institutions like interest groups, state parties, and the media (Pierson and Schickler 2020). Instead of acting as bulwarks against further polarization and democratic decline, meso-level institutions reinforce those phenomena by tightly binding themselves to a particular party and increasing the incentives for politicians to acquiesce to extremists (Roberts 2019).

Studies focusing on the micro-level offer some insight into how mass polarization can feed into these political incentives and increase the likelihood of backsliding. Scholars hypothesize that polarization encourages citizens to vote for more extreme or confrontational candidates (Abramowitz and Webster 2016; Iyengar et al. 2019), decreases their support for democratic norms (Mason

2018; Simonovits et al. 2022), and erodes their dedication to accountability (Iyengar and Krupenkin 2018; Iyengar et al. 2012). Svolik (2012; 2019) argues that voters are often presented with a tradeoff between upholding democracy and pursuing partisan goals, and that as politics become more polarized, individual voters' willingness to resolve this tradeoff at the expense of democracy increases (Graham and Svolik 2020; Svolik 2020). Kingzette et al. (2021) similarly contend that affective polarization generates cognitive biases which produce asymmetric democratic preferences; partisans oppose constitutional protections when their party is in power and support such measures when they are out of power (Finkel et al. 2020; Simonovits et al. 2022).

Challenging Prevailing Wisdom

Despite the predominant narrative in the academic literature and public commentary, there are at least two reasons to be skeptical that mass polarization causes democratic backsliding. First, backsliding is driven by elites (Druckman 2024; Grillo and Prato 2023; Helmke et al. 2022), not the general public. In her analysis of interwar Europe and mid-twentieth century South America, Bermeo (2003) concludes that ordinary citizens did not usually defect to extremist parties or otherwise abandon the political center. Polarization, she suggests, is therefore not an important contributor to democratic backsliding. Instead, democratic collapse is primarily attributable to leadership failure and an inability of political elites to accurately gauge public opinion.

More recent episodes exhibit similar dynamics. Despite a variety of democratic crises throughout twenty-first-century Europe, citizens' attitudes toward their governments, their enthusiasm for democracy, and their willingness to elect far-right parties have all remained nearly unchanged since the turn of the century (Bartels 2023). Instead of extending from deteriorating democratic support in the electorate, recent backsliding episodes are more accurately characterized by opportunistic politicians from traditional conservative parties enhancing their power once elected (see also Scheppele 2018).

Those opportunistic politicians are often populists (e.g. Levitsky and Loxton 2013; Levitsky and Ziblatt 2018), but even most populists fail to degrade democratic institutions. The few who

have been successful have needed some combination of pre-existing institutional weakness, unusually high revenue, and resolutions to at least one major security or economic crisis (Weyland 2024a; Weyland 2024b). Instead, populists typically find their authoritarian ambitions thwarted by the strength of democratic institutions and voters' unwillingness to overlook poor performance in office (Weyland 2022).

A second reason to doubt the impact of mass polarization on democracy is that many of the proposed mechanisms linking the two are supported by only limited empirical evidence. Countries are often vulnerable to democratic infringements during major crises, as elected executives take the opportunity to enrich their power and influence over policy (Bermeo 2016). However, evidence suggests crises have little to no effect on popular support for a president's institutional authority to act unilaterally. Survey data from Africa and the Americas show citizens in presidential systems are consistently skeptical of executive power, dedicated to democratic principles, and capable of exercising electoral accountability (Reeves and Rogowski 2022). In their analysis of support for executive aggrandizement during the COVID-19 pandemic, Lowande and Rogowski (2021) uncover null effects and argue that polarization places an upper bound on the extent to which crises can lead to augmented executive authority. One explanation for this upper bound could be that when societies are evenly divided, each party is limited in the amount of popular support it can win. With more voters dedicated to one party or another and fewer ideological moderates willing to switch party loyalty each election cycle, it is difficult for any one party to win the legislative seats or votes necessary to make significant changes to democratic institutions (Weyland 2020, fn. 13).

Even if voters are willing to overlook executive aggrandizement, that does not necessarily imply anti-democratic attitudes, nor does it implicate polarization as the cause (Krishnarajan 2023). On one hand, citizens oppose acts of executive aggrandizement regardless of partisanship (Touchton et al. 2023), and such actions have null or even negative effects on vote intentions across all party affiliations (Gidengil et al. 2022). On the other hand, many voters simply value the majoritarian aspect of democracy and believe duly elected executives have been granted the authority to

act unilaterally (Davis et al. 2022). These types of voters endorse power-grabs even when they are conducted by the *opposing* party (Grossman et al. 2022). Conversely, citizens who value more liberal aspects of democracy tend to condemn anti-liberal actions by elites even when they are *co-partisans* (Wunsch et al. 2025). These are not the results one would expect if partisan polarization was the culprit.

The relationship between strong party affect and support for democracy has likewise struggled to stand up to empirical scrutiny (Druckman et al. 2023; Druckman et al. 2024). Broockman et al. (2023) show how results purportedly showing that affective polarization degrades democratic attitudes are observationally equivalent to alternate explanations, such as ethnic antagonism (Bartels 2020). Across five experiments, they find no evidence for the apparent connection between party affect and democratic support. Voelkel et al. (2023) present two additional experiments with the same null findings and conclude that past work has substantially overestimated the existence of a causal link. Even if polarization did cause declines in democratic attitudes, whether those declines would lead to actual degradation of democratic institutions is another matter entirely.

This is not to say that backsliding and mass polarization do not co-occur; this correlation has surfaced repeatedly in both quantitative and qualitative studies (e.g. Levitsky and Ziblatt 2018; McCoy et al. 2018; Orhan 2022), and I replicate it below. It does suggest, however, that the *causal* effects underlying this relationship may be more complicated than typically assumed. It could be, for instance, that perceived or actual democratic crises instigate political polarization, not the reverse. Citizens take cues from their preferred parties to make sense of political issues (Zaller 1992). Democratic crises are therefore likely to be viewed by citizens through the lens of parties, with the incumbent party or coalition seen as the aggressor (or rightful reformer) and the others seen as the victims (or threats to be guarded against). Once this cleavage is activated, it manifests in heightened positive affect toward one's preferred party and negative affect toward other parties (Goodman 2022). Somer and McCoy (2018, p. 6) highlight a similar pathway, positing polarization as a "consequence of crises rooted in democracy's internal tensions and contradictions" (see also Sarsfield et al. 2024).

Case studies across four continents show how this opposition to and politicization of democratic crisis leads to the familiar forms of polarization. In Greece, a populist cleavage contributed to dehumanizing elite rhetoric and subsequent polarization (Stavrakakis 2018). Slater and Arugay (2018) argue the roots of polarization in four Asian democracies were decidedly institutional, activated by abuses of power by popularly elected chief executives. Similarly, state capture and the politicization of democratic institutions in South Africa has sparked renewed polarization in the present-day, primarily along existing lines of race and class (Southall 2019). Even in Venezuela—one of the foremost examples of polarization and democratic collapse—polarization was structured around a democratic cleavage, with divergent social groups gradually adopting conflicting views of democracy in response to repeated violations of democratic norms during the presidency of Hugo Chávez (García-Guadilla and Mallen 2019; Mallen and García-Guadilla 2017). In these cases, it is the degradation of democratic norms and institutions that sparks mass political polarization.

