

**WORKING DRAFT – comments welcomed**

## **Polarized Democracies in Comparative Perspective: Toward a Conceptual Framework**

By

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### **Overview**<sup>1</sup>

Democracy is intended to be a system of governance to manage competing interests in a society in a peaceful way, following agreed-upon rules of contingent consent (Przeworski 1986).

Democratic politics also provide opportunities for newly-emerging or previously-excluded sectors of the population to strive for and reach political power. Today, however, many democracies, old and new, are straining to include these new groups without succumbing to a pernicious pattern of political and societal polarization.

Polarization is often thought of as a measurement of the ideological or social distance between different groups in a society (Hetherington 2001; 2009 Niemi, Weisberg and Kimball 2011; Fiorina and Abrams 2008 . In this sense, it is a neutral concept encompassing and measuring the natural differences within any democracy (Stavrakakis and Katsmabekis 2014, 2015 Slater; 2016). Our concern is when these differences become aligned within (normally two) camps with

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<sup>1</sup> This paper draws on memos written for a workshop on Polarized Polities at Georgia State University in Atlanta, March 14-15, 2016, funded by an ISA Venture Grant. These papers are cited as Workshop Memo.

mutually exclusive identities and interests (Lozada 2014; Somer, 2001). These are highly polarized polities with pernicious outcomes. Multiple cross-cutting cleavages (based on identities or interests) collapse into one single cleavage with impermeable boundaries (Lebas, 2006 Lijphart 1968 ). At the extreme, each camp comes to perceive the “Other” in such negative terms that a normal political adversary with whom to engage in a competition for power is transformed into an enemy posing an existential threat to be vanquished (Pew Research, 2016; Garcia, 2016; Schmitt 1996). Categorization extends to all aspects of life, not just political, and peaceful coexistence is no longer perceived by citizens as possible (Lozada, 2014; McCoy and Diez 2011).

Polarization can be studied as both a cause and a consequence. Situations of deep polarization *create* problems of governance as communication breaks down and the two camps prove unwilling and unable to negotiate and compromise. Political gridlock paralyzes government, and in some cases results in instability if neither side can prevail in the long run. Alternatively, one camp may become hegemonic and tend toward authoritarianism. At the societal level, citizens become divided spatially and socially. They come to believe they can no longer coexist in the same nation.

Polarization may also *result* from political inclusion when a particular pattern occurs in democratic politics: a previously excluded or marginalized sector of the population successfully gains political power through the ballot box, governs unilaterally to achieve the deep reforms they espouse, and produces a backlash from the previous power elites. The resulting conflict may end in a) gridlock and/or instability, with alternating governments failing to achieve governability; b) removal of the new group from power; or c) increasing authoritarian behavior by the incumbent to stay in power.



Even with very different underlying cleavages (class, ideology, religion, ethnicity, urban-rural, national-cosmopolitan, traditional-modern), the processes and outcomes remain similar. Examples range from transitional Egypt with Morsi’s Muslim Brotherhood government and ouster by coup; to youngish and Third Wave democracies with Chávez in Venezuela, Erdogan in Turkey, Thaksin in Thailand, and Mugabe in Zimbabwe; to polarized politics in Europe (especially Hungary and Greece and now Brexit), and the Tea Party capture of the Republican party and political gridlock, followed by the Trump outsider candidacy championing a resentful white working class in the United States.

In the larger project, we examine this pattern to determine the conditions under which the arrival to power through electoral politics of previously excluded sectors sometimes result in new forms of exclusion, backlash and conflict, while in other cases the conflict management mechanisms of democratic politics appear to allow for peaceful inclusion. We seek to determine causes, consequences, as well as solutions to pernicious polarization.

In this paper, we construct conceptual framework and a nascent typology to study polarization. We begin by reviewing the literature on polarization and propose a definition and typology of polarization distinguishing political from societal polarization. We then discuss drivers of polarization at the level of agency, institutions, and structure. We explore whether polarization is elite or mass driven, the individual social-psychology of polarization, and the role of institutional incentives and structural cleavages.

