
WORKING PAPER
N. 226
JUNE 2024

A Popular Backlash Against Globalization?

Italo Colantone

Gianmarco Ottaviano

Piero Stanig

This Paper can be downloaded without charge from The Social Science
Research Network Electronic Paper Collection



**Università
Bocconi**

BAFFI
Centre on Economics,
Finance and Regulation

A Popular Backlash Against Globalization?

Italo Colantone* Gianmarco Ottaviano† Piero Stanig‡

June 18, 2024

Abstract

Is there a popular backlash against globalization? When did it start and in which forms? What do we know about its causes? We address these questions in the context of advanced democracies. We see the “globalization backlash” as the political shift of voters and parties in a protectionist and isolationist direction, with substantive implications on governments’ leaning and enacted policies. We discuss the empirical evidence on the backlash. We develop a theoretical discussion within the framework of the crisis of embedded liberalism. We nest within this framework theoretical results from international economics showing how the backlash may arise within standard trade models when considering the “social footprint” of globalization. These theoretical insights are consistent with available empirical evidence pointing to the role of globalization as a driver of the backlash. Yet, globalization is only one of the drivers of the backlash. There are other economic factors playing a similar role, such as technological change, fiscal austerity, and immigration. Moreover, cultural concerns such as status-threat, authoritarianism, and nativism do play a relevant role, with a significant interplay with economic drivers. This calls for a broad and comprehensive approach to the backlash, both from an academic and from a policy making perspective.

*Bocconi University, Baffi Research Centre, CESifo and FEEM, Via Roentgen 1, 20136 Milan, Italy. Contact: italo.colantone@unibocconi.it.

†Bocconi University, Baffi Research Centre, CEP, CEPR and IGIER, Via Roentgen 1, 20136 Milan, Italy. Contact: gianmarco.ottaviano@unibocconi.it.

‡Bocconi University, Yale-NUS, and NUS, Via Roentgen 1, 20136 Milan, Italy. Contact: piero.stanig@unibocconi.it.

1 Introduction

Is there a popular backlash against globalization? When did it start and in which forms? What do we know about its causes? In this contribution, we address these questions both from a theoretical and from an empirical perspective, in the context of industrialized advanced democracies.

Based on [Colantone *et al.* \(2022\)](#), we start by defining the “globalization backlash” as the political shift of voters and parties in a protectionist and isolationist direction, with substantive implications on government stances and enacted policies. We then provide descriptive evidence on the backlash across 23 advanced democracies. We show that the backlash has been driven by rising support for globalization-skeptical forces both on the left and on the right of the political spectrum, especially radical right and radical left parties.

Important changes within the electoral arenas of Western democracies have taken place over the past decades. In particular, the mainstream social-democratic, Christian-democratic and conservative parties that dominated electoral politics in the second half of the 20th century have been progressively losing ground. In Europe, the enthusiasm for the European Union project has been replaced by significant amounts of Euroskepticism, as manifested by the success of explicitly anti-EU political forces. In recent years, some highly salient episodes, such as the victory of Donald Trump in the U.S. presidential race, and the success of the Leave option in the Brexit referendum, have attracted considerable attention also from outside the social sciences. Yet these phenomena belong to a set of more general shifts that have been brewing for decades and were traditional objects of study in political science and political sociology.

One way in which these processes have been understood in the literature is through the lens of populism, a remarkable feature that characterizes many political forces whose electoral support has surged over the past three decades. In the classic definition of [Mudde \(2004\)](#), populism is “a thin-centered ideology that considers society to be ultimately

separated into two homogeneous and antagonistic groups, ‘the pure people’ versus ‘the corrupt elite’, and which argues that politics should be an expression of the *volonté générale* (general will) of the people”. By embracing a manichean distinction between people and elite, populist parties ultimately reject pluralism—as the pure people are homogenous—and express discomfort, at times very deep and very explicit, with the institutions of representative democracy. This general approach to political and social conflict can be then articulated in various forms, both on the right, with an ethnonationalist and nativist spin, and on the left, with a more anti-capitalist rhetoric. Importantly, in both of its present articulations, a critique of economic globalization and its institutions, and, within Europe, of the EU itself, is present. In this respect, the globalization backlash is an important phenomenon connected to the broader populist wave that has been documented in recent years.

We discuss the causes of the globalization backlash. First, based on theoretical work in international economics, we discuss the distributional consequences of trade liberalization and the idea of “social footprint” of globalization introduced by [Colantone *et al.* \(2022\)](#). We then discuss the empirical evidence on the distributional consequences of international trade. The guiding intuition is that economic globalization produces winners and losers, opening social cleavages that translate into political transformations. Classic work in political science (e.g., [Betz, 1993](#), [Kriesi, 1998](#), [Swank and Betz, 2003](#), [Zaslove, 2008](#)) had long noticed that the increasing success of the radical right was linked to voters “left behind” in the new global order. The cleavage theory approach, in particular, has provided many insights on this phenomenon. [Kriesi *et al.* \(2006, 2012\)](#) focus on the conflict between globalization “winners” and “losers”; along the same lines, [Hooghe and Marks \(2018\)](#) relate the changes in the electoral arenas of western Europe to the emergence of a new cleavage, which they call “transnational”, defined by the conflict between those who experience net benefit or net harm from globalization. [Bornschieer \(2018\)](#) provides a useful roadmap to this literature. Some recent empirical contributions (e.g., [Langsæther and Stubager, 2019](#);

Ollroge, 2023) have tried to question the central messages of the globalization cleavage approach; yet, in our view, the evidence they present does not seem to be strong enough to warrant the somewhat sweeping conclusions they draw. The line of research on the globalization cleavage remains active. For instance, in a very recent contribution, Polk and Rosén (2024) study the supply side of trade protectionism in the context of cleavage theory, complementing the demand-side empirical work that we will discuss.

Initially, as Golder (2016) remarked, who exactly the “losers” from globalization or modernization were was left somewhat undefined. More recent work has documented a causal effect of globalization shocks, especially in terms of import competition from China and other emerging economies, on the success of parties proposing economic nationalist platforms, and radical right parties more specifically (e.g., Colantone and Stanig, 2018c and Colantone and Stanig, 2018b). Overall, taking stock of the literature, globalization of trade emerges as an important driver of the globalization backlash, at least in its right-wing manifestation.

Yet, we discuss how trade globalization is not the only driver behind the surge of anti-globalization forces, whose success depends on a variety of factors. Immigration plays a significant role, both on its own and as a catalyst for other economic shocks. Technological change, especially in the form of robotization in manufacturing, seems to have produced distributional and political consequences that are similar to those of economic globalization. Overall, structural changes in the economy tend to open cleavages that are politically consequential and push voters in an anti-globalization direction. In Europe, an important role has also been played by exposure to fiscal austerity in the aftermath of the financial crisis of 2008. Importantly, this seems to explain the success of (radical) left globalization-skeptical parties, which is not explained by trade globalization shocks.

In the context of the austerity programs imposed by the EU, but also beyond them to encompass a broader set of policy areas, some more purely political facets of globalization are worth recognizing. In particular, many have pointed out that the EU might have a

“democratic deficit” (e.g., [Norris, 1997](#)), and have linked this to the success of populist parties (e.g., [Berman, 2019](#); [Mudde, 2021](#)). More in general, non-majoritarian institutions such as central banks, constitutional courts, and international organizations, have locked in liberal policies in consolidated democracies, and authoritarian populism may be seen as a reaction to a visible cosmopolitan bias in policymaking ([Zürn, 2022](#)). The intrusiveness of institutions underpinning the liberal global order leads to contestation, that might take different forms in different contexts ([Börzel and Zürn, 2021](#)). In advanced democracies, electorates might sense that decisions are in the hands of global market forces or supra-national entities, with little room for national governments to steer domestic outcomes. Hence, nationalist promises to “take back control” from these distant forces resonate with voters.

We also discuss how economic factors interplay with cultural factors. As a matter of fact, a popular reading of the globalization backlash is in terms of a cultural backlash (e.g., [Norris and Inglehart, 2019](#) and [Mutz, 2018](#)). Cultural concerns related to status threat, authoritarianism and nativism are important connotations of anti-globalization shifts in voting, especially when we consider radical right supporters. Contrary to some of the literature, we do not see economic and cultural explanations of the backlash as opposite and mutually exclusive. Instead, we see them as complementary and mutually reinforcing. In fact, changes in cultural attitudes constitute an important mechanism through which economic shocks may translate into voting behavior. In turn, as suggested by [Margalit \(2019\)](#), cultural concerns may raise the political salience of economic shocks. Overall, a thorough understanding of the globalization backlash entails considering several economic phenomena, not just trade globalization, as well as cultural shifts in society, changes in the level at which political decisions are made, and constraints imposed on domestic politics by globalization itself. As suggested by [Colantone et al. \(2022\)](#), an effective description of the globalization backlash may be conveyed through the medical concept of “comorbidity”, by which different factors contribute to determine the phenomenon under study.

In closing, it is important to clarify that the aim of this contribution is not to provide a comprehensive overview of the recent literature on the globalization backlash, which can be found in annual review contributions such as [Rodrik \(2021\)](#) and [Walter \(2021\)](#), as well as in [Colantone *et al.* \(2022\)](#) and in the special issue edited by [Mansfield *et al.* \(2021\)](#). What we aim to do in this article is to provide our own perspective on these issues, sketching a roadmap of contributions in which the authors were directly involved. These contributions are extensively nested in the broader literature context, but without the ambition of a comprehensive review, which would be beyond the scope of this paper.

The remaining of the paper is structured as follows. In Section 2 we document the globalization backlash. In Section 3 we discuss the economics of the backlash and in Section 4 we discuss its politics, while in Section 5 we focus on comorbidity. Finally, Section 6 concludes.