Causal Models of Polarization and Democracy

Existing accounts of polarization and democracy are hard-pressed to identify a generalizable causal effect. It would be neither practical nor ethical to experimentally manipulate polarization at the macro-level. Observational studies typically focus on specific cases or regions (McCoy et al. 2018; Slater and Arugay 2018), raising questions about external validity. Even large-N studies are constrained by data availability (Orhan 2022; Somer et al. 2021); with only a handful of data points for each case (Garzia et al. 2023; Gidron et al. 2020; Reiljan et al. 2024), leveraging temporal change for causal identification is difficult.

Figure 1, panel (a) depicts the sort of cross-sectional relationship scholars are currently equipped to estimate. The solid black lines indicate the effect of polarization, p_{ct} , on democracy, d_{ct} , in country c at time t —the primary quantity of interest. That relationship is confounded by covariates, X_{ct} , which conceivably affect both p_{ct} and d_{ct} , indicated by dashed lines. Because these analyses are cross-sectional, each time period is isolated from the others. It is therefore im-

possible to know whether scholars have identified the black arrow linking p_{ct} to d_{ct} or the gray arrow linking d_{ct} back to p_{ct} . Analytically, this simple correlational model is expressed in (1), where α is an intercept, δ gives the non-causal effect of polarization on democracy, $\boldsymbol{\gamma}$ is a vector of coefficients on covariates, and ε_{ct} is random error:

$$d_{ct} = \alpha + \delta p_{ct} + \boldsymbol{\gamma} \mathbf{X}_{ct} + \varepsilon_{ct}. \quad (1)$$

I fit this model using ordinary least squares (OLS) to get a preliminary sense of how polarization correlates with democracy. This model also serves as a reasonable replication of previous work relating mass polarization to democracy, so the effect of interest, δ , should carry a negative sign. However, this effect should be interpreted as purely correlational. It is impossible for existing studies to tease apart whether this correlation is due to variation *within* countries or *across* them.

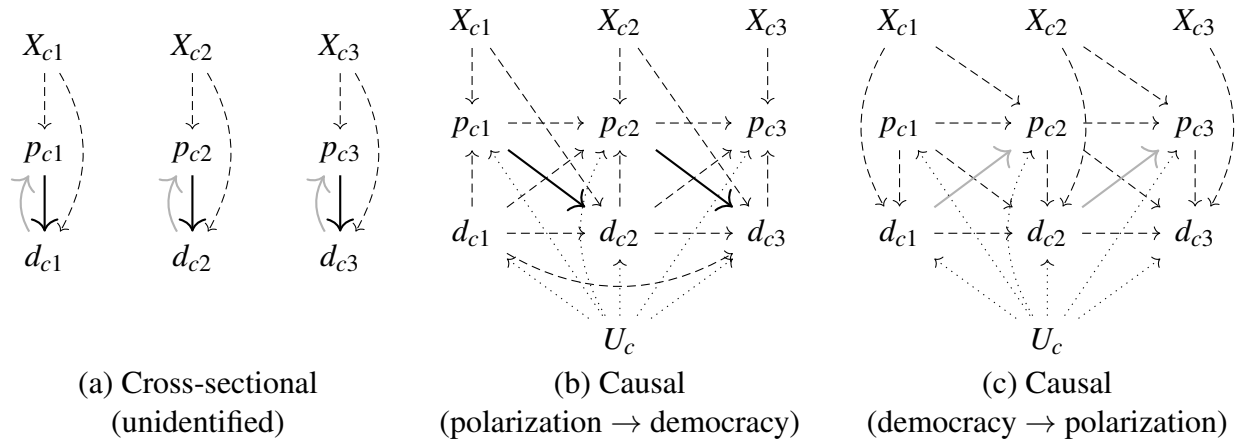


Figure 1: Directed Cyclic and Acyclic Graphs of Polarization-Democracy Relationships. X_{ct} , p_{ct} , d_{ct} , and U_{ct} denote covariates, polarization, level of democracy, and unobserved effects in country c at time t . Solid arrows represent key effects of interest, dashed arrows represent effects of observed variables, and dotted arrows represent effects of unobserved variables.

Indeed, the complex theoretical relationships linking polarization to democracy present several challenges that make cross-sectional analysis inappropriate for identifying a causal effect. First, as discussed above, democratic backsliding may exhibit reciprocal causation with mass polarization. Temporally frequent observations of polarization and democracy can help separate these effects. Second, the effect of any variable on democracy is likely to be delayed. In line with other schol-

ars (Acemoglu et al. 2009; Boix 2011; Welzel 2013), I assume explanatory variables affect only *future* levels of democracy, not present ones. Third, polarization and democracy are likely serially correlated, with the state of each variable at time t directly affected by its state at time $t - 1$. This challenge is particularly acute for levels of democracy, which may exhibit second-order serial correlation (Claassen 2020; Teorell 2010). Finally, each country's experience with democracy is idiosyncratically affected by unobserved variables. Countries may experience critical junctures that affect their path to democratization, influence their long-term political culture, or shape key institutions (Collier and Collier 1991; Rueschemeyer et al. 1992).

Figure 1, panel (b) incorporates these relationships using a directed acyclic graph (Imbens and Rubin 2015; Pearl 2009). U_c denotes unobserved, time-invariant effects in country c , and all other variables are defined as in panel (a). The solid black arrow still denotes the primary quantity of interest—the effect of polarization on democracy. Formally expressing the relationships shown in Figure 1, panel (b) yields a dynamic fixed effects model similar to those common in other studies of democracy (Acemoglu et al. 2008; Boix 2011; Haber and Menaldo 2011). This model is expressed in (2), where β_1 and β_2 indicate lagged effects of the dependent variable, U_c denotes country fixed effects, and all other terms are defined as in (1):

$$d_{ct} = \delta p_{c,t-1} + \beta_1 d_{c,t-1} + \beta_2 d_{c,t-2} + \gamma \mathbf{X}_{c,t-1} + U_c + \varepsilon_{ct}. \quad (2)$$

In this specification, δ can be interpreted as the change in democracy at time t due to polarization at time $t - 1$.

Finally, Figure 1, panel (c) presents a similar plot that identifies the causal effect of changes in the level of democracy on the degree of mass polarization, identified by the solid gray arrow, just as in panel (a). I only assume first-order serial correlation for polarization, so this model requires only one β term:

$$p_{ct} = \delta d_{c,t-1} + \beta p_{c,t-1} + \gamma \mathbf{X}_{c,t-1} + U_c + \varepsilon_{ct}. \quad (3)$$

Here, δ provides the change in polarization at time t due to democracy levels at time $t - 1$.