## **Conceptualizing polarization**

Differences (of identities, interests and attitudes) are an inherent part of democracy, to be managed, not eliminated. Identity cannot be formulated without difference, notes Stavrakakis (2016). “Simply put, already from Greek antiquity, antagonism and polarization have been seen as the unavoidable predicament of a democratic polity; indeed as a challenge to be actively assumed and not as a symptom of a political pathology to be eliminated” (Stavrakakis, 2016).

This view of democracy’s inherent nature to produce and accommodate conflicting interests has been echoed by other scholars. Larry Diamond (1990:49) has beautifully summarized this conundrum in the following words: ‘Democracy is, by its nature, a system of institutionalized competition for power.... But any society that sanctions political conflict runs the risk of its becoming too intense, producing a society so conflict-ridden that civil peace and political stability are jeopardized. Hence the paradox: Democracy requires conflict--but not too much; competition there must be, but only within carefully defined and universally accepted boundaries. Cleavage must be tempered by consensus.’”

Polarization occurs when a normal multiplicity of interests and identities in a society begins to group along a single dimension, splitting into two opposing camps. This process of polarization is represented by different authors with different terms, but describing the same dynamic: Previously cross-cutting cleavages become overlapping cleavages (Lijphart 1968). “A new representation emerges splitting the social field by paratactically grouping differences, temporarily reducing their multiplicity in a single polarity” (Stavrakakis 2016, referring also to the work of Laclau and Mouffe (2001: xiii). Unlike other kinds of identity-based mobilization, polarization “simplifies rather than complicates cleavage structures” and “flattens cross-cutting cleavages along a single cleavage” (Lebas, 2016).

The alignment of interests under a single identity is thus a hallmark of polarization. It is not so much the hardening of opinion on a single issue, but rather the reorganization of opinions on different issues along specific identity markers that makes polarization such a difficult problem to solve. In such situations, a person’s group identity can tell us how she would respond to any particular policy debate. As Baladassari and Gelman observe in the context of polarization of American public opinion:

Political polarization constitutes a threat to the extent that it induces alignment along multiple lines of potential conflict and organizes individuals and groups around exclusive identities, thus crystallizing interests into opposite factions. In this perspective, opinion alignment, rather than opinion radicalization, is the aspect of polarization that is more likely to have consequences on social integration and political stability. From a substantive viewpoint, if people aligned along multiple, potentially divisive issues, even if they did not take extreme positions on each of them, the end result would be a polarized society. Analytically, it can be shown that people's ideological distance and, thus, polarization depend not only on the level of radicalization of their opinions but also on the extent to which such opinions are correlated with each other..... (2008:2).

In other words, polarization is not about choosing one identity over the others. Rather it is about elevating one particular cleavage to a point where multiple identities and interests align under it, rather than provide cross-cutting cleavages and multiple points of contact.

### **Toward a Typology: Political and Societal Polarization**

#### ***Political polarization***

The classic work of Giovanni Sartori (1976) identified polarized party systems based on ideological space among parties and their electorates, with some situations producing centrifugal extremes and erasing the center that Anthony Downs' (1957) centripetal dynamics would predict. In its narrowest sense, political polarization takes place in the electoral context. The most common measurement is ideological distance between parties, leaders, or voters on a left-right scale.

We contend, however, that not all political polarization is amenable to ideological measurement on a left-right scale. In countries without programmatic parties, party identification does not necessarily reflect ideological difference. As Slater (2016) notes, "Across most of the developing or postcolonial world, electoral competition is not clearly structured along the classic Downsian left-right ideological continuum at all. Especially but not exclusively in sub-Saharan

Africa and Asia, competitive elections and democratic participation are widely perceived and portrayed as exercises in patronage distribution rather than programmatic differentiation. From Indonesia to India to Iraq, from Pakistan to the Philippines to Peru, and from Bolivia to Burkina Faso to Bangladesh, political parties compete for power in ways that consistently channel competing demands for access to the state and its resources, but only rarely channel sharply distinctive ideological visions.