2 Documenting the globalization backlash

We start by showing empirical evidence on the globalization backlash from the mid-1990s onwards. This analysis borrows from [Colantone *et al.* \(2022\)](#). We focus on three main dimensions, which, in democracies, are closely connected: voting behavior and the distribution of policy stances in legislatures and among executives. The analysis covers 23 industrialized democracies in western Europe, north America, east Asia, and the Pacific, from 1980 to 2019.¹

As a first step, we need to characterize policy platforms in terms of globalization stances. To this purpose, we rely on data from the Manifesto Project ([Volkens *et al.*, 2016](#)), which provides human-coded counts of the statements made by parties in their electoral programs on a comprehensive range of issues, including international trade and multilateralism. Each

¹These are: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, South Korea, Spain, Sweden, Switzerland, United Kingdom, United States.

statement in the official election manifesto of each party is attributed to one issue area, and its polarity (e.g., in favor or against a given issue) is recorded. From these data, one can build quantitative scores that reflect the position of political parties on specific policy issues. These are election-specific, hence the evolution of party stances can be traced over time.

Specifically, in line with earlier work by [Burgoon \(2009\)](#) and [Colantone and Stanig \(2018c\)](#), we measure parties' positioning on globalization through the Net Autarky Score. This is based on the difference between the number of claims in the party manifesto in a protectionist and isolationist direction and the number of claims in the opposite direction. Higher scores denote more protectionist and isolationist positions.² We center the scores on the long-term country median in order to eliminate permanent differences across countries in how the party system, overall, stands regarding globalization.

Importantly, the Net Autarky score takes into account not only a party's stance on narrow trade policy issues such as tariffs and export subsidies, but also broader views on sovereignty, multilateral relations, and the role of international organizations such as the WTO and the European Union. This richer characterization allows us to explore more thoroughly different important facets of the globalization backlash. In fact, this involves not only the success of plain protectionist platforms opposed to international trade, but also, in more general terms, stronger emphasis on national self-sufficiency and security, paralleled by growing skepticism with regard to supranational institutions and multilateral cooperation. We combine Net Autarky scores with party vote and seat shares in order to compute nation-specific summaries reflecting the political orientation of each country over time.

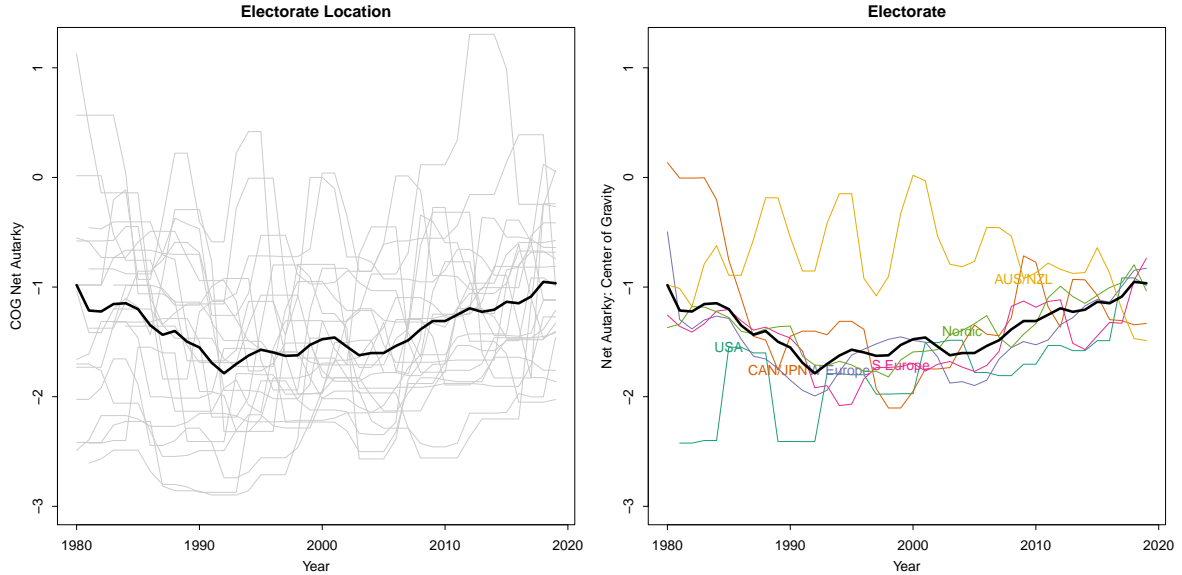
Figure 1 displays the location of the center of gravity of the electorate. Each grey line is a country, and the thick black line is the average across all 23 countries we consider. The center of gravity for each country is computed as the average of the Net Autarky scores of

²Specifically, following [Lowe et al. \(2011\)](#) we compute: $\text{NetAutarkyScore}_{pct} = \log(.5 + z_{pct}^+) - \log(.5 + z_{pct}^-)$, where z_{pct}^+ is the number of claims in the party manifesto in a protectionist/isolationist direction, and z_{pct}^- is the number of claims in the opposite direction.

the parties competing in each election, weighted by the vote shares they obtained. Data on vote shares are available from the Manifesto Project. The globalization backlash is evident in the ideological leaning of electorates towards globalization. When considering the average across countries, there is a decline in Net Autarky (globalist wave) from the early 1980s until the early 1990s, followed by a protectionist and isolationist shift from the mid-1990s onwards. The evidence suggests, then, that the globalization backlash in terms of voting behavior is not just a recent phenomenon: discontent has been mounting over the past three decades. The right panel of Figure 1 shows how similar patterns emerge when considering different groups of countries. The only relevant exceptions to the general pattern are Australia and New Zealand, whose historically higher levels of Net Autarky scores have been actually declining, on average, over the same period. Arguably, this may be related to the fact that these economies are strong in commodities exports. They have thus mostly benefited from the sharp growth of China (and other emerging economies) through what has been called the “commodity super cycle” of the 2000s, while at the same time the US and Europe, as we discuss later, were severely hit by the China shock in manufacturing.

Figure 2 displays the location of legislatures, where the difference with respect to Figure 1 is that we weight party Net Autarky scores by legislature seat shares instead of vote shares. Data on seat shares are from ParlGov (Döring and Manow, 2020). Vote and seat shares are different to the extent that electoral systems depart from perfect proportionality. In Figure 3 we consider the position of executives. In presidential systems or in single-party cabinets the executive Net Autarky score is simply the score of the ruling party. When the executive is backed by a coalition of parties, we take the weighted average of the net autarky scores of all the coalition partners, using as weights the shares of the legislative majority seats that each coalition partner commands. The evidence we obtain is very similar across the board. Overall, the globalization backlash from the mid 1990s onwards is not only evident in terms of electorate positioning, but seems to be consequential also when we consider the

Figure 1: Electorate Location



Source: Own calculations based on Manifesto Project data. Adapted from Colantone *et al.* (2022).

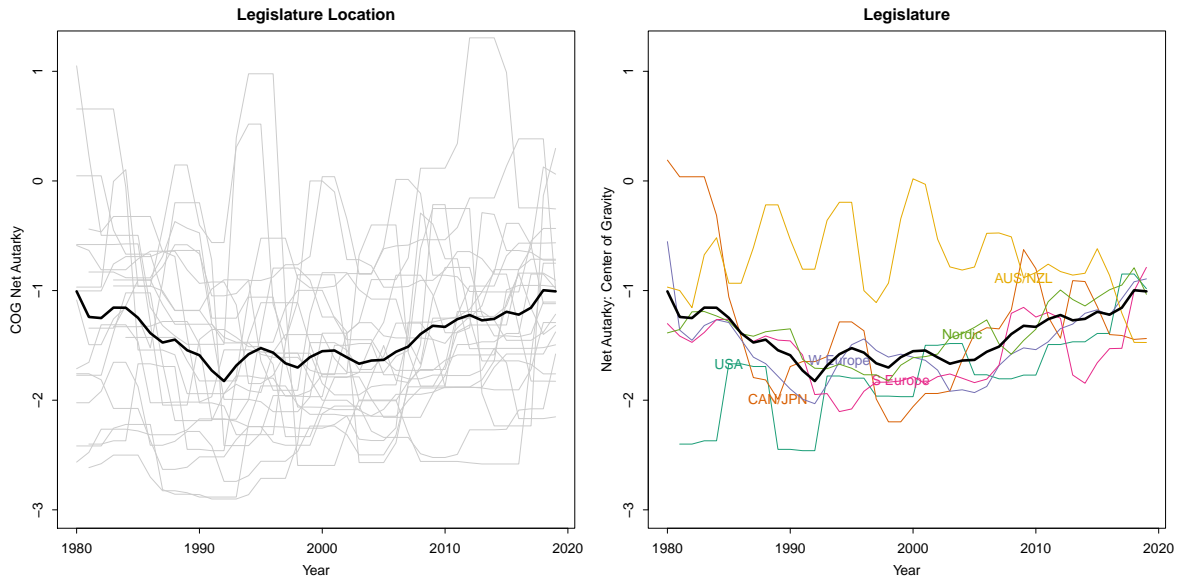
Note: Both panels report figures referring to the electorate center of gravity in terms of Net Autarky scores. In the left panel, the light grey lines refer to each single sample country; the thick black line is the cross-country average. In the right panel, we display separately specific countries and groups of countries; the thick black line is the cross-country average.

composition of legislatures and the leaning of executives.

In Figures 1-3, the center of gravity remains in the negative range in many countries, and on average across all countries. This indicates that, on average, electorates, legislatures, and executives remain, broadly speaking, in the pro-globalization camp, even if the weight of relatively more protectionist and isolationist parties increases over time. While the center of gravity is informative about the location of the entire distribution of the electorate and legislators, it does not provide direct information about the weight of outright anti-globalization forces. For this reason, we now investigate which types of parties drive the globalization backlash.