Models such as those in (2) and (3) present another difficulty, however, because the lagged dependent variables will be correlated with ε_{ct} when the number of units (in this case, the number of countries C) is larger than the number of time periods T (Keele and Kelly 2006; Nickell 1981), violating standard exogeneity assumptions. To ameliorate this bias, I employ a system general methods of moments (GMM) estimator with heteroskedasticity-consistent standard errors (Windmeijer 2005), which uses an additional dependent variable lag as an instrumental variable (Arellano and Bover 1995; Blundell and Bond 1998).² These effects have a causal interpretation under two assumptions: First, no unobserved time-variant confounder exists, and second, temporally distant levels of democracy affect present levels only by acting through more temporally proximate levels (Imai and Kim 2019).³

Data

Mass Polarization

One drawback to existing studies of polarization and democratic backsliding is their narrow spatiotemporal focus. Case studies provide rich contextual information but require caution when generalizing. Most quantitative datasets of polarization contain only a handful of observations—often inconsistently spaced across time—for each case (Gidron et al. 2020; Reiljan et al. 2024; Wagner 2021). Causal identification is difficult to achieve under such circumstances. Instead, I draw estimates of ideological and affective polarization from the Polarization in Comparative Attitudes Project (PolarCAP; Mehlhaff 2025). PolarCAP uses measurement models to estimate country-year panels of polarization, greatly expanding the amount of survey data available for use. I take yearly estimates of ideological polarization for ninety countries from 1971-2019, and estimates of affective polarization for fifty-two countries from 1975-2019.

²See Wawro (2002) for an overview and Claassen (2020), Milner and Mukherjee (2009), and Quinn and Toyoda (2007), among others, for applied examples.

³That is, d_{c1} has no direct effect on d_{c4} , for example. Instead, d_{c1} affects d_{c2} and d_{c3} , which affect d_{c4} in turn.

These data confer at least three important advantages over previous studies. First, as quantitative measures, they display greater fealty to the conceptual understanding of polarization, where intergroup heterogeneity and intragroup homogeneity are both important (Mehlhaff 2024). Second, the broad spatiotemporal scope facilitates generalizable inferences. Finally, and perhaps most importantly, having yearly panel estimates enables causal tests using time series methods like the ones I describe above.

Level of Democracy

Ideal for analyzing democratic backsliding would be a fully continuous measure sensitive enough to respond to gradual degradations in level or quality of democracy (Lührmann and Lindberg 2019). But scholars highlight many different dimensions and subtypes of democracy (Ahmed 2023; Collier and Levitsky 1997; Jee et al. 2022) and backsliding can occur in different ways (Bermeo 2016). I therefore use three different measures to approach the concept from multiple angles.

I take the first two from the Varieties of Democracy (V-Dem) project (Coppedge et al. 2020; Pemstein et al. 2020). V-Dem draws more than four hundred indicators from factual information and evaluations by country-expert coders and aggregates them into theoretically distinct dimensions of democracy (Lindberg et al. 2014). The electoral dimension is closely tied to the concept of polyarchy (Dahl 1971); it gauges “competition for the approval of a broad electorate during periodic elections.” The liberal dimension, by contrast, captures things like “constitutionally protected civil liberties, strong rule of law, and effective checks and balances that limit the use of executive power” (Lindberg et al. 2014, p. 160). The electoral and liberal democracy dimensions are well-positioned to capture backsliding through electoral manipulation and executive aggrandizement, respectively, so I evaluate them both.

Scholars enthusiastically debate the merits of measures like V-Dem—which rely on assessments of individual coders—relative to more “objective” indicators such as incumbent party dominance or executive constraints (Cheibub et al. 2010; Little and Meng 2024; Weitzel et al. forthcoming).

ing). Little and Meng (2024) provide a summary measure which incorporates twelve indicators into a simple additive index, including aspects like the proportion of the population with suffrage, the degree of legislative competitiveness, and violations in electoral processes. Knutsen et al. (2024) raise several important critiques of this index's validity, and Miller (2024) points out that it struggles to capture changes in democratic quality in countries that are already liberal democracies. I nevertheless include it as a complement to V-Dem's more comprehensive measures; because they are primarily suitable for detecting large, clearly observable changes in the status of a country's institutions, the objective indicators provide a sense of whether polarization may be connected to wholesale changes in a country's regime, rather than the more gradual form of backsliding captured by V-Dem indices.⁴ Combining these three measures of democracy with PolarCAP measures of mass polarization, all of which are available on a yearly basis, allows for a fine-grained analysis of polarization and democratic backsliding over time and across countries.

Control Variables

I identify four variables that may point to alternative explanations for democratic backsliding. First, although institutions are not exogenous to political factors, presidential systems may be more prone to backsliding than others (Cheibub 2002; Linz 1990). I therefore include a binary indicator of presidentialism. Second, modernization theory suggests that higher levels of economic development decrease the likelihood of democratic collapse (Lipset 1960; Przeworski et al. 2000), so I include logged GDP per capita for each country-year. Third, states dependent on natural resources may be less capable of preserving democracy (Haber and Menaldo 2011; Ross 2001). I capture this with a measure of total natural resource rents as a percentage of GDP in each country-year (*World Development Indicators* 2021). Finally, several influential theories emphasize the relationship between democracy and economic inequality (Acemoglu and Robinson 2006; Ansell

⁴In the Supplementary Information, I replicate the main analyses within each regime type to guard against the possibility that effects may be different in liberal democracies than in other regimes.

and Samuels 2014), so I include market income inequality as measured by the Gini coefficient (Solt 2020).⁵

Alternate explanations of mass polarization require slightly different considerations. Executive institutions still figure to be important; a core mechanism underlying the “perils of presidentialism” hypothesis is that presidential systems lend themselves to more heated rhetoric in pursuit of policy goals (Linz 1990). Strong rhetoric at the elite level seems likely to trickle down to the mass public, manifesting in polarization. Economic crisis and inequality are also implicated in many studies of polarization (McCarty et al. 2006; McCoy et al. 2018), so I again include GDP per capita and market income inequality in models of polarization. Finally, majoritarian electoral systems are typically understood to have greater centrifugal effects on party systems than proportional systems do, resulting in more extreme parties and greater polarization (Cox 1990; Dow 2011). I therefore include an indicator of electoral system type. All control variables are time-variant.

The Negligible Causal Effect of Polarization on Democracy

I begin by fitting the cross-sectional OLS model in (1) to assess the degree to which polarization is correlated with level of democracy. All real-valued variables are unit-normalized, so all parameter estimates can be interpreted in terms of standard deviations. Estimates of δ , presented in Table 1, imply that mass polarization is negatively associated with democracy, with a one standard deviation increase in polarization corresponding to a decrease in democracy of up to 0.108 standard deviations. This effect is statistically distinguishable from zero at the $p < 0.05$ level across all but one combination of democracy and polarization variables. These results are consistent with previous studies of polarization and democracy, offering additional empirical support for their co-occurrence and increasing confidence that the yearly measures used here capture substantively meaningful patterns observed in prior work.

⁵Market income refers to the money coming into a household before taxes or transfers of any kind.