When polarization occurs, leaders may include various symbolic meanings within the label of “left” or “right” without fitting a classic economic ideological distinction. In the Hungarian context, for example, Vegetti observes this trend when he remarks: ‘Parties on the right strongly support religious principles in politics, emphasize nationalist symbols, advocate greater government authority on individual lifestyles, and in general value order and stability. Parties on the left are cosmopolitan, support a secular state, and advocate greater individual freedoms and civil liberties’ (2016: 7).

We contend that alternative cleavages to the left-right ideological one may come to the forefront as the dominant dimension of polarization. The classic is the people vs. elites polarization of populism. Populist discourse serves to link a series of unsatisfied demands and form a collective identity around “the people”, in opposition to an elite accused of frustrating their interests. Both Stavrakakis (2016) and Lebas(2016) emphasize the relational nature of polarization – two camps are formed along a single dimension. If that dimension is a collective identity of the “people” blaming a nefarious elite, then polarization occurs when an anti-populist camp emerges to challenge it.

But populism/anti-populism is not the only dimension along which identities can be formed. In our case studies, we have also identified religious/secular, national/cosmopolitan, traditional/modern, urban/rural, austerity/anti-austerity, economic ideology of market/socialism, and political ideological royalist/popular or participatory/liberal conceptions of democracy as the lines of cleavage.

## *Societal polarization*

Political polarization may extend into other aspects of social relations. When this happens, we refer to it as societal polarization.<sup>2</sup> Lozada (2014) provides a useful starting point in the conceptualization of societal polarization. Although she uses the term social instead of societal, her conceptualization neatly captures the tension in social relations that mirrors the political ones. Describing the Venezuelan context, she defines social polarization as processes of group categorization and polarization in the context of social conflict that extend to spaces of social coexistence, “such as families, schools, churches, and communities, and that take on the same exclusion, rigidity and confrontation present in the political struggle.” (Lozada 2014: 4.

In the European context, Oosterwall et al. explain the difference between these two types of polarization in the following manner: “Political polarization points at large differences in policy positions between opposed ‘camps’ or ‘coalitions’ of political parties, and high similarities in policy positions within these coalitions. Examples include a left-wing coalition of parties versus a right-wing coalition, or a coalition of tolerant parties versus a coalition of xenophobic parties. Societal polarization is the equivalent for the existence of a few, large groups in society with opposing preferences (or opposing policy preferences)” (2010:261).

In cases of extreme polarization, then, what happens in the context of electoral politics can affect the interpersonal relationships and group interactions of the citizens as well. In Hungary, for example, we see the ramification of partisan rivalry into different aspects of social life. As Lengyel and Ilonszki describe, in Hungary “there are magazines for dog-keepers, bird-watchers, fishing anglers and many other hobbies that voice right-wing or left-wing political views. It has been found that instead of discussing their monthly rents and other housing issues, tenants and owners of condominiums use political labels to denounce each other in meetings” ((2010:165, cited in Vegetti 2016).

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<sup>2</sup>It is useful to distinguish between societal and social polarizations at this point as the latter term often surfaces in the literature as a measure of income differences (Ray 1994, Wolfson 1994, Duclos, Esteban and Ray 2004, Quah 1997, Wang and Tsui 2000, Zhang and Kanbur 2001, Gradin and Ray 2007, Chakravarty and Majumder 2001) or simply interchanged with the first term. We take a broader view of societal polarization that includes socio-economic status differences, but is not limited to them.

Our other case studies represent an even more extreme form of societal polarization where territorial-psychological-physical aspects of people's daily lives are affected by polarization. For example, in the case of Venezuela, political polarization extended into the social sphere by locking people belonging to opposition groups into segregated territories, literally dividing the capital city of Caracas. The historical legacy of income inequality and class cleavage is reflected in difference in neighborhoods where Chavistas and anti-Chavistas reside. In this artificially 'essentialized' struggle, people are being polarized not only on the psychological plane over political matters, but also on a spatial-physical plane over social matters (Garcia-Gaudilla and Mallen, 2016:4).