To this purpose, in Figure 4 we locate parties in a two-dimensional policy space defined by Net Autarky scores, on the vertical axis, and left-right position in terms of domestic economic policy on the horizontal axis. The economic left-right index is computed based on Manifesto Project data through the same method used for Net Autarky. In this case we consider the number of statements in the electoral manifesto that are in favor or against

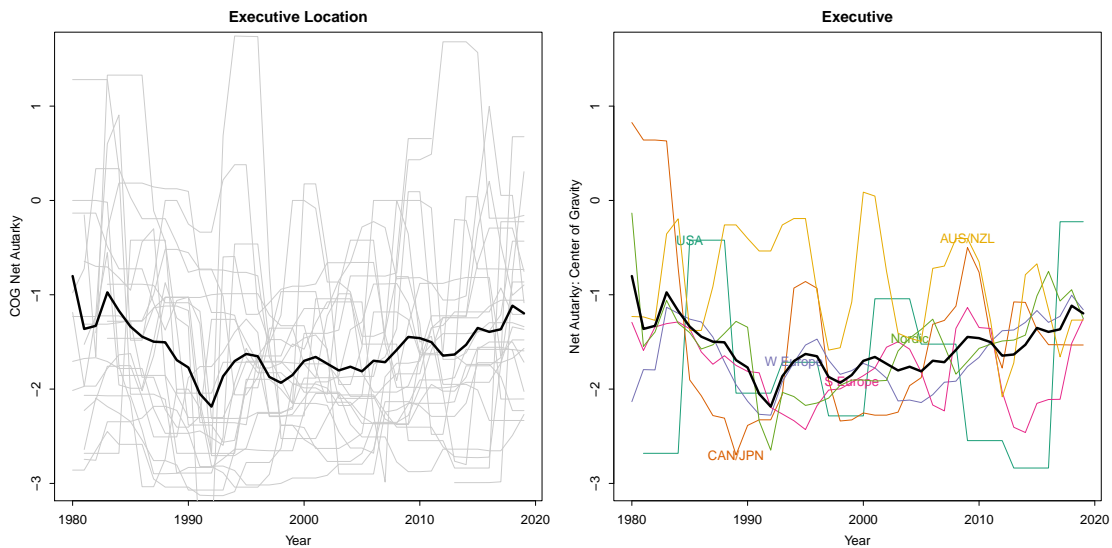
Figure 2: Legislature Location



Source: Own calculations based on Manifesto Project and ParlGov data. Adapted from Colantone *et al.* (2022).

Note: Both panels report figures referring to legislature center of gravity in terms of Net Autarky scores. In the left panel, the light grey lines refer to each single sample country; the thick black line is the cross-country average. In the right panel, we display separately specific countries and groups of countries; the thick black line is the cross-country average.

Figure 3: Executive Location



Source: Own calculations based on Manifesto Project and ParlGov data. Adapted from Colantone *et al.* (2022).

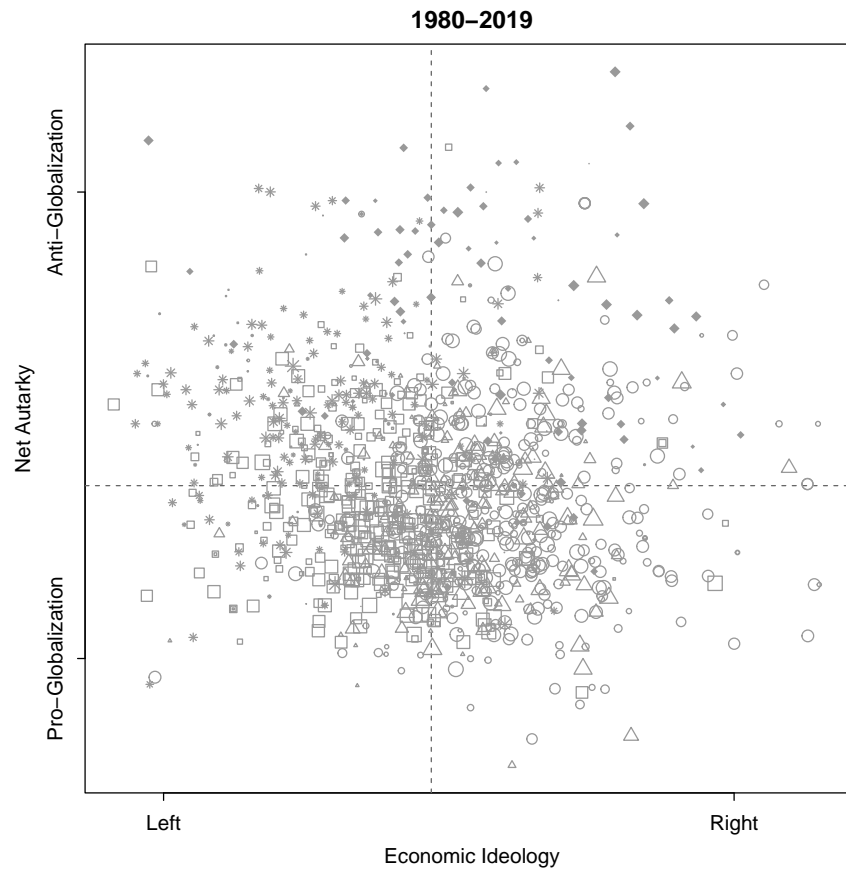
Note: Both panels report figures referring to executive center of gravity in terms of Net Autarky scores. In the left panel, the light grey lines refer to each single sample country; the thick black line is the cross-country average. In the right panel, we display separately specific countries and groups of countries; the thick black line is the cross-country average.

redistribution and the welfare state, trade unions, Keynesian demand management policies, and regulation of economic activity. Higher scores denote more right-wing, conservative positions. The dashed lines split the graph into four quadrants, based on the (country-specific) long-term median positions on the two policy dimensions. For instance, parties in the upper quadrants are characterized by more protectionist and isolationist platforms compared to the long-term median within their country. These parties can have more left-wing or right-wing positions when it comes to domestic economic issues. Protectionist and isolationist parties with economic conservative stances fall in the “economic nationalist” camp (upper-right), while parties supporting redistributive policies fall in the “isolationist left” camp (upper-left). In the lower quadrants, pro-globalization and pro-redistribution parties fall in the “pro-trade left” camp (bottom-left). Pro-globalization and economic conservative parties, which basically follow the tenets of classical liberalism, supporting markets both domestically and in matters of international trade, fall in the “pro-trade right” camp (bottom-right).

In the plot, we combine the information about policy positions with information about the historical affiliation of political parties with various party families. Specifically, triangles refer to Christian-democratic parties, typically found on the economic center-right. Squares are socialist and green parties, usually found on the economic left, as are communist parties, identified by asterisks. Hollow dots are liberal and conservative parties, typically found on the economic right. Finally, solid diamonds denote radical-right parties, identified as in [Colantone *et al.* \(2022\)](#) based on the conventional wisdom in the political science literature. In general, parties that are classified as radical right tend to display three characteristics: (1) radicalism, meant as a criticism of the established order and institutional checks and balances; (2) exclusionary nationalism and nativism; and (3) populism, expressed as a rejection of pluralism and elitism ([Golder, 2016](#)).

The main message emerging from Figure 4 is that relatively anti-globalization parties—located in the upper quadrants—can lean both to the left and to the right of center when it

Figure 4: Party Groups



Source: Own calculations based on Manifesto Project data. Adapted from Colantone *et al.* (2022).

Note: Each data point is one party in one election between 1980 and 2019, in 21 countries (all but Australia and New Zealand). Triangles refer to Christian-democratic parties; squares are social-democratic and green parties; asterisks are communist and radical socialist parties; hollow dots are liberal and conservative parties; solid diamonds are radical-right parties. The size of each symbol is proportional to (log) national vote share.

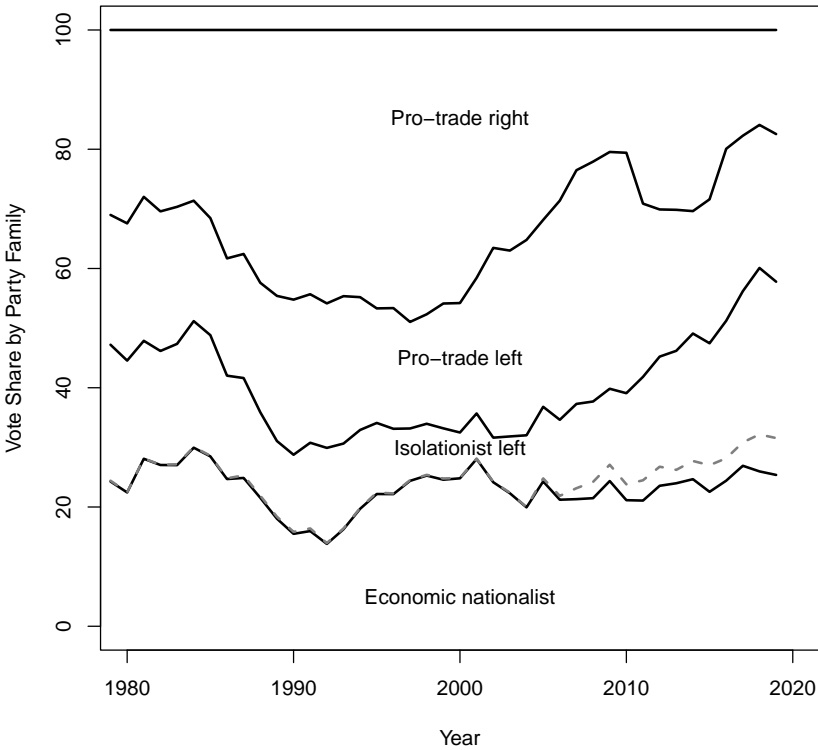
comes to domestic economic policy. In particular, the combination of a laissez-faire and anti-redistributive approach on domestic issues with protectionism and isolationism in international affairs—the protectionist right—is actually quite common. This type of policy platforms has been characterized as “economic nationalism” (Colantone and Stanig, 2018c) and it is typical—albeit not exclusive—of radical right parties, most of which are indeed located in the upper-right quadrant of the graph.