Table 1: Cross-Sectional Models of Polarization and Democracy

	<i>Dependent variable:</i>					
	Electoral		Liberal		Objective	
	(1)	(2)	(3)	(4)	(5)	(6)
Ideological	−0.108* (0.011)		−0.090* (0.010)		−0.106* (0.017)	
Affective		−0.032* (0.013)		−0.030* (0.013)		−0.005 (0.020)
Presidential	−0.057* (0.025)	0.242* (0.033)	−0.143* (0.023)	0.172* (0.032)	0.272* (0.039)	0.610* (0.050)
GDP	0.634* (0.013)	0.805* (0.020)	0.672* (0.012)	0.891* (0.020)	0.253* (0.020)	0.327* (0.031)
Gini	0.086* (0.011)	0.129* (0.013)	0.083* (0.011)	0.132* (0.013)	0.125* (0.018)	0.171* (0.021)
Resources	−0.093* (0.011)	−0.269* (0.025)	−0.102* (0.010)	−0.268* (0.024)	−0.119* (0.017)	−0.239* (0.039)
Intercept	0.037* (0.016)	−0.196* (0.023)	0.068* (0.015)	−0.189* (0.022)	−0.168* (0.026)	−0.315* (0.037)
Observations	3882	2058	3882	2058	3123	1813
R ²	0.546	0.543	0.621	0.615	0.121	0.134
Adjusted R ²	0.546	0.541	0.621	0.614	0.120	0.132

Note: *p<0.05. Values in parentheses give standard errors. All real-valued variables unit-normalized.

Table 2: System GMM Models of Polarization and Democracy

	<i>Dependent variable:</i>					
	Electoral		Liberal		Objective	
	(1)	(2)	(3)	(4)	(5)	(6)
Ideological _{<i>t</i>-1}	-0.005 (0.003)		-0.004 (0.003)		-0.013 (0.010)	
Affective _{<i>t</i>-1}		-0.002 (0.004)		-0.003 (0.004)		-0.015 (0.013)
Democracy _{<i>t</i>-1}	1.190* (0.034)	1.161* (0.059)	1.223* (0.027)	1.201* (0.052)	0.994* (0.034)	0.896* (0.069)
Democracy _{<i>t</i>-2}	-0.251* (0.029)	-0.292* (0.056)	-0.274* (0.028)	-0.290* (0.053)	-0.138* (0.023)	-0.172* (0.038)
Presidential _{<i>t</i>-1}	0.017* (0.006)	0.023 (0.015)	0.010* (0.005)	0.019 (0.012)	0.037* (0.016)	0.105* (0.033)
GDP _{<i>t</i>-1}	0.040* (0.012)	0.090* (0.034)	0.035* (0.012)	0.068* (0.028)	0.013 (0.013)	0.035 (0.028)
Gini _{<i>t</i>-1}	0.007* (0.003)	0.018 (0.011)	0.005 (0.003)	0.008 (0.008)	0.016 (0.011)	0.037 (0.026)
Resources _{<i>t</i>-1}	-0.007 (0.004)	-0.027 (0.022)	-0.007 (0.004)	-0.023 (0.018)	-0.031* (0.009)	-0.051 (0.027)
N Observations	3723	2008	3723	2008	2966	1721
N Units	86	48	86	48	83	48
N Time Periods	47	44	47	44	38	38
Arellano-Bond Z	-2.831*	-1.216	-0.767	-0.689	-0.957	-0.281
Hansen-Sargan χ^2	82.167	43.173	82.193	44.484	80.115	42.627

Note: *p<0.05. Heteroskedasticity-consistent standard errors in parentheses. All real-valued variables unit-normalized.

However, applying the causal model in Figure 1, panel (b) begins to change the picture. Table 2 presents results of the system GMM models used to fit (2). All estimates of δ still carry nega-

tive signs, but none of them achieve statistical significance at the same $p < 0.05$ level.⁶ Further, most point estimates of δ are substantially smaller than in the cross-sectional model, with a one standard deviation increase in polarization now leading to a decrease in democracy of between 0.002 and 0.015 standard deviations—a decrease in effect size of between 86 and 96 percent when comparing system GMM to cross-sectional estimates.⁷ All Hansen-Sargan test statistics and all but one Arellano-Bond statistic are insignificant, indicating that the GMM instruments are valid and successful in partialling out the second-order serial correlation, so I can be confident these null results are not simply a consequence of slow-moving dependent variables.

Testing for Negligible Effects

The analysis so far suggests the observed relationship between mass polarization and democratic backsliding is primarily correlational and the causal effect is more muted. However, statistically insignificant parameter estimates are not themselves evidence of a negligible effect. The null hypothesis significance tests in Table 2 demonstrate only that the data are *consistent* with polarization having no effect on democracy. To argue for a negligible effect, I need to demonstrate that the data are *inconsistent* with polarization having any meaningful effect on democracy. Confidence intervals which include zero are not sufficient evidence for such a claim because they could merely reflect low statistical power (Doucette forthcoming) and do not rule out effects that could, in fact, be meaningful (Gill 1999).

Instead, I use a two-step procedure for demonstrating evidence of a negligible effect (Rainey 2014): First, identify how large an effect must be in order to be considered meaningful and clearly state a hypothesis for testing whether the effect rises to that level. Second, construct a 90% equal-tailed confidence interval for the effect estimate to test the hypothesis (Berger and Hsu 1996). If

⁶The Supplementary Information describes other time series modeling approaches, including pooled OLS and binomial logits. I also fit quasi-Poisson models of discrete backsliding events (Baron et al. 2024). All results are substantively similar.

⁷ $\hat{\delta}$ actually increases in magnitude in the models testing objective democratic indicators and affective polarization, but neither model's estimate is statistically significant.

the effect size identified as meaningful lies entirely outside the confidence interval, the data can be interpreted as being inconsistent with any meaningful effect.

As a benchmark for meaningful effect sizes, I calculate the standard deviation of each democracy indicator within each country and identify the most stable democracies over the time period under consideration.⁸ In the case of both electoral and liberal democracy, Denmark displays the least change over time. From 1971 to 2019, Denmark's levels of electoral and liberal democracy have standard deviations of 0.038 and 0.043, respectively.⁹ According to the objective measure, Switzerland experiences the least change, with an over-time standard deviation of 0.147.¹⁰ Democracy in Denmark and Switzerland is so stable that its fluctuations over time likely represent little more than measurement uncertainty. At a bare minimum, effects of polarization should be able to clear these thresholds in order to be considered meaningful. This implies a set of hypotheses:

$$\begin{aligned} H_0 : \quad \hat{\delta} &\in (-\infty, -\tau] \cup [\tau, \infty), \\ H_1 : \quad \hat{\delta} &\in (-\tau, \tau), \end{aligned} \tag{4}$$

where $\hat{\delta}$ is the estimated effect size and τ is the threshold for a meaningful effect size—0.038 in the case of electoral democracy, 0.043 in the case of liberal democracy, and 0.147 in the case of objective indicators. Therefore, if the 90% confidence interval for the effect size does not contain τ , I should reject the null hypothesis that polarization has a meaningful effect on democracy in favor of the alternate hypothesis that polarization has a negligible effect on democracy.