The tendency to avoid all kinds of social communication and physically cut-off the 'other' from one's own life is exemplified in Turkey as people belonging to opposing camps (voters of opposing political parties) would not even think about marrying into each other's family (Sommer 2016:2). In other words, there is a propensity to view the 'other' group as essentially homogenous and treat the members of that group according to some stereotypical notion. This hinders social interaction and blocks all channels of communication between antagonistic groups, making de-polarization a difficult task. Borrowing from Sommer again, once the forces of polarization are set in motion, they take on a life of their own. Sharp polarization means lesser social interaction between groups, which means further polarization.

### ***Interaction of Political and Societal Polarization***

But how do politicians and citizens come to this point where compromise, negotiation and empathy become impossible? In answering the question, Garcia-Guadilla and Mallen (2016: 5)) describe polarization as a process, rather than a situation. From their point of view: "polarization requires societies replace pragmatic politics, calculated risks, rational behavior, tolerance and plurality with a Schmittian-styled existential struggle." It is this idea of existential struggle between "friends" and "enemies" to protect one's way of life from that is at the core of the politics of polarization.

Thus identity, interest, and opinion become linked in the politics of polarization. Although polarization manifests itself in the form of a struggle between mutually exclusive identity-based



groups, these identities are mere vehicles to drive certain conflicting interests forward. The expression of those conflicting interests needs group-based identity markers; some of these markers may be long-existing in a society, and some may be novel creations. In a highly polarized society and polity, people express their conflicting opinions as a part of the group they belong to and expect the same from the 'other' group. Persons who do not hold your opinion become perceived as an "enemy" who does not share any common trait with you (in terms of identity or interest or both). Therefore, you do not see any point in socially interacting with her and entering into a dialogue to solve common problems.

This exaggeration of in-group homogeneity and inter-group difference is evident in Hungarian politics where "...given the importance of the left-right divide for any type of policy consideration, let alone all the aspects of social life that have been penetrated by politics, the need to correctly discriminate between political stimuli belonging to different categories is high...Hence, Hungarian citizens are likely to overemphasize policy differences between left and right. This implies that Hungarian citizens are likely to overestimate the degree to which the two camps are internally homogenous and distant from one another in terms of policy preference" (Vegetti 2016:11).

Polarizing discourse impeding collective action becomes a vicious feedback loop. As Somer argues, the causal mechanism that links identities to perceived interests is collective actions (Somer, 2016 cites Hechter & Okamoto, 2001 for this point). "People whose dominant discursive-conceptual environment tells them that they are mutually exclusive 'others' do not seek joint collective actions. The less they undertake joint collective actions, the more their perceptions of difference, and the more likely it is that they will perceive their interests to be zero-sum. Alternatively, the flow of causality may flow from interest to identity. The more people perceive that they have positive-sum interests, the more they seek joint collective actions, thereby tending to develop compatible definitions of their identities" (Somer 2005, cited in Somer 2016 p. 3.)

In societal polarization, ordinary people may internalize the partisan divide in their day-to-day life, by putting arbitrary labels on people sharing different political attitudes, creating or

nurturing mutually exclusive group identities, refusing to communicate or interact with people from the opposing group, no longer sharing common physical space, not appreciating the heterogeneity of membership (in terms of beliefs, opinions, attitude and behavior) of the seemingly homogenous ‘other’ group and failing to recognize cross-cutting identities and interests to defuse the situation.

Social distance, measured as the level of social interactions between the group, is a manifestation of such polarization. This social distance is largely due to the total dehumanization of the ‘opponent’. As Lozada (2014) points out, natural in-group favoritism does not automatically result in the hatred and dehumanization of the out-group. When the other is put in a culturally invisible domain, however, it becomes easier to dehumanize others. Instead of referring to others as ‘you’, people begin referring to the out-group as ‘them’. This change in language reflects and reinforces the politics of alienation and exclusion at the social plane.

Just as in the political plane, people holding middle ground in the society also find the ground beneath them shrinking quickly. It does not matter whether one supports a particular camp or not, in a highly polarized society individuals are bound to choose a side or be labeled by others as belonging to one side or the other.