Figure 5 shows the evolution of support for different party groups over time. Specifically, the lines in the graph display cumulative vote shares for the four party groups, in this order from bottom to top: economic nationalists (upper-right quadrant), isolationist left (upper-left quadrant), pro-trade left (bottom-left quadrant), and pro-trade right (bottom-right quadrant). We compute the cumulative vote share of parties belonging to each quadrant, and report the 5-year rolling average for each group across countries.³ To illustrate, the lowermost line displays the vote share for protectionist right parties (the area labeled “Economic nationalist”); the distance between the first line and the second line (the area labeled “Isolationist left”) is the vote share for the isolationist left, and so on up until reaching 100 percent of votes cast.

Consistent with the evidence presented above, the globalization backlash is pretty evident from the early 1990s onwards. The combined vote share for right- and left-wing protectionist parties almost doubles, rising from around 30 to about 60 percent. Such a surge is primarily driven by right-wing parties until the financial crisis. Later, we observe a significant increase in support for the protectionist left, with the most prominent examples coming from southern Europe: Podemos in Spain, Syriza in Greece, and the Five Star Movement in Italy. Nevertheless, economic nationalist parties keep performing very well even after the crisis, especially considering that the dashed grey line refers to radical right parties that move to the left of the median in terms of economic ideology.

³We use the 5-year rolling average as data on policy stances are only observed in election years. We then take into account on average one election per each sample country, thus minimizing the time variation due to compositional effects, as in any given year the set of countries holding elections differs.

Figure 5: Electoral Dynamics by Party Groups



Source: Own calculations based on Manifesto Project data. Adapted from Colantone *et al.* (2022).

Note: The figure displays the cumulative vote share of economic nationalists, plus the isolationist left, plus the pro-trade left, plus the pro-trade right. The dashed grey line refers to radical-right parties located to the left of the median in terms of economic ideology. The lines display five-year moving averages of vote shares by ideological group in all countries covered by the analysis.

Taking stock of the evidence reviewed in this section, we can conclude that the globalization backlash is not a recent phenomenon, as it has been mounting over the past three decades. It is primarily driven by support for right-wing economic nationalist parties in the first phase, with a notable increase in backing for the isolationist left after the financial crisis. Importantly, the globalization backlash does not only emerge in terms of voting behavior, but has tangible implications on the stance of legislatures and executives. This has important consequences for international trade policy, cooperation, and the functioning of democratic institutions.

While there is a clear protectionist and isolationist shift in electorates, legislatures, and executives, the evidence on protectionism in public opinion reported in [Walter \(2021\)](#) and [Colantone *et al.* \(2022\)](#) does not point to a clear and generalized rise of autarkic preferences among citizens. This opens an important question: can we really talk about a globalization backlash in a situation in which support for relatively protectionist parties grows, but in the absence of a protectionist shift in preferences? Overall, the globalization backlash, intended as the increasing success of parties proposing autarkic platforms, does not hinge upon a society-wide deterioration of the stances on globalization. It is instead related to the existence of persistent and widening differences on globalization stances across parties and groups of voters, with rising polarization and relatively more autarkic parties progressively garnering more electoral support.

3 The economics of the backlash: gains and pains from trade

Is trade globalization itself a cause of the globalization backlash? In this section, we assess this question both theoretically and empirically. We first sketch a conceptual discussion grounded in the theory of international economics, along the lines of [Colantone *et al.* \(2022\)](#). We discuss the distributional consequences of international trade and we

explain how the backlash may arise within standard trade models when taking into account the “social footprint” of globalization. These theoretical insights are then connected with the available empirical evidence pointing to the role of globalization of trade as a driver of the backlash. The underlying idea is that international trade produces distributional consequences that are highly consequential from a political point of view.

The existence of gains from trade is a central tenet of normative trade theory. The simple intuition is that trade liberalization opens new opportunities for economic agents, without closing old ones. Hence, opening a country to trade cannot make people worse off ([Dixit and Norman, 1986](#)). In the worst case, they would just be indifferent. More specifically, the core principles regarding gains from trade can be summarized as follows: (a) free trade is superior to autarky; (b) restricted trade (involving trade barriers) is better than autarky; and (c) for a small country (i.e., one lacking the ability to influence global prices), free trade is superior to restricted trade. However, for these propositions to hold, it is essential that both old and new opportunities remain available to all citizens. This universal affordability generally necessitates some form of income redistribution at the national level, which may be hard to implement in practice. Therefore, a key caveat to the unanimous desirability of trade liberalization is that redistribution is feasible. Without it, while the country as a whole may benefit, certain citizens may experience gains while others may face losses ([Helpman, 2018](#); [Pavcnik, 2017](#)).

As a matter of fact, the unequal consequences of trade constitute one of the most debated arguments against free trade. Intuitively, while opening up to trade generates welfare gains at the country level, by construction it involves deep distributional effects. In fact, the efficiency gains—i.e., the source of increased prosperity—come from the fact that each country can shed the sectors in which it is relatively less efficient, and specialize in comparative advantage activities. This implies that factors formerly employed in some sectors have to be reallocated elsewhere. In the presence of frictions to the reallocation of capital and labor, this process will create adjustment costs as long as the transition is not

complete. This may take a long time, and generate political discontent along the way.

Even abstracting from these adjustment costs, trade liberalization is also predicted to create long-run winners and losers. According to the Stolper-Samuelson theorem, factors of production that are used intensively in comparative advantage sectors, i.e., those that expand thanks to trade liberalization, will win. Conversely, factors of production that are used intensively in shrinking sectors will lose. To illustrate, along the lines of [Franzese \(2019\)](#), say we distinguish between owners of capital—be it physical, financial, or human—and owners of unskilled to moderately skilled labor. In advanced economies, which constitute the focus of our study, capital is the relatively abundant factor, while unskilled labor is relatively scarce. As these economies get increasingly open to trade with labor abundant countries such as China, owners of capital are expected to win, while unskilled workers are expected to lose. In the absence of effective redistribution, this rise in inequality may breed political backlash.

The political consequences of trade-induced inequalities may be exacerbated by the fact that losers tend to be geographically concentrated in regions that were historically specialized in labor-intensive manufacturing industries. Losses of firms and employment in manufacturing may then create broader repercussions in the local economy, due to lower demand for both manufacturing and services inputs, as well as lower demand for final goods and services. This type of self-reinforcing dynamics may trigger spirals of long-term regional decline, with ensuing political repercussions.

When thinking about the costs associated with reallocating productive factors there is also a more profound dimension to consider. This is related to the fact that some sectors may be “strategic” for a country. That is, they may produce positive economy-wide externalities in a number of ways, related for instance to the security of countries, but also more generally to the wellbeing of people. Think for example of manufacturing industries that used to provide not only secure and well-paid jobs, but also a sense of identity, self-esteem, and purpose for entire communities. When trade liberalization leads to losses in strategic

industries, such positive externalities are lost. To articulate it plainly, reallocating productive factors across sectors and geographic regions leaves us with a different world, a world in which some social segments and communities may find themselves out of place.

This transformed landscape can be conceptualized as a “social footprint” of globalization entailing long lasting scars. Trade gains come with “pains from trade” related to the losses of positive externalities. [Colantone *et al.* \(2022\)](#) show that, once such costs are taken into account within standard trade models, full trade liberalization may not be optimal. Countries may be actually better off with some degree of protectionism. If this optimal degree of protectionism is higher than the current one, a globalization backlash could then be consistent with welfare maximization. From a political point of view, the backlash becomes more likely if segments of the population that hold more negative appreciations of the pains from trade acquire more political influence, for instance because they are concentrated in key contestable electoral districts.

Taking stock of the theoretical discussion, we have seen how trade liberalization can trigger economic and social dynamics that may generate a globalization backlash. Essentially, these dynamics are related to the distributional consequences induced by trade, and to the losses of positive externalities in the economy. These go beyond short-lived adjustment costs, and may entail a long lasting social footprint of globalization that is consequential in terms of politics and policy making.

The empirical literature has provided abundant evidence on the distributional consequences of trade. In particular, starting with the seminal work by [Autor *et al.* \(2013\)](#), a large stream of studies has exploited the surge of import competition from China as a source of identification. In fact, China has witnessed a sharp economic transformation from the end of the 1980s onwards, moving from being a closed, mostly agricultural economy, to being the leading manufacturing exporter of the world. The rise of China has entailed growing competitive pressure for manufacturers in advanced countries, leading to plant closures, and job and wage losses. These losses were disproportionately felt in manufacturing regions

historically specialized in industries that have witnessed sharper increases in imports from China afterwards, e.g., textiles and electronics. In line with theoretical expectations, the impact was stronger for unskilled workers, who have been shown to face permanent income losses (Autor *et al.*, 2014). Similarly, negative effects seem to be long lasting also at the regional level, as trade exposed regions have kept underperforming compared to relatively sheltered ones (Autor *et al.*, 2021, Broz *et al.*, 2021 and Colantone and Stanig, 2018b). Importantly, the consequences of trade exposure have been found to reach beyond economic losses, with negative implications also in terms of family dynamics (Autor *et al.*, 2019), crime (Dix-Carneiro *et al.*, 2018), the provision of local public goods (Feler and Senses, 2017), social mobility (Colantone *et al.*, 2023), as well as health and mortality (Adda and Fawaz, 2020, Colantone *et al.*, 2019 and Pierce and Schott, 2020).

We refer the reader to Autor *et al.* (2016) and Redding (2022) for a broader review of this literature. Here, we just notice how the available studies support the existence of distributional effects of trade that seem to be sizeable and long lasting. We started this section asking whether globalization of trade can be seen as a cause of the globalization backlash. We have seen that theory and empirical evidence suggest that trade generates economic and social dynamics that can be politically consequential and lead to globalization backlash. In the next section, we describe such political implications.