Figure 2 displays these 90% confidence intervals.¹¹ Dashed vertical lines indicate $-\tau$ and τ , the values outside which polarization could be interpreted as having a meaningful effect on democracy. Clearly, all confidence intervals are well within these thresholds, regardless of the type

⁸Each democracy indicator is unit-normalized, so they can be directly compared to model parameter estimates.

⁹Contrast these estimates to those of the most volatile country, Chile, whose electoral and liberal democracy estimates display standard deviations of 1.34 and 1.26, respectively.

¹⁰The most volatile is Bulgaria, with a standard deviation of 1.96.

¹¹The Supplementary Information breaks this analysis down by regime type.

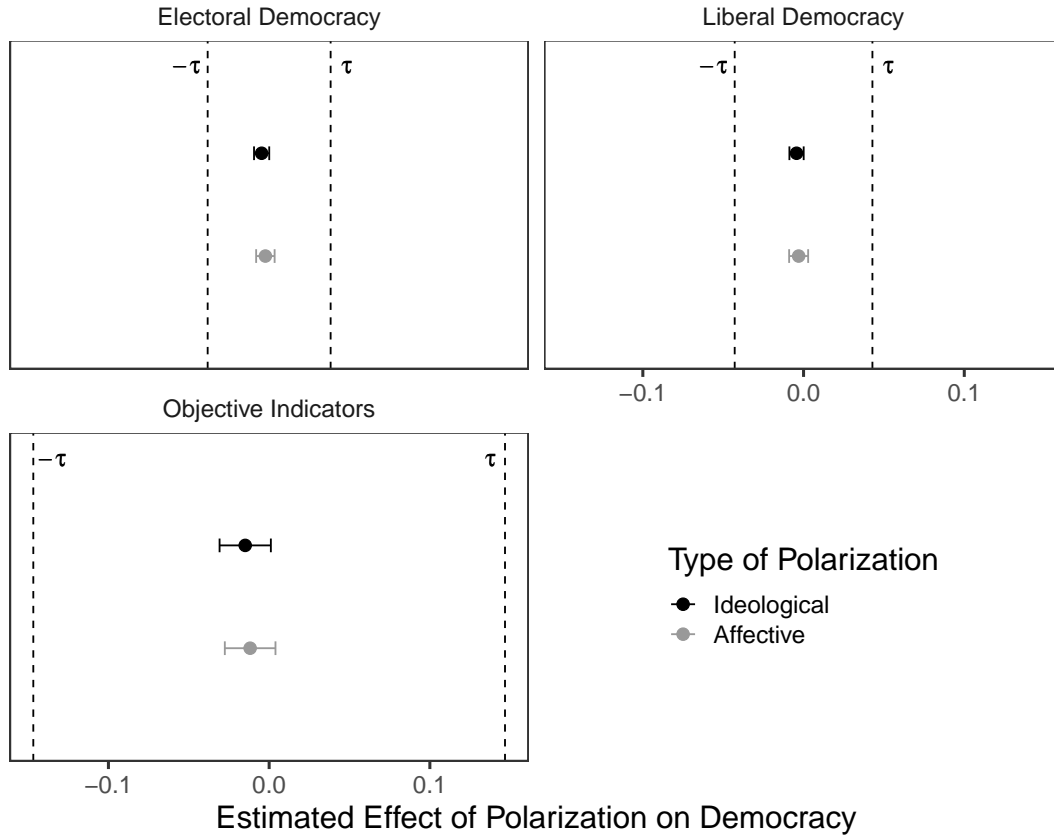


Figure 2: Testing for a Negligible Effect of Polarization on Democracy. Point estimates correspond to δ in (2), as displayed in Table 2. Error bars give 90% confidence intervals. Dotted lines represent $-\tau$ and τ for each dimension of democracy.

of model, type of polarization, or dimension of democracy. Thus, I reject H_0 in favor of H_1 and conclude that mass polarization does, indeed, have a negligible effect on level of democracy.

Long-Run Effects

Analyses up to this point have investigated only *short-run* effects. The effects of polarization could be cumulative; polarization at time $t - 1$ could exert a small effect on democracy at time t but nevertheless contribute to a snowballing effect over time, resulting in larger changes in democracy at time $t + 1$, $t + 2$, and so on. To investigate this possibility, I use the long-run multiplier under the assumption of stationarity:

$$LR_{pc} = \frac{\hat{\delta}}{1 - (\hat{\beta}_1 + \hat{\beta}_2)}, \quad (5)$$

where $\hat{\delta}$ denotes the estimate for the coefficient on polarization and $\hat{\beta}_1$ and $\hat{\beta}_2$ denote the estimates for the coefficients on lagged democracy (De Boef and Keele 2008; Wilkins 2018).

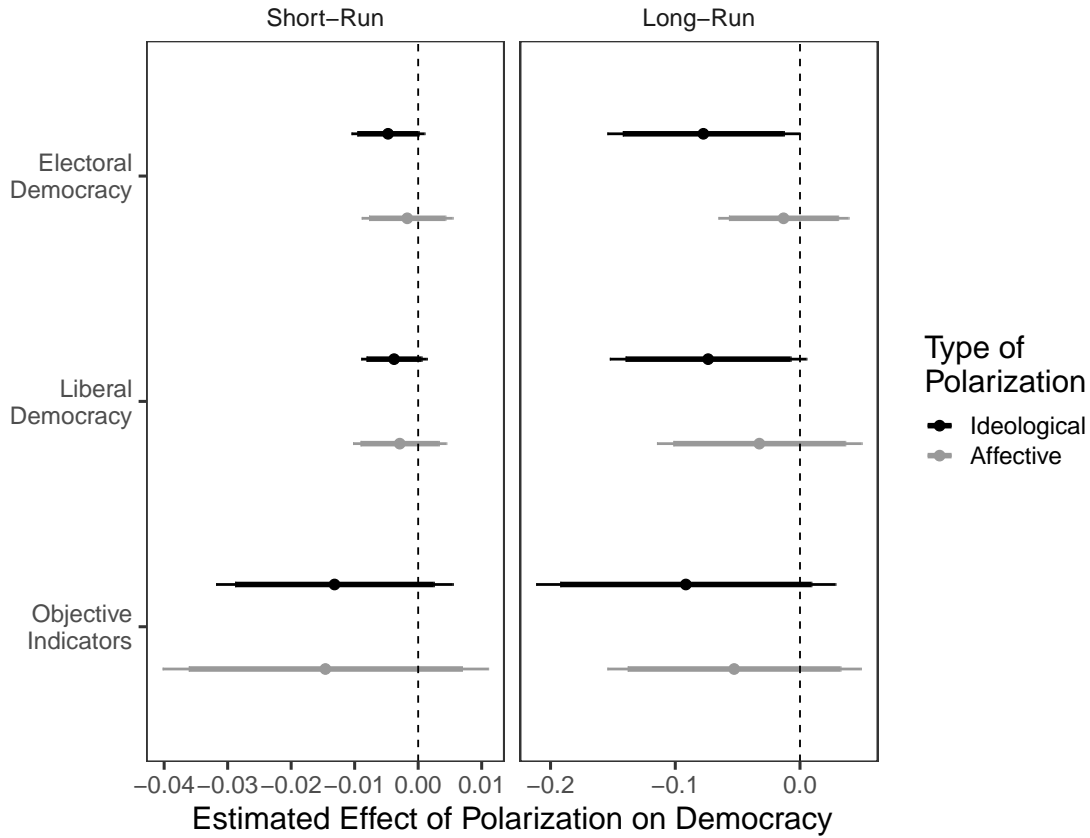


Figure 3: Short-Run and Long-Run Effects of Polarization on Democracy. Short-run point estimates are taken from Table 2. Long-run point estimates are calculated using (5). Error bars give 90% and 95% confidence intervals.