### ***Thresholds of Polarization***

As we have noted, differences are inherent in democracy. Our concern is when differences in policy preferences, identities and interests become aligned into two camps along a single dominant and impermeable dimension. Multiple underlying cleavages may be encompassed in these camps, but usually there is some overarching identifying label to signal the two camps and the dominant cleavage, as discussed above.

When the creation of the two camps reaches the level of a classic “in-group” and “out-group” identified in Manichean terms, we call this ***pernicious polarization***. In this instance, the two camps use moral terms of “good” and “evil” to refer to themselves and the “Other”. As Somer describes, polarization is the propagation of a “rival image” of two identities, “depicting these identities in a mutually exclusive and/or antagonistic relationship, in society” (2016: 3). These rival images have an identity component that is mutually exclusive rather than compatible, and

an interest component that is zero-sum rather than positive-sum. Similarly, Garcia-Gaudilla and Mallen describe a process in which normal adversaries become the “enemy” who pose an existential threat (Garcia-Gaudilla and Mallen, 2016).

In situations of pernicious polarization, political discourse is often reduced to language vilifying the opponent and reducing them to the ‘inferior’ Other by stripping them of any morally redeemable quality in the contest of electoral politics is just one aspect of political polarization.

In sum, a polarized society exhibits certain features which mere existence of difference of opinion or multitude of identities cannot cause or explain. Some of the most striking features of pernicious polarization that clearly distinguishes the situation from a healthy pluralism in democratic society are:

- a) Collapse of multiple cleavages into one dominant cleavage or boundary.
- b) Articulation of demands and interests around those identities.
- c) Two camps characterized in moral terms of “good” and “evil”.
  
- d) Treatment of these identities as mutually exclusive and antagonistic, thus negating the possibility of the existence of common interests between different groups.
- e) Greater intra-group cohesion and lesser inter-group bonding.
- f) Increasing level of stereotyping and prejudice due to lack of direct communication and/or social interaction with the opposing group(s).
- g) The center drops out and the polarized camps attempt to label individuals and groups in society as one or the other.
- h) This antagonistic relationship manifests itself in spatial and psychological separation of the polarized groups.

### **Causal Mechanisms of Polarization**

How do societies transform from normal adversarial politics and pluralistic identities to two camps with interests lined up along a single dimension, what we have called pernicious

polarization? Social scientists do not agree whether such polarization is elite-driven or mass-driven, a product of agency or structure. Our project intends to examine these issues in several comparative cases. Nevertheless, we can identify different types of drivers that characterize different types of polarization in our typology, and begin to theorize the linkages between them.

We attempt to identify different drivers, or causal mechanisms, of polarization. At the level of agency, one question is whether polarization is driven by elites or the masses, and what is the interaction between them. At the institutional level, political arrangements governing the relationship between governments and citizens and electoral rules often provide incentives and opportunities to augment or mitigate polarizing strategies and outcomes. At the structural level, historical legacies, demographics, socio-economic and cultural cleavages play important roles. Finally, we lay out the political dynamic model we have identified to explain a process of polarization in our subset of cases in which newly-empowered groups gain political power and create backlash that may result in pernicious polarization, with various outcomes damaging to democracy.

***Agency: Elite or Mass-Driven***

At first glance, one may assume that structural factors creating deep cleavages – class, ethnicity, religion – must underlie polarized societies. Nevertheless, our cases indicate that existing cleavages, even more shallow, may be simply exploited by ambitious leaders under certain conditions. One such condition is the exclusion of a group of people from the political and economic benefits of a society. For example, the legal discrimination against blacks in pre-civil rights United States or apartheid South Africa, or against indigenous peoples in Bolivia, spilled over into political, economic and social exclusion. Similarly, prohibitions on Islamist parties such as the Muslim Brotherhood in Egypt, or marginalization of the urban and rural poor in Venezuela, excluded these groups from sharing in economic and/or political resources.