4 The politics of the backlash

In the second half of the 20th century, Western democracies adopted a model that ultimately implemented the basic idea that the prosperity created by more open trade could be distributed broadly via government policy. The concept of “embedded liberalism” was introduced by Ruggie (1982) to describe the international economic order that emerged in Western democracies after World War II. Embedded liberalism combined postwar trade liberalization and multilateralism with policies aimed at fostering domestic economic

growth and safeguarding the domestic economy from external shocks to minimize their social consequences. In line with this argument, both [Cameron \(1978\)](#) and [Rodrik \(1998\)](#) found evidence of greater public spending in countries with higher levels of openness. It is well documented that policies in the spirit of “embedded liberalism” are effective: redistributive programs indeed reduce opposition to international trade ([Hays *et al.*, 2005](#)), as well as anti-incumbent and anti-globalization vote following trade shocks ([Margalit, 2011](#); [Rickard, 2023](#)).

In western Europe, the period from the 1950s onwards witnessed the realization of embedded liberalism through the creation of a customs union and a gradual progression towards the European single market. This single market guaranteed four “fundamental freedoms”: the free movement of goods, capital, services, and labor across member states. This process of economic integration culminated in the establishment of the Economic and Monetary Union in 1992 and the introduction of the euro as a single currency in 1999. In just half a century, a growing group of independent European nations achieved a level of economic integration and political cooperation previously unimaginable. Simultaneously, the European bloc played an active role in promoting globalization, both through multilateral initiatives like the General Agreement on Tariffs and Trade (GATT) and the World Trade Organization (WTO), and through bilateral trade agreements. In line with the embedded liberalism model, economic liberalization in Europe was accompanied by the development of comprehensive welfare state systems. This fusion of “liberal” economic policies and redistributive universal welfare provisions constituted the foundation of the traditional European “social market economy” model.

This arrangement made it possible to spread widely the benefits of the sustained economic growth experienced after World War II, and unsurprisingly it garnered broad political support. This support was evident in votes for mainstream parties across the political spectrum that promoted this model. At the same time, the United States achieved a comparable level of prosperity for a broad middle class through a somewhat different

policy mix, which included less public welfare and more measures to promote a dynamic labor market with sustained wage growth and contained income inequality.

The sustainability of the embedded liberalism model started encountering challenges in the 1990s, ultimately escalating into a full-fledged crisis from the Great Recession onwards (Hays, 2009, 2017). In a context of slower growth compared to the previous decades, industrialized countries were exposed to stronger trade shocks such as surging imports from China and other emerging economies. This would have called for even more compensation and redistribution policies, but these were difficult to implement. On the one hand, governments faced budget constraints that were partly due to a race to the bottom in corporate taxation driven by globalization (Egger *et al.*, 2019 and Tørsløv *et al.*, 2023). On the other hand, it was difficult to compensate manufacturing regions exposed to something as disruptive as the China shock. As a matter of fact, this would have involved not just unemployment benefits and other standard forms of cash transfers, but rather a complete turnaround of the economic model of these regions. Confidence waned both in governments' ability to formulate policies that foster economic growth, and in the adequacy of government policies to cushion the impact of structural economic changes. The rise in inequality observed in many countries eroded the credibility of the mainstream liberal model, undermining the promise underlying the social contract of embedded liberalism. Mainstream parties of the right and the left faced growing difficulties in convincing the electorate that globalization benefits everyone. As noticed by Frieden (2018), this was due not only to compensation failures, but also to issues of representation, as a significant portion of the electorate felt that mainstream parties failed to understand—let alone address—their problems.

In such a context, parties that could present themselves as alternatives to the status quo, when not explicitly anti-establishment, and articulate appealing anti-globalization platforms, had the opportunity to drive significant inroads in the electorate (Colantone and Stanig, 2019 and De Vries and Hobolt, 2020). Importantly, in order for this process to

unfold, it is not necessary that citizens recognize globalization, and its mismanagement by the domestic elites, as the ultimate causes of their economic malaise, nor that they embrace trade protectionism as a well-formed policy stance. Anti-incumbent vote may very well happen through “blind retrospection”(Achen and Bartels, 2017): what ultimately matters is voicing discontent with the current state of affairs.

The literature has provided ample evidence on the political effects of exposure to trade globalization. In the previous section, we have reviewed studies on the economic and social implications of the China shock. The same phenomenon has been exploited to investigate the political implications of globalization of trade. The underlying idea of these studies is that the distributional effects of trade exposure may be consequential in terms of voting behavior. Colantone and Stanig (2018c) show that western European regions that were more exposed to Chinese imports between 1988 and 2007, owing to their historical industry specialization, displayed higher support for protectionist, isolationist and nationalist parties, chiefly of the radical right. Colantone and Stanig (2018b) show that higher exposure to Chinese imports pushed UK regions to support relatively more the Leave option in the Brexit referendum of 2016. Both studies exploit individual-level data to show that voters’ response has a largely sociotropic nature. In fact, people seem to be responsive to trade shocks in their region of residence irrespective of their personal extent of exposure. The evidence points to a community-level reaction to economic distress driven by globalization.

Several other studies have provided similar evidence of a link between trade exposure and voting for anti-globalization parties of the radical right, for instance Caselli *et al.* (2020), Caselli *et al.* (2021), Dippel *et al.* (2022), and Malgouyres (2014). Steiner and Harms (2023) also detect an effect of trade exposure on nationalist attitudes. Studies have also looked at the political implications of trade in the US, showing evidence of anti-incumbent effects (Margalit, 2011; Jensen *et al.*, 2017) and a role of trade shocks in the Trump victory (Autor *et al.*, 2020).

Overall, political discontent driven by globalization takes, in most cases, a very right

wing form. This is manifested not only in the authoritarian and nativist stances of radical right parties, but also in their stances regarding domestic economic policy. Increased trade exposure does not lead to greater support for left-wing political parties demanding more generous redistribution. For instance, in connection with Figure 4, [Colantone and Stanig \(2018c\)](#) find that trade exposure raises the success of economic nationalist parties in the upper-right quadrant of the figure, where most radical right parties are located, but does not have a significant effect on support for the isolationist left camp, in the upper-left quadrant, and if anything it reduces support for pro-trade left parties, in the bottom-left quadrant.

This presents a puzzle for the study of globalization and its backlash. As discussed in the previous section, globalization creates a social footprint, impacting specific social groups and regions disproportionately and therefore increasing inequalities both across individuals and across regions. The backlash results from inadequate compensation, in substance the failure to redistribute the gains of globalization and to address the unequal distribution of gains and pains from trade. In this context, one might expect that trade exposure would boost support for left-leaning parties, especially those advocating for income redistribution. Yet, rather than calls for a renewed social contract along the lines of the embedded liberalism compromise of the second half of the 20th century, what we witness is a syndrome involving a demand for protectionism, but an often explicit distrust towards welfare state policies. In addition, it has been documented that in public opinion stances regarding globalization (in its various facets) are basically uncorrelated with preferences for redistribution ([Mader et al., 2020](#)).

Several factors may help explain this unexpected finding. Firstly, enhancing the welfare state typically requires higher taxes, which could discourage support from the middle class. The middle class plays a substantial role in the electorate of Western democracies, and lower taxes have been identified as a central element of the appeal of radical right parties, enabling them to attract both middle-class and working-class voters ([Kitschelt and McGann, 1997](#)). The latter group may be more drawn to the protectionist aspect of these parties'

platforms, while a nationalist narrative provides a unifying rhetoric that bridges the gap between these diverse constituencies. As formalized by [Gennaioli and Tabellini \(2023\)](#), the decreased importance of class identification paired with the increased importance of an identitarian and nationalist cleavage leads working-class voters to attribute less importance to redistribution, and ultimately support non-redistributive platforms. This logic resonates with the suggestion by [Kitschelt \(2012\)](#) that blue-collar constituencies support the radical right *despite*, rather than *due to*, its lack of commitment towards the traditional core components of the welfare state. Relatedly, as we expand below, exposure to trade globalization may have had an effect on cultural attitudes, tilting them in an authoritarian and nativist direction. This naturally brings affected voters closer to economic nationalist and radical right parties. Moreover, globalization may have contributed to weaken the role of trade unions, which have historically acted as a link between the working class and pro-redistribution parties of the left.

In general, promises of redistribution may not be perceived as very credible in the context of the crisis of embedded liberalism discussed above: voters might simply display general distrust for elites and their policy proposals, including promises of redistribution as a solution to economic distress. This said, it has been documented that individuals might perceive themselves as losers of globalization, and this self-perception, or social identity, is in turn related to objective economic conditions ([Steiner et al., 2024](#)). This implies that the appeal of economic nationalism is possibly a consequence of a purposeful calculation of voters, based on proximity to radical right and other nationalist parties in terms of trade policy and economic nationalism.

At a minimum, the radical right does not propose a doubling-down of redistribution in response to import competition shocks. In our view, this is an issue that it is hard to study empirically in a general way, as in many cross-national survey collections the redistribution items are rather generic. Revealed preferences, in the form of party choice, are not informative, as they reflect a choice, already made by the voter, to trade off

support for redistribution for nationalism (broadly meant). Our own exploratory analysis of International Social Survey Program (ISSP) data indicates, though, that the self-reported taxation preferences of service and production workers (defined following the [Oesch, 2006](#) scheme) among radical right voters are much less anti-redistributive than those of the rest of the voters of such parties, albeit not as progressive as those of members of the same classes who support (radical or mainstream) left parties.

In closing, globalization of trade, through the distributional consequences of trade exposure, emerges as an important determinant of the globalization backlash. In the next section we discuss other factors behind the backlash and the concept of comorbidity.

5 Comorbidity

The globalization backlash is caused by a broader set of factors than just trade exposure. In what follows, we review the role of technological change, crisis-driven fiscal austerity, and immigration. We then discuss more broadly the role of cultural concerns, and the interaction between economic and cultural factors. We close by noticing how such a complex and rich combination of factors may be described through the medical concept of comorbidity, according to which a number of factors compound and interact with each other to generate the phenomenon under study.