Figure 3 displays the estimated short- and long-run effects of polarization on democracy using estimates from Table 2. Thick and thin error bars give 90% and 95% confidence intervals, respectively, with standard errors calculated using the delta method. An increase in polarization level does appear to accumulate over time; estimates of long-run effects are four to nineteen times those of short-run effects. However, in only two cases are these long-run effects statistically distinguishable from zero at the $p < 0.05$ level. Cumulative effect sizes of a one standard deviation increase in

level of polarization range from 0.013 to 0.092 standard deviations; four of the six long-run effects still would not clear the minimum effect thresholds from Figure 2. Moreover, this effect assumes that the shock to polarization is *permanent*. Although this assumption is helpful for comparing immediate and delayed effects, it almost certainly does not hold in reality, implying that the long-run effect is not likely to be fully realized.

Even assuming this condition is a reasonable approximation of the real world, the total long-run effect shown in Figure 3 is distributed over an arbitrarily long period of time. To find *how long* this effect takes to transpire, I calculate the number of years required for the cumulative effect of the polarization shock to reach 50% and 95% of the total effect. The shock to ideological polarization produces 50% of its total effect within 4 to 10 years, depending on the dimension of democracy. Affective polarization effects are more muted, but they accumulate more quickly, needing only 2 to 6 years to reach half their total value. These are reasonable time horizons, but consider that the total long-run effect was, in many cases, still quite small. Realizing only half that effect implies an impact that is much smaller still.

Due to non-linear decay, the accumulation of each effect slows down over time. Effects of ideological polarization do not begin to approach their asymptote (95% of the total long-run effect) for 17 to 40 years, and effects of affective polarization require 7 to 22 years to fully materialize. In all cases, the objective democracy indicators are affected more quickly than either of the more comprehensive electoral or liberal democracy measures. Although more dramatic than short-run effects, the long-term effects of polarization on democracy do not appear to be appreciable overall. Even in the case of ideological polarization, which has slightly stronger effects than affective polarization, the time horizon at which those effects fully materialize is beyond the temporal scope with which social scientists are often concerned.

Reconciling Cross-Sectional and Causal Estimates

Results suggest that on a purely cross-sectional basis, mass polarization has a negative, statistically significant effect on democracy. This finding is in line with much existing work on the topic,

including myriad case studies and qualitative accounts. However, they also suggest that mass polarization *causes* virtually no change in democracy. Neither ideological nor affective polarization appear to directly cause backsliding via electoral manipulation or executive aggrandizement, nor do they seem to have meaningful effects on the observable presence of democratic institutions. If so many scholarly accounts intimately link these two phenomena and large-N cross-sectional analyses confirm this correlation, why is the estimated causal effect negligible?

I offer two explanations to account for this evidentiary discrepancy. First, scholars have correctly identified a causal relationship between polarization and democracy, but they have been mistaken about the *direction* of that effect. There is theoretical reason, highlighted above, to believe democratic crisis is likely to contribute to mass polarization. Previous studies reveal this causal sequencing in some of the most high-profile cases of polarization and backsliding (e.g. Mallen and García-Guadilla 2017; Southall 2019). Returning to Figure 1, this explanation implies the cross-sectional relationship is primarily driven by the gray solid arrow in panel (a), but common accounts have mistaken it for the black solid arrow.

The second explanation is that any cross-sectional relationship between polarization and democracy is primarily attributable to variation *between* countries, not *within* them. The former is likely to produce a correlation, but the latter is needed to make a causal attribution. This possibility could arise irrespective of the true direction of the causal arrow, or whether any causal effect exists at all. For example, both mass polarization and democratic backsliding may be caused by some third, time-variant omitted variable that most studies—including this one—miss. I probe these two eventualities in the following sections, finding consistent support for the first and mixed evidence for the second.

Reversing the Causal Arrow: Polarization as an Outcome of Democratic Crisis

I turn first to the inverse causal relationship and evaluate the extent to which democratic backsliding foments mass polarization. This effect is exemplified by the gray solid arrow in Figure 1, panel (c) and expressed formally in (3). As stated above, I assume polarization exhibits only first-order serial correlation. The system GMM models therefore contain one lagged dependent variable and are instrumented with the second lag. Insignificant Arellano-Bond test statistics indicate this specification is sufficient for eliminating serial correlation, and further dependent variable lags are therefore not necessary. Figure 4 displays the estimated short- and long-run effects of democracy on polarization, with the long-run multiplier now given by:

$$\text{LR}_{d_c} = \frac{\hat{\delta}}{1 - \hat{\beta}}, \quad (6)$$

where $\hat{\delta}$ and $\hat{\beta}$ denote parameter estimates from the model in (3).¹² As in Figure 3, thick and thin error bars provide 90% and 95% confidence intervals, respectively.

Figure 4 displays a clear set of results: decreases in level of democracy are consistently—and causally—associated with increases in mass polarization. All parameters on democracy variables carry negative signs regardless of the dimension of polarization or democracy being analyzed, and all but one of those parameter estimates rise to statistical significance at the $p < 0.05$ level. The one relationship that is not significant—the effect of objective indicators on affective polarization—is also the only relationship that was not significant in the cross-sectional analysis. Further, effect sizes are appreciable and, in many cases, larger than the effect sizes for any other explanatory variable.¹³ Comparing the short- and long-run estimates suggests that the effect of democracy on polarization is not ephemeral; it exerts a consistent negative effect, with that effect decaying only

¹²The Supplementary Information presents full results in tabular form.

¹³As before, all variables are unit-normalized, so parameter estimates can be interpreted in terms of standard deviations.