Such deep grievances may give rise to a particular pattern of politics once those legal barriers are removed and such groups gain political power electorally, or in moments of democratic crisis when previously marginalized groups gain power and tend to govern in unilateral fashion to

achieve deep reforms. A resulting backlash from now newly-excluded elites often leads to a polarized polity. Mass frustrations thus “lead” this pattern of polarization, but it requires a (often charismatic) leader or strong organization to drive it.

### *Political Elites as Drivers*

Alternatively, politicians may polarize as an electoral strategy, seeking a wedge issue and thus magnifying an existing cleavage. The creation of these ‘rival images’ (Somer 2016: 2) is a **discourse-driven process** where divisive symbolic narratives create this illusion of irreconcilable difference between two groups with opposing interests and opinions. Further, “this process of polarization can be initiated and sustained by political entrepreneurs who expect political benefits from such a discourse, but may also become self-propagating and thus entrap political actors themselves” (Somer, 2016, 3). The process of polarization can thus feed on existing social cleavages like race/ethnicity/religion/class etc., but those cleavages are themselves not sufficient in activating polarization at political and societal levels.

In an effort to win popular support in electoral democracy, polarizing discourse highlighting an existing cleavage or creating a new one becomes a dominant electoral strategy. It serves as an artificial divide between groups of people based on some issues/identities that become salient through discursive exercise. In a highly polarized society, opposing camps brand each other in ‘totalizing terms’ (Handlin 2016). Mistrust is a common theme in such society (Kongkirati 2016), which is exacerbated by lack of social interaction and communication (LeBas 2006). In such a situation, people holding moderate opinions are forced to the extremes against their will, therefore eliminating any chance of dialogue between opposing groups. As evident in Venezuela, it becomes near to impossible to claim a neutral or middle position in a polarized polity as proponents of each camp (usually the most radical positions) attempt to label or categorize the entire population into one group or another, and label as traitorous any attempt to compromise with the other side.(McCoy and Diez, 2011, Garcia-Gaudilla and Mallen 2016; Lozada 2014.)

Much of the literature on U.S. politics also indicates that this polarization is top-down (Abramowitz and Saunders 2008; Mason 2015; Pomper and Weiner 2015; Smidt 2015). In this way, the extreme options in political elite groups force sorting in the electorate, who may be

ideologically moderate or even in contrast to their political label (Jacoby 2014). Over generations, these political labels then become for many a social identity much like religious affiliation or race (Greene 1994; Claassen, Tucker, and Smith 2015; Devine 2015). In the United States, where racial divides separated the population well into the 1960s and '70s, political identification has overtaken race as the distinguishing factor between individuals in establishing trust or sparking discrimination (Iyengar and Westwood 2015).

Zsolt (2005) explains how the agency of political actors are crucial in cleavage formation in democracies. He argues that it is the political entrepreneurs who crystallize certain cleavages over others, no matter what the 'distribution of preferences' in the society are. Likewise, LeBas (2006) describes the role of political parties in polarizing politics in Africa: in new democracies, party leaders can trigger polarization around a narrow cleavage that serves their purpose of popular mobilization and creating a loyal constituency base. But the mechanisms unleashed in the process do not respond well to the later maneuvering efforts of the same political leaders that crafted polarization. In other words, even if the political parties later want to control these mechanisms of polarization and minimize their effects, they cannot do so because these mechanisms are self-reinforcing. As polarization extends into other areas of social interaction and sharpens 'us versus them' identity politics, interactions along all other planes cease to exist, channels of communications between groups break down, and intra-group solidarity increases at the expense of inter-group cohesion.

Palonen similarly describes polarization as a political tool used by the political elites to demarcate frontiers between two rival groups. (2009:321):

The dominant political frontier creates a point of identification and confrontation in the political system, where consensus is found only within the political camps themselves. Polarization is reproduced in all political and social contests with an intensity that distinguishes it from mere two-party politics. It is a totalizing system, as it aims to dominate the existing system of differences and identities (2009:321).