Several studies have investigated the political consequences of technological change, focusing specifically on the role of robot adoption in manufacturing. Similar to trade globalization, this is a process that generates aggregate welfare gains, along with distributional consequences and the creation of winners and losers across different regions and social segments. At the individual level, being a winner or a loser depends on whether one's set of skills is more substitutable by robots, or complementary to robots. Intuitively, here lies the difference between, e.g., low-skill blue collar workers that lose their job because of robots, and high-skill engineers who enjoy new job opportunities thanks to automation. [Anelli](#)

et al. (2021) show that individuals that are more vulnerable to robot adoption, in virtue of their individual characteristics and region of residence, are more likely to face situations of economic distress and to support radical right parties. Similar findings have been obtained by [Gingrich \(2019\)](#) and [Im *et al.* \(2019\)](#) at the individual level, and by [Caselli *et al.* \(2021\)](#), [Frey *et al.* \(2018\)](#), and [Milner \(2021\)](#) when considering regional exposure to automation.

Overall, automation emerges as another dimension of structural change in the economy, generating distributional consequences that are consequential for voting behavior. Specifically, this phenomenon pushes voters towards anti-globalization parties of the radical right (and, to a lesser extent, of the radical left), thus contributing to the globalization backlash. This evidence highlights the importance of adopting a broad perspective when thinking of the backlash. In particular, economic distress does not need to originate from globalization in order for voters to move towards anti-globalization parties. Different sources of economic distress may compound with each other, which is definitely the case for trade and automation battering manufacturing regions. It is difficult for researchers, let alone for common citizens, to ascertain exactly the causes of economic distress. Protectionist promises made by anti-globalization parties may then be attractive for distressed constituencies no matter what the source of their distress is, and credible evidence exists that trade protectionism is seen by the public as a solution to labor market distress of different origins ([Di Tella and Rodrik, 2020](#); [Wu, 2022](#)). On top of that, one may end up supporting an anti-globalization party for reasons that have nothing to do with this party's stance on globalization. A common understanding in political science is indeed that choosing a party entails choosing a platform covering a broad range of policy positions (e.g., from trade policy to taxation), each of which can determine vote choice. These observations are important as we move to consider the role of fiscal austerity and immigration as drivers of the backlash.

An outstanding question is what has fueled the growing backing for leftist protectionist and isolationist parties. As previously discussed, these parties have gained significant traction in Europe, particularly following the onset of the financial and sovereign debt crisis.

Numerous scholarly contributions have pinpointed fiscal austerity as a primary catalyst for this political transformation. Voters have shifted their allegiance towards challenger left-leaning parties that opposed the mainstream consensus around austerity measures imposed by EU institutions, especially in the crisis-ridden southern European nations (Hernández and Kriesi, 2016; Hobolt and Tilley, 2018; Hobolt and De Vries, 2016; Foster and Frieden, 2019).

Colantone *et al.* (2022) also document a link between fiscal austerity and support for protectionist left parties—often called “left-populist” in the literature. They examine cross-regional variation in exposure to austerity, which is measured by the pre-crisis proportion of regional employment in the public sector. The rationale behind this empirical analysis is that austerity measures would have more pronounced negative effects in regions that, as of the year 2000, relied more heavily on public employment. In fact, these regions would be hit harder by salary and hiring freezes and a general downsizing of the public sector due to austerity. The analysis on the regions of fifteen countries in western Europe finds a positive and significant association between the share of historical public sector employment and support for the left isolationist camp after 2008. Importantly, in the context of this analysis, the effects of the China import shock discussed above can still be recovered from the data. This implies that the reaction to austerity is a complementary driver, not an alternative explanation, for the globalization backlash. While the import shock has pushed voters towards protectionist right parties, exposure to austerity can account for the left-wing manifestation of the backlash. Not by chance, the left-wing backlash took place especially in southern European crisis-hit countries, as witnessed by the success of parties unequivocally placed in the left side of the spectrum, like Podemos in Spain and Syriza in Greece, but also the pro-redistribution—albeit rhetorically ambiguous—Five Star Movement in Italy. It is crucial to note, however, that in other studies austerity has also been found to foster support for right-wing nationalist parties. Noteworthy contributions in this direction include Algan *et al.* (2017), Frieden and Walter (2017), Dal Bó *et al.* (2018), Fetzer (2019), Foster and

Frieden (2019), Guiso *et al.* (2019), and Broz *et al.* (2021).

Several studies have found that exposure to immigration in the area of residence pushes voters towards right-wing, anti-immigration parties, which tend to be also protectionist. Notable examples are Barone *et al.* (2016), Devillanova (2021), Dustmann *et al.* (2019), Hangartner *et al.* (2019a), Harmon (2018), and Tabellini (2020). These provide credible causal evidence building on a large literature of a more descriptive nature, linking opposition to immigration and radical right vote (e.g., Rydgren (2008); Lucassen and Lubbers (2012); Bonikowski (2017); Oesch and Rennwald (2018)).

Besides having a direct effect on voting, immigration may also act as a catalyst for the political implications of economic distress. In line with a literature that highlights the interplay between economic conditions and immigration in shaping radical right support (e.g., Arzheimer, 2009; Golder, 2003), Colantone and Stanig (2018b) provide evidence regarding immigration as a catalyst for the political effects of trade globalization. As reviewed in the previous section, the main result of this study is that exposure to Chinese competition at the regional level, measured between 1990 and 2007, raises support for the Leave option in the Brexit referendum of 2016. Another finding of the study is that support for Leave is not correlated with the share of immigrants in the population of each region, nor with recent arrivals of immigrants just before the referendum.

This finding on immigration may seem puzzling. In fact, the Brexit campaign prominently featured immigration issues, and many Leave voters cited dissatisfaction with immigration as a primary reason for their vote choice. Colantone and Stanig (2018b) reconcile this seemingly contradictory evidence by highlighting that what matters is people's perception of immigration as a problem, rather than the actual incidence of immigration in an area. In turn, economic distress driven by globalization emerges as a key determinant of negative immigration attitudes. As a matter of fact, trade exposure seems to be even more important than the regional extent of immigration, which is not systematically related to immigration attitudes. Colantone and Stanig (2018b) discuss three mechanisms potentially

linking globalization-driven distress to more negative views of immigration. The first is related to a scarcity of job opportunities in declining regions: natives may want to avoid perceived threat from immigrants as they look for a job. The second mechanism has to do with welfare chauvinism. The idea is that in trade affected regions citizens may rely more on welfare services and thus fear congestion due to immigrants. Finally, worsening immigration attitudes may have to do with scapegoating, as immigrants offer an easy target of blame in a situation of economic hardship whose origins are unclear. Economic nationalist and radical right parties may actually leverage strategically on this in order to increase their support. Overall, this evidence suggests that an economic shock such as trade exposure can have implications on individual cultural attitudes.

This discussion leads us to address the cultural manifestation of the globalization backlash. Many studies have documented an effect of exposure to globalization (and also automation) on cultural attitudes, for instance [Anelli *et al.* \(2021\)](#), [Ballard-Rosa *et al.* \(2021\)](#), [Ballard-Rosa *et al.* \(2022\)](#), [Carreras *et al.* \(2019\)](#), [Colantone and Stanig \(2018a\)](#), [Ferrara \(2022\)](#), and [Hays *et al.* \(2019\)](#). Overall, the evidence points to an effect in terms of more nativist, authoritarian, anti-cosmopolitan and anti-democratic attitudes. These changes in attitudes may be seen as an important channel through which economic shocks translate into shifts in voting behavior. In particular, as anticipated above, they provide an important explanation as to why the political response to globalization-induced economic distress has mainly taken an economic nationalist and radical right form. In fact, parties of the left hold much more permissive stances on immigration, along with a liberal leaning on civil rights and cosmopolitan values.

While culture may mediate the impact of economic factors on voting, it may also play its own independent role. A common reading of the globalization backlash is actually in terms of a “cultural backlash”, where a prominent role is played by the status threat posed by social transformations, international migration, changing race and gender relations, and demographic trends. In the cleavage theory tradition, [Bornschieer \(2010\)](#) stressed the

importance of traditionalism and communitarianism, and Hooghe *et al.* (2002) suggested the emergence of a dimension spanning a Green-Alternative-Libertarian and a Traditionalist-Authoritarian-Nationalist pole. The literature on the globalization backlash and the recent populist wave has provided evidence pointing to the importance of cultural attitudes as determinants of the backlash (e.g., Hangartner *et al.*, 2019b; Norris and Inglehart, 2019; Mutz, 2018). Some researchers see economic and cultural factors as fundamentally alternative and mutually exclusive (e.g., Mutz, 2018). We see them as complementary and mutually reinforcing. In particular, in light of the evidence just discussed, it is hard to conceive a shift in voting induced by economic shocks in the absence of any changes in attitudes and opinions. This view is shared by several others in the literature (e.g., Gidron and Hall, 2017; Franzese, 2019; Frieden, 2022).

In summary, the backlash against globalization is driven by a complex interplay of different economic and cultural factors. Borrowing from the medical literature, we can summarize the available evidence through the concept of comorbidity, by which several factors contribute and compound in order to generate the backlash. Understanding the relative importance of these drivers and their causal relationships requires sophisticated empirical methods and careful consideration of the endogeneity of individual attitudes and political outcomes. Further research is needed to disentangle the specific contributions of the different economic and cultural factors and their dynamic interactions in shaping the globalization backlash.

6 Conclusion

We have defined the globalization backlash as the political shift of voters and parties in a protectionist and isolationist direction, with substantive implications on governments' leaning and enacted policies. We have documented how the backlash unfolded from the mid-1990s onwards across 23 advanced democracies.

We have investigated the causes of the globalization backlash. First, we have discussed how, in theory, international trade liberalization may generate economic and social dynamics that lead to political backlash. Intuitively, these dynamics have to do with the distributional consequences of trade, i.e., the creation of winners and losers. We have then discussed the evidence on these distributional consequences, and on how they translate into voting behavior. The conclusion is that globalization itself can be considered as a cause of the globalization backlash.