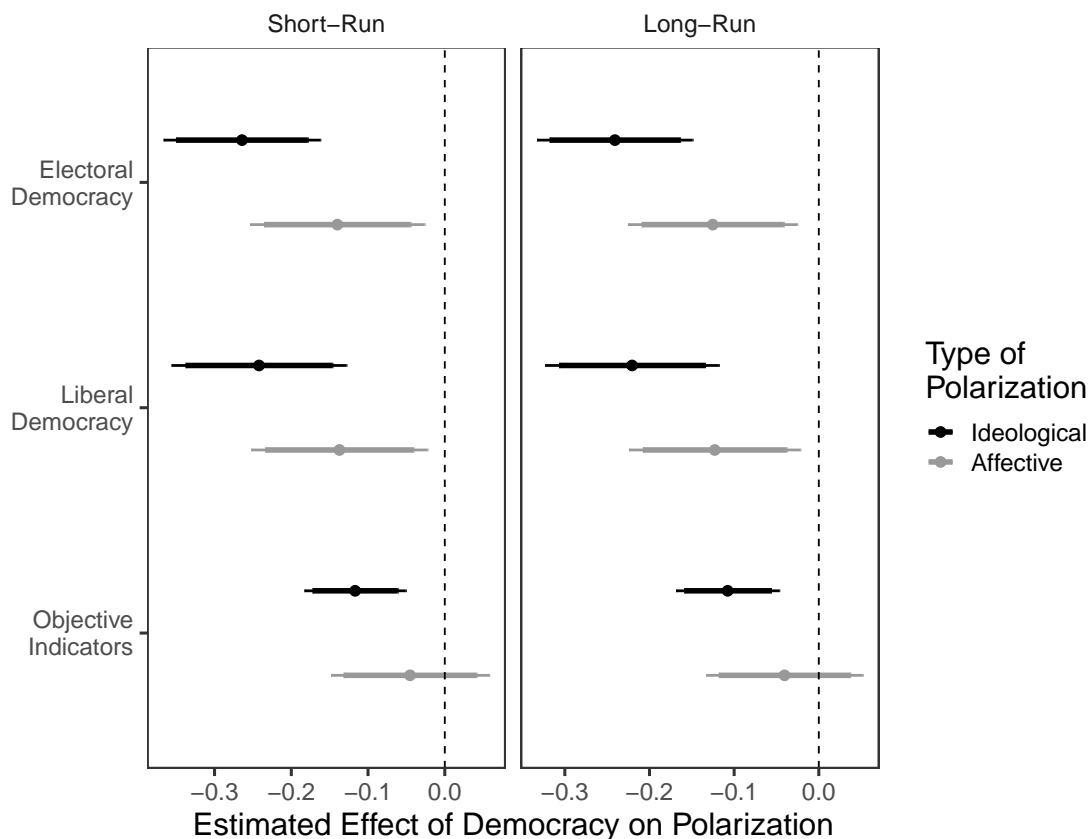


Figure 4: Short-Run and Long-Run Effects of Democracy on Polarization. Long-run point estimates are calculated using (6). Error bars give 90% and 95% confidence intervals.

slightly in perpetuity. In sum, the preponderance of evidence appears more consistent with mass polarization being causally downstream from democratic backsliding rather than the reverse.

Separating Within- and Between-Country Variation

That a relationship appears in cross-sectional analyses but not in panel models suggests prior findings may primarily reflect variation *between* countries rather than *within* them. To evaluate this possibility, I estimate a multivariate random intercept cross-lagged panel model (RICLPM). This model decomposes longitudinal relationships into stable between-unit associations and dynamic within-unit variation (Hamaker et al. 2015). It also allows for a fully specified system of causal

relationships, including autoregressive structures and reciprocal causation (Lüdtke and Robitzsch 2022).¹⁴

Figure 5 displays a path diagram of the RICLPM, with similar notation to Figure 1. The model estimates latent variables for polarization and democracy at each time point, represented by \tilde{p}_{ct} and \tilde{d}_{ct} , respectively. These latent variables are informed by the observed data p_{ct} and d_{ct} , plus covariates X_{ct} (omitted from the diagram) and random error ε . Also informed by observed data are random intercepts for both polarization (RI_p) and democracy (RI_d). As in Figure 1, solid black and gray arrows denote causal quantities of interest. The dotted arrow represents the covariance between random intercepts, and dashed arrows show all other relationships.

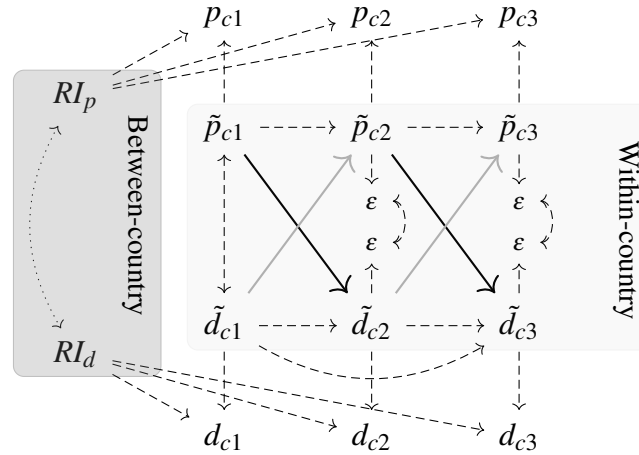


Figure 5: Path Diagram of Random Intercept Cross-Lagged Panel Model. Solid arrows represent causal quantities of interest, dashed arrows represent other relationships among variables, and dotted arrow represents correlation between random intercepts. Tildes denote latent variables and ε is random error. Covariates omitted from diagram.

This visualization clarifies how the RICLPM decomposes between- and within-country variation and allows me to directly assess the type of relationships cross-sectional research has identified. By fully specifying all time trends related to polarization and democracy within each country, I can evaluate both causal relationships after adjusting for between-country variation. In addition to allowing for reciprocal causation, this feature of the model provides a valuable check on

¹⁴See Barrett et al. (2024) and Prati (2024) for applied examples.

the results presented above. At the same time, the random intercepts themselves capture stable, country-level traits related to polarization and democracy. By estimating the covariance between those two sets of random intercepts, I can measure the cross-sectional relationship while allowing for within-country changes.

I allow direct correlation between polarization and democracy at $t = 1$ and correlation between random errors for all $t > 1$. Autoregressive and cross-lagged coefficients are fixed to be equal across all years. I assume the same temporal structure as in (2) and (3) and use the same two sets of covariates from those models, one associated with polarization and the other with democracy. However, the RICLPM estimates a large number of parameters, and that number grows quickly with each additional time period. To avoid overparameterization, I only fit these models to the final ten years of data (2010-2019)—a time period that nevertheless saw meaningful fluctuations in democratic quality around the world (e.g. Lührmann and Lindberg 2019). The Supplementary Information displays substantively similar results using the full time series but no covariates.

Table 3: Quantities of Interest from Random Intercept Cross-Lagged Panel Models

	Electoral		Liberal		Objective	
	Ideological	Affective	Ideological	Affective	Ideological	Affective
	(1)	(2)	(3)	(4)	(5)	(6)
$p_{t-1} \rightarrow d_t$	0.005* (0.000)	0.007* (0.000)	-0.003* (0.000)	0.005* (0.000)	-0.000 (0.000)	-0.024* (0.000)
$d_{t-1} \rightarrow p_t$	-0.083* (0.026)	-0.195* (0.048)	-0.127* (0.046)	-0.271* (0.041)	0.007 (0.005)	0.010 (0.001)
$\text{Cov}(RI_p, RI_d)$	-0.306* (0.067)	-0.077 (0.050)	-0.273* (0.070)	-0.077 (0.052)	-0.153* (0.044)	-0.035 (0.027)

Note: * $p < 0.05$. Values in parentheses give standard errors. All real-valued variables unit-normalized. Several estimates round to zero; Supplementary Information reports results with greater precision.