Hungary is an example of political entrepreneurs driving polarization. The absence of any clear left-right ideological divide in the wake of transition to democracy, prompted political leaders to emphasize differences based on cultural issues instead of solid policy preferences. Palonen reinforces Vegetti's notion above that the polarization dividing Hungarian society appears not to be a deep-rooted one, but rather a contemporary invention by the political elite when she writes:

‘In Hungary, the two populist coalitions continuously construct themselves against each other. Avoiding policy preferences, the parties or camps exist through their common opposition to one another, with a consequent normative-ideological logic; as you are the bad ones, we are the good ones. The momentum is maintained through continuous politicizing of notions such as nation, identity, the past and the “people”’ (2009:322).

Referring to the Turkish experience, both Somer (2016) and Kosebalaban (2016) argue that Turkish polarization is a political elite-driven process where the secular/religious divide is reinforced and maintained by the powerful elite. In the Venezuelan case, the division between Chavistas and anti-Chavistas reflects an existing socio-economic divide in the population, as explained by both Lozada (2014) and Garcia-Guadilla and Mallen (2016), but it was Chávez’s confrontational strategy of change and the coalition of political, economic and social leaders who coalesced into an anti-Chávez opposition (with many stark ideological differences among them) that polarized the polity and society so deeply.

#### *Civil Society and Military Drivers*

Nancy Bermeo argues in her Seminal Work *Ordinary People in Extra-ordinary Times: The Citizenry and Breakdown of Democracy* (2003) the importance of civil society in contentious politics. She breaks down polarization into public and private spheres in making her case. The private sphere involves voting and polling where individuals can anonymously express their opinion. The public sphere is where demonstrations and protests take place and civil society plays a large role in bringing the people out of their private sphere to the more public ones. According to Berman, we mistake the polarization of civil society in the public sphere as the polarization of ordinary people in the private sphere.

Organized civil society contributes to polarization in two ways. First, polarizing political leaders can create civil society organizations to support their own political movements, as Fidesz did in Hungary by creating a network of organizations called “civic circles” to promote political and non-political activities such as blood donations, petitions and fund-raising campaigns (Vegetti 2016: 4), and Chávez did in Venezuela in creating Bolivarian circles and a number of successor organizations.

Second, organized civil society can ally with political and/or military factions opposing the new political group in power to actually attempt to remove that incumbent and/or political movement from power. In the cases of Venezuela, Egypt and Thailand, civil society movements allied with military factions to overthrow the respective incumbents Hugo Chávez (short-lived coup), Morsi and Thaksin (Arugay, Kongirati, Sallam, Wickham, Slater – 2016 Workshop Memos).

***Individual level: Social psychology mechanisms of polarization***

Political and social psychology literature has made great progress in understanding how communication and social interactions can either augment or ameliorate situations of polarization by increasing intra-group social cohesion and decreasing inter-group bond. For our project we draw from this literature to understand group identity formation and its repercussions for social cohesion, solidarity, prejudice and stereotype.

Based on in-depth review of the literature of social-psychology, Baldassari et al. (2007) identify three social psychological processes that help explain how polarization as a process unfolds, drawing on experimental studies to explain “group polarization phenomena”. These three inter-related processes activate and/or reinforce polarizing ideas and perspectives through interaction with people sharing similar views. The *persuasive arguments* explanation show that talking to people who share one’s perspective might help them become exposed to additional arguments in favor of their initial attitude, which further polarizes their original position. The *social comparison* explanation focuses on the ‘commitment’ aspect of attitude polarization. It explains that when group members come to realize that other members also share similar attitudes about something, they become more committed to their initial position (Myers and Lamm 1976 cited in Baldassarri and Bearman 2007: 15).. Last but not least, *Repeated attitude expression* explains how repetition of the same attitude over and over again through social interaction can harden an individual’s position (Brauer, Gliner and Judd 1995 : 792 cited in Baldassarri and Bearmann 2007: 15) These social psychological arguments indicate that for opinions to be polarized along mutually exclusive identity markers, social interaction with like-minded people is necessary. It is only when people are exposed to ‘convincing’ polarizing thoughts and ideas through repeated and frequent interactions with like-minded people that they begin to form a coherent, broad-based, solid and extreme position that pits one group against the other. This kind of reasoning has some merit in understanding why and how individuals with extreme opinions can influence