Yet the backlash has also other drivers. In particular, we have discussed the role of technological change, especially in terms of robotization of manufacturing, and of exposure to crisis-driven fiscal austerity. Both phenomena determine situations of economic distress that have political repercussions. A role is also played by immigration, both directly and as a catalyst for the political implications of economic distress induced by other sources, for instance globalization. Finally, we have addressed the cultural manifestations of the backlash, especially in terms of authoritarianism and nativism.

In closing, the globalization backlash is a multifaceted and complex phenomenon driven by the interplay of a number of economic and cultural factors. Future research may try to shed light on the relative importance of these different factors, and on the causal structure of their dynamic interactions. What seems already clear is that the political sustainability of globalization requires a comprehensive approach to mitigating inequalities and improving social cohesion.

References

- ACHEN, C. and BARTELS, L. (2017). *Democracy for realists: Why elections do not produce responsive government*. Princeton University Press.
- ADDA, J. and FAWAZ, Y. (2020). The health toll of import competition. *The Economic Journal*, **130** (630), 1501–1540.
- ALGAN, Y., GURIEV, S., PAPAIOANNOU, E. and PASSARI, E. (2017). The european trust crisis and the rise of populism. *Brookings papers on economic activity*, **2017** (2), 309–400.
- ANELLI, M., COLANTONE, I. and STANIG, P. (2021). Individual vulnerability to industrial robot adoption increases support for the radical right. *Proceedings of the National Academy of Sciences*, **118** (47).
- ARZHEIMER, K. (2009). Contextual factors and the extreme right vote in western europe, 1980–2002. *American Journal of Political Science*, **53** (2), 259–275.
- AUTOR, D., DORN, D. and HANSON, G. (2019). When work disappears: Manufacturing decline and the falling marriage market value of young men. *American Economic Review: Insights*, **1** (2), 161–178.
- , —, — and MAJLESI, K. (2020). Importing political polarization? the electoral consequences of rising trade exposure. *American Economic Review*, **110** (10), 3139–3183.
- , — and HANSON, G. H. (2021). *On the persistence of the China shock*. Tech. rep., National Bureau of Economic Research.
- AUTOR, D. H., DORN, D. and HANSON, G. H. (2013). The china syndrome: Local labor market effects of import competition in the united states. *American Economic Review*, **103** (6), 2121–68.

- , — and — (2016). The china shock: Learning from labor-market adjustment to large changes in trade. *Annual review of economics*, **8**, 205–240.
- , —, — and SONG, J. (2014). Trade adjustment: Worker-level evidence. *The Quarterly Journal of Economics*, **129** (4), 1799–1860.
- BALLARD-ROSA, C., JENSEN, A. and SCHEVE, K. (2022). Economic decline, social identity, and authoritarian values in the United States. *International Studies Quarterly*, **66** (1).
- , MALIK, M. A., RICKARD, S. J. and SCHEVE, K. (2021). The economic origins of authoritarian values: Evidence from local trade shocks in the United Kingdom. *Comparative Political Studies*, **54** (13), 2321–53.
- BARONE, G., D’IGNAZIO, A., DE BLASIO, G. and NATICCHIONI, P. (2016). Mr. rossi, mr. hu and politics. the role of immigration in shaping natives’ voting behavior. *Journal of Public Economics*, **136**, 1–13.
- BERMAN, S. (2019). Populism is a symptom rather than a cause: democratic disconnect, the decline of the center-left, and the rise of populism in western europe. *Polity*, **51** (4), 654–667.
- BETZ, H.-G. (1993). The new politics of resentment: radical right-wing populist parties in western europe. *Comparative politics*, pp. 413–427.
- BONIKOWSKI, B. (2017). Ethno-nationalist populism and the mobilization of collective resentment. *The British journal of sociology*, **68**, S181–S213.
- BORNSCHIER, S. (2010). *Cleavage politics and the populist right. The new cultural conflict in Western Europe*. Temple University Press.
- (2018). Globalization, cleavages, and the radical right. *The Oxford handbook of the radical right*, pp. 212–238.

- BÖRZEL, T. A. and ZÜRN, M. (2021). Contestations of the liberal international order: From liberal multilateralism to postnational liberalism. *International Organization*, **75** (2), 282–305.
- BROZ, J. L., FRIEDEN, J. and WEYMOUTH, S. (2021). Populism in place: the economic geography of the globalization backlash. *International Organization*, **75** (2), 464–494.
- BURGOON, B. (2009). Globalization and backlash: Polanyi’s revenge? *Review of International Political Economy*, **16** (2), 145–177.
- CAMERON, D. R. (1978). The expansion of the public economy: A comparative analysis. *American political science review*, **72** (4), 1243–1261.
- CARRERAS, M., CARRERAS, Y. I. and BOWLER, S. (2019). Long-term economic distress, cultural backlash, and support for brexit. *Comparative Political Studies*, **52** (9), 1396–1424.
- CASELLI, M., FRACASSO, A. and TRAVERSO, S. (2020). Globalization and electoral outcomes: Evidence from italy. *Economics & Politics*, **32** (1), 68–103.
- , — and — (2021). Globalization, robotization, and electoral outcomes: Evidence from spatial regressions for italy. *Journal of Regional Science*, **61** (1), 86–111.
- COLANTONE, I., CRINO, R. and OGLIARI, L. (2019). Globalization and mental distress. *Journal of International Economics*, **119**, 181–207.
- , OTTAVIANO, G. and STANIG, P. (2022). The backlash against globalization. *Gopinath, G., E. Helpman, and K. Rogoff, Handbook of International Economics*, **5**.
- , — and TAKEDA, K. (2023). *Trade and Intergenerational Income Mobility: Theory and Evidence from the US*. Tech. rep., Bocconi University mimeo.
- and STANIG, P. (2018a). The economic determinants of the ‘cultural backlash’: Globalization and attitudes in western europe. *BAFFI CAREFIN Centre Research Paper*, (2018-91).

- and — (2018b). Global competition and brexit. *American Political Science Review*, **112** (2), 201–218.
- and — (2018c). The trade origins of economic nationalism: Import competition and voting behavior in western europe. *American Journal of Political Science*, **62** (4), 936–953.
- and — (2019). The surge of economic nationalism in western europe. *Journal of economic perspectives*, **33** (4), 128–151.
- DAL BÓ, E., FINAN, F., FOLKE, O., PERSSON, T. and RICKNE, J. (2018). Economic losers and political winners: Sweden’s radical right. *Unpublished manuscript, Department of Political Science, UC Berkeley*, **2** (5), 2.
- DE VRIES, C. E. and HOBOLT, S. (2020). *Political entrepreneurs: The rise of challenger parties in Europe*. Princeton University Press.
- DEVILLANOVA, C. (2021). Tolerant or segregated? immigration and electoral outcomes in urban areas. *Papers in Regional Science*, **100** (2), 495–515.
- DI TELLA, R. and RODRIK, D. (2020). Labour market shocks and the demand for trade protection: Evidence from online surveys. *The Economic Journal*, **130** (628), 1008–1030.
- DIPPEL, C., GOLD, R., HEBLICH, S. and PINTO, R. (2022). The effect of trade on workers and voters. *The Economic Journal*, **132** (641), 199–217.
- DIX-CARNEIRO, R., SOARES, R. R. and ULYSSEA, G. (2018). Economic shocks and crime: Evidence from the brazilian trade liberalization. *American Economic Journal: Applied Economics*, **10** (4), 158–195.
- DIXIT, A. and NORMAN, V. (1986). Gains from trade without lump-sum compensation. *Journal of International Economics*, **21** (1-2), 111–122.

- DÖRING, H. and MANOW, P. (2020). Parliaments and governments database (parlgov): Information on parties, elections and cabinets in modern democracies. *Development Version*.
- DUSTMANN, C., VASILJEVA, K. and PIIL DAMM, A. (2019). Refugee migration and electoral outcomes. *The Review of Economic Studies*, **86** (5), 2035–2091.
- EGGER, P. H., NIGAI, S. and STRECKER, N. M. (2019). The taxing deed of globalization. *American Economic Review*, **109** (2), 353–390.
- FELER, L. and SENSES, M. Z. (2017). Trade shocks and the provision of local public goods. *American Economic Journal: Economic Policy*, **9** (4), 101–143.
- FERRARA, F. M. (2022). Why does import competition favor republicans? Localized trade shocks and cultural backlash in the US. *Review of International Political Economy*, **115**, 1–24.
- FETZER, T. (2019). Did austerity cause brexit? *American Economic Review*, **109** (11), 3849–3886.
- FOSTER, C. and FRIEDEN, J. (2019). Compensation, austerity, and populism: social spending and voting in 17 western european countries. *Center for European Studies, Harvard University*.
- FRANZESE, R. J. J. (2019). The comparative and international political economy of anti-globalization populism. *Oxford Research Encyclopedia of Politics*.
- FREY, C. B., BERGER, T. and CHEN, C. (2018). Political machinery: did robots swing the 2016 us presidential election? *Oxford Review of Economic Policy*, **34** (3), 418–442.
- FRIEDEN, J. (2018). The politics of the globalization backlash: Sources and implications. *Unpublished manuscript, Department of Government, Harvard University*.