The results in Table 3 indicate three main patterns. First, results for cross-lagged effects of polarization and democracy largely comport with those from previous analyses. The effect of

polarization on democracy is minimal in most models. Most coefficients are statistically significant and some are even in the opposite direction of what one would expect. However, excepting the effect of affective polarization on objective indicators, effect magnitudes are so small that they are not substantively meaningful. Again, similar to previous results, decreases in democracy are consistently associated with increases in both ideological and affective polarization. Since both variables are unit-normalized and estimated in the same model, the effect magnitudes are more comparable than in the models above, which identified only one causal relationship at a time. In all models of electoral and liberal democracy, the effect of backsliding on polarization far outstrips the reverse effect. Models of objective democratic indicators are again the outliers, an observation on which I reflect below.

Second, ideological polarization and democratic backsliding tend to covary across countries, and this common co-occurrence could be driving some correlational results observed in both quantitative and qualitative work, including the analyses above. All six models exhibit negative covariance between the two sets of random intercepts—one absorbing stable, country-level polarization levels and the other democracy levels—and those covariances are statistically significant in all three models including ideological polarization. Despite the covariances being relatively large, however, they still do not drown out the within-country effect of backsliding on polarization.

Third, a different dynamic appears to be at play in models of affective polarization. Although those covariances still carry negative signs, they do not achieve statistical significance at the $p < 0.05$ level. Instead, more variation appears to be absorbed by the within-country effects. In the case of electoral and liberal democracy, the effect of backsliding on polarization is larger than in models of ideological polarization. This suggests any observed association between democracy and affective polarization is, in fact, being driven by a causal relationship linking the former to the latter. In the case of objective indicators, on the other hand, the association between democracy and affective polarization is more likely being driven by the reverse causal relationship. The effect of polarization on democracy in this model is more than triple the size of the coefficient from any other model.

Discussion

The marquee takeaway from this study is that mass polarization contributes little to democratic backsliding. Rather, democratic declines appear robustly related to subsequent mass polarization. It is important to consider what this finding does and does not imply, especially since the effect of decreasing levels of democracy is so much more drastic on ideological than affective polarization. Does democratic backsliding lead the average citizen to adopt progressively more extreme policy positions qua policy positions? I suspect not. It seems more likely that an episode of democratic backsliding drives a wedge between parties or other factions, resulting in a political system divided over the very meaning of democracy, how to fix it, and whether it needs fixing at all. This disagreement over democracy then gets reflected in ideology at the elite and mass levels,¹⁵ as parties and individuals align their ideas on the issues with their understanding of democracy and the role of the state. The result is a party system and mass public which increasingly and more consistently identify with “left” or “right.”

I see at least two potential reasons for this: First, citizens’ policy positions become more aligned with their overarching ideology, driven by their conception of democracy. Second, ideological labels become more salient, and parties and individuals apply them to delimit group boundaries and reflect political identities (Conover and Feldman 1981; Vegetti and Širinić 2019). In sum, democratic backsliding likely does not cause individuals to move to the extremes on any given issue, but it may set off a cascade of increasing ideological salience and alignment driven by elite messaging.

The objective democratic indicators give some sense of where greater democratic breakdown fits into the picture. In several ways, the models of this variable are the exception to the rule. One interpretation of these idiosyncracies is that the objective approach to measuring democracy simply produces noisy measures that do not capture backsliding in a meaningful sense (Knutsen et al. 2024). I advocate for a more circumspect interpretation that is sensitive to the type of democratic change each indicator tends to capture. V-Dem indices are the best suited for detecting the gradual

¹⁵On conflict extension, see Layman and Carsey (2002) and Layman et al. (2010).

degradations that characterize contemporary backsliding. Objective indicators are more appropriate for detecting large, sudden institutional changes that are more likely to differentiate one regime from another, rather than variations in one regime type (Miller 2024).

Results from these models therefore suggest that ideological polarization is causally downstream from subtle electoral manipulation and executive aggrandizement. However, the fact that substantial variation is still explained by between-country covariance indicates that both ideological polarization and backsliding could be slow-moving, unfolding over a long period and therefore likely to be observed together. Affective polarization is also causally downstream from backsliding, but the effect is much stronger and entirely explained by within-country dynamics. The story of institutional breakdown—the type of variation most likely to be detected by objective indicators—is a bit different. Ideological polarization still co-occurs with major democratic breakdown, but neither causes the other. Affective polarization, by contrast, makes breakdown more likely. To integrate all pieces of the puzzle: It is possible that backsliding attempts by elites spur ideological polarization in the mass public, affective polarization develops as divides continue to fester, and institutions dissolve shortly thereafter.

Why, then, do so many tests appear to find the opposite? The simple answer is that most studies of polarization and democracy identify—correctly—a *correlation* between the two phenomena but are unable to establish causation, due to a variety of methodological challenges. Most comparative evidence comes from a handful of in-depth case studies or cross-sectional analyses, which often struggle to capture enough temporal variation to establish causation. Behavioral tests—even careful experimental ones—have little to say about macro-level trends. Researchers drawing a causal arrow directly from micro-level party affect and democratic attitudes to macro-level democratic institutions risk ecological fallacy. Democratic support may help democracy survive (Claassen 2020), but micro-level studies are not equipped to draw such a conclusion. Further, they are almost always conducted in politically polarized countries, where even individuals with low party affect, for example, exist in and are psychologically calibrated to a polarized political environment. It is therefore difficult, at best, to know how these citizens would behave in a more politically congenial

context.¹⁶ This is not to say the findings of behavioral studies are spurious, but without variation in levels of polarization over time or across political contexts, it is difficult to know how those results generalize to real-world settings.

Also noteworthy is my deliberate isolation of mass polarization from other forms, such as elite or party system polarization. Although I conclude that mass polarization contributes little to backsliding by itself, I cannot draw any conclusions about other forms. Rostbøll (2025) points out that polarization is a complex, multifaceted phenomenon; scholars should remain sensitive to the type, content, process, and context of polarization in order to fully understand its impact. It is possible, for instance, that mass polarization on salient issues follows elite polarization (Cinar and Nalepa 2022). In such cases, backsliding could still be driven by the elite form of polarization or by some dynamic arising from the combination of elite and mass forms. Future work should assess these eventualities as well as causal mechanisms, institutional structures that enable or disable the operation of those mechanisms, and moderating variables which may make democratic backsliding more or less likely to lead to polarization and vice versa.

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¹⁶Simonovits et al. (2022) thoughtfully grapple with this challenge.

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