the group dynamics. Somer's analysis of ethnic polarization in Yugoslavia (2001) using the cascade model best describes this process where private individuals sharing certain opinions can solidify their 'divisive image' of the society coming into close contact with people sharing similar views. To quote Somer (2001;130): 'By the logic of cascade processes, if the number of social and political significance of the initial advocates of an action, belief, or norm reaches a critical level, the balance will tip in favor of that action, belief, or norm for a greater number of people, who will change their behavior accordingly. Therefore, in the case of ethnic polarization, divisive ethnic entrepreneurs constantly try to tip the balance of incentives in favor of holding the divisive image and undertaking actions that directly or indirectly promote it....If they succeed, they trigger a chain reaction of individual responses. People who previously were indecisive about or opposed to the behavior in question jump to the generated bandwagon along with those who had been advocating it all along.'

So, communication and social interaction are at the heart of crystallization of polarizing opinions, worldviews and identities. Social interactions, when conducted only within a seemingly homogenous group, can actually increase the distance between groups that are at conflict in society. As mentioned earlier, when polarization takes place we see greater identification and interaction with in-group members and concomitant distance from the out-group ones (Esteban and Schneider 2008; King and Anderson 1971). In other words, polarization increases the social capital (measured in social trust) within the group while decreasing it in inter-group relations. In Putnam's 1993; 2000) schema this is a tension between 'bonding versus bridging social capital'. It is the missing trust, defined as 'a sentiment linking us to other people, to work cooperatively with them on common grounds' (Ulsaner and Brown 2005) that is responsible for the intolerance toward the out-group.

Trust, as a sentiment, can be further broken down into two categories--particularized trust and generalized trust. While particularized trust matches Putnam's formulation of bonding social capital because it is confined within an individual's own group, generalized social trust matches his formulation of bridging social capital as it extends to members of the out-group. In a broader formulation: "We see generalized trust as moral idea linking us to strangers, to people who may be different from ourselves. It is not largely based on our experience as adults, especially our

participation in most civic and political life...Instead, generalized trust rests on a worldview stressing optimism and a sense of control....” (Ulsaner and Brown 2005:4).

But where does this generalized social trust, so crucial at thawing the social and political tension in a deeply divided society, come from? Social interaction is the answer here. There is a rich stream of literature on the relationship between diversity and trust that suggests that direct and meaningful social interaction leads to the end of stereotypes and greater positive feelings about out-group members. In a meta-analytic test of social contact theory, Pettigrew and Tropp (2006) found that inter-group contact generally reduces inter-group prejudice. In a similar study in 2008, the same authors discovered that such inverse relationship between contact and prejudice holds true for all kinds of settings and group relations beyond racial and ethnic ones. The flip side of the argument is that lack of such direct contact between groups lead to heightened suspicion and intolerance. For example, Bobo (1988) observes that in the American context, lack of direct contact with people from different socio-economic, ethnic and racial backgrounds has contributed to the reinforcement and strengthening of prejudices (cited in Stolle et al. 2008:59). Similarly, Letki (2008:120) found in her study on diverse neighborhoods in Britain that ‘interactions improve perceptions of a neighbourhood, regardless of its economic status or racial composition, but these interactions are far less frequent in poorer neighbourhoods.’ Schlueter and Sheepers (2010) came up with similar findings in their study where inter-group contact is negatively associated with ‘anti-immigrant discriminatory intentions and disapproval of immigrants’.

Polarization reduces opportunities for social interaction and communication between different groups as boundaries between groups become reinforced. One of the reasons that people tend to decrease interaction with the out-group and increase it within the in-group is *homophily*. People have a ‘natural aversion to heterogeneity’ (Alesina and Ferrara, 2002:225). We like to socialize with people who share common traits with us in terms of income, race, or ethnicity (