- (2022). Attitudes, interests, and the politics of trade: A review article. *Political Science Quarterly*, **137** (3), 569–588.
- and WALTER, S. (2017). Understanding the political economy of the eurozone crisis. *Annual review of political science*, **20**, 371–390.
- GENNAIOLI, N. and TABELLINI, G. (2023). Identity politics.
- GIDRON, N. and HALL, P. A. (2017). The politics of social status: economic and cultural roots of the populist right. *The British Journal of Sociology*, **68** (S1), S57–S84.
- GINGRICH, J. (2019). Did state responses to automation matter for voters? *Research & Politics*, **6** (1), 2053168019832745.
- GOLDER, M. (2003). Explaining variation in the success of extreme right parties in western europe. *Comparative political studies*, **36** (4), 432–466.
- (2016). Far right parties in europe. *Annual review of political science*, **19**, 477–497.
- GUISSO, L., HERRERA, H., MORELLI, M. and SONNO, T. (2019). Global crises and populism: the role of eurozone institutions. *Economic Policy*, **34** (97), 95–139.
- HANGARTNER, D., DINAS, E., MARBACH, M., MATAKOS, K. and XEFTERIS, D. (2019a). Does exposure to the refugee crisis make natives more hostile? *American political science review*, **113** (2), 442–455.
- , —, —, — and — (2019b). Does exposure to the refugee crisis make natives more hostile? *American Political Science Review*, **113** (2), 442–455.
- HARMON, N. A. (2018). Immigration, ethnic diversity, and political outcomes: Evidence from denmark. *The Scandinavian Journal of Economics*, **120** (4), 1043–1074.
- HAYS, J. (2017). Embedded liberalism and the populist backlash. *University of Pittsburgh*.

- , LIM, J. and SPOON, J.-J. (2019). The path from trade to right-wing populism in Europe. *Electoral Studies*, **60**, 1020–38.
- HAYS, J. C. (2009). *Globalization and the new politics of embedded liberalism*. Oxford University Press.
- , EHRLICH, S. D. and PEINHARDT, C. (2005). Government spending and public support for trade in the oecd: An empirical test of the embedded liberalism thesis. *International organization*, **59** (2), 473–494.
- HELPMAN, E. (2018). *Globalization and inequality*. Harvard University Press.
- HERNÁNDEZ, E. and KRIESI, H. (2016). The electoral consequences of the financial and economic crisis in europe. *European Journal of Political Research*, **55** (2), 203–224.
- HOBOLT, S. B. and DE VRIES, C. (2016). Turning against the union? the impact of the crisis on the eurosceptic vote in the 2014 european parliament elections. *Electoral studies*, **44**, 504–514.
- and TILLEY, J. (2018). Fleeing the centre: the rise of challenger parties in the aftermath of the euro crisis. In *Europe's Union in Crisis*, Routledge, pp. 57–77.
- HOOGHE, L. and MARKS, G. (2018). Cleavage theory meets europe's crises: Lipset, rokkan, and the transnational cleavage. *Journal of European public policy*, **25** (1), 109–135.
- , — and WILSON, C. J. (2002). Does left/right structure party positions on european integration? *Comparative political studies*, **35** (8), 965–989.
- IM, Z. J., MAYER, N., PALIER, B. and ROVNY, J. (2019). The “losers of automation”: A reservoir of votes for the radical right? *Research & Politics*, **6** (1), 2053168018822395.
- JENSEN, J. B., QUINN, D. P. and WEYMOUTH, S. (2017). Winners and losers in international trade: The effects on us presidential voting. *International Organization*, **71** (3), 423–457.

- KITSCHOLT, H. (2012). Social class and the radical right: Conceptualizing political preference formation and partisan choice. In *Class politics and the radical right*, Routledge, pp. 224–251.
- and MCGANN, A. J. (1997). *The radical right in Western Europe: A comparative analysis*. University of Michigan Press.
- KRIESI, H. (1998). The transformation of cleavage politics the 1997 stein rokke lecture. *European journal of political research*, **33** (2), 165–185.
- , GRANDE, E., DOLEZAL, M., HELBLING, M., HÖGLINGER, D., HUTTER, S. and WÜEST, B. (2012). *Political conflict in western Europe*. Cambridge University Press.
- , —, LACHAT, R., DOLEZAL, M., BORNSCHIER, S. and FREY, T. (2006). Globalization and the transformation of the national political space: Six european countries compared. *European Journal of Political Research*, **45** (6), 921–956.
- LANGSÆTHER, P. E. and STUBAGER, R. (2019). Old wine in new bottles? reassessing the effects of globalisation on political preferences in western europe. *European Journal of Political Research*, **58** (4), 1213–1233.
- LOWE, W., BENOIT, K., MIKHAYLOV, S. and LAVER, M. (2011). Scaling policy preferences from coded political texts. *Legislative Studies Quarterly*, **36** (1), 123–155.
- LUCASSEN, G. and LUBBERS, M. (2012). Who fears what? explaining far-right-wing preference in europe by distinguishing perceived cultural and economic ethnic threats. *Comparative political studies*, **45** (5), 547–574.
- MADER, M., STEINER, N. D. and SCHOEN, H. (2020). The globalisation divide in the public mind: belief systems on globalisation and their electoral consequences. *Journal of European Public Policy*, **27** (10), 1526–1545.

- MALGOUYRES, C. (2014). The impact of exposure to low-wage country competition on votes for the far-right: evidence from french presidential elections. *Unpublished manuscript, Department of Economics, European University Institute*. [https://goo. gl/wLbZRJ](https://goo.gl/wLbZRJ).
- MANSFIELD, E. D., MILNER, H. V. and RUDRA, N. (2021). The globalization backlash: Exploring new perspectives. *Comparative political studies*, **54** (13), 2267–2285.
- MARGALIT, Y. (2011). Costly jobs: Trade-related layoffs, government compensation, and voting in us elections. *American Political Science Review*, **105** (1), 166–188.
- (2019). Economic insecurity and the causes of populism, reconsidered. *Journal of Economic Perspectives*, **33** (4), 152–70.
- MILNER, H. V. (2021). Voting for populism in europe: Globalization, technological change, and the extreme right. *Comparative Political Studies*, **54** (13), 2286–2320.
- MUDDE, C. (2004). The populist zeitgeist. *Government and opposition*, **39** (4), 541–563.
- (2021). Populism in europe: an illiberal democratic response to undemocratic liberalism (the government and opposition/leonard schapiro lecture 2019). *Government and Opposition*, **56** (4), 577–597.
- MUTZ, D. C. (2018). Status threat, not economic hardship, explains the 2016 presidential vote. *Proceedings of the National Academy of Sciences*, **115** (19), E4330–E4339.
- NORRIS, P. (1997). Representation and the democratic deficit. *European Journal of Political Research*, **32** (2), 273–282.
- and INGLEHART, R. (2019). *Cultural Backlash: Trump, Brexit, and Authoritarian Populism*. Cambridge University Press.
- OESCH, D. (2006). Coming to grips with a changing class structure: An analysis of employment stratification in britain, germany, sweden and switzerland. *International Sociology*, **21** (2), 263–288.

- and RENNWALD, L. (2018). Electoral competition in europe’s new tripolar political space: Class voting for the left, centre-right and radical right. *European journal of political research*, **57** (4), 783–807.
- OLLROGE, R. (2023). Deepening the divide: Does globalization increase the polarization between winners and losers of globalization? *The British Journal of Sociology*, **74** (5), 873–914.
- PAVCNIK, N. (2017). *The impact of trade on inequality in developing countries*. Tech. rep., National Bureau of Economic Research.
- PIERCE, J. R. and SCHOTT, P. K. (2020). Trade liberalization and mortality: evidence from us counties. *American Economic Review: Insights*, **2** (1), 47–63.
- POLK, J. and ROSÉN, G. (2024). Trade and the transnational cleavage in european party politics. *Journal of European Public Policy*, **31** (1), 104–130.
- REDDING, S. J. (2022). Trade and geography. *Handbook of International Economics*, **5**, 147–217.
- RICKARD, S. J. (2023). The electoral consequences of compensation for globalization. *European union politics*, **24** (3), 427–446.
- RODRIK, D. (1998). Why do more open economies have bigger governments? *Journal of political economy*, **106** (5), 997–1032.
- (2021). Why does globalization fuel populism? economics, culture, and the rise of right-wing populism. *Annual Review of Economics*, **13**, 133–170.
- RUGGIE, J. G. (1982). International regimes, transactions, and change: embedded liberalism in the postwar economic order. *International organization*, **36** (2), 379–415.
- RYDGREN, J. (2008). Immigration sceptics, xenophobes or racists? radical right-wing voting in six west european countries. *European Journal of Political Research*, **47** (6), 737–765.

- STEINER, N. D. and HARMS, P. (2023). Trade shocks and the nationalist backlash in political attitudes: panel data evidence from great britain. *Journal of European Public Policy*, **30** (2), 271–290.
- , MADER, M. and SCHOEN, H. (2024). Subjective losers of globalization. *European Journal of Political Research*, **63** (1), 326–347.
- SWANK, D. and BETZ, H.-G. (2003). Globalization, the welfare state and right-wing populism in western europe. *Socio-Economic Review*, **1** (2), 215–245.
- TABELLINI, M. (2020). Gifts of the immigrants, woes of the natives: Lessons from the age of mass migration. *The Review of Economic Studies*, **87** (1), 454–486.
- TØRSLØV, T., WIER, L. and ZUCMAN, G. (2023). The missing profits of nations. *The Review of Economic Studies*, **90** (3), 1499–1534.
- VOLKENS, A., LEHMANN, P., MATTHIESS, T., MERZ, N., REGEL, S. and WERNER, A. (2016). The manifesto data collection. manifesto project (mrg/cmp/marpor). version 2016a. *Wissenschaftszentrum Berlin für Sozialforschung (WZB)*.
- WALTER, S. (2021). The backlash against globalization. *Annual Review of Political Science*, **24**, 421–442.
- WU, N. (2022). Misattributed blame? attitudes toward globalization in the age of automation. *Political Science Research and Methods*, **10** (3), 470–487.
- ZASLOVE, A. (2008). Exclusion, community, and a populist political economy: The radical right as an anti-globalization movement. *Comparative European Politics*, **6** (2), 169–189.
- ZÜRN, M. (2022). How non-majoritarian institutions make silent majorities vocal: A political explanation of authoritarian populism. *Perspectives on Politics*, **20** (3), 788–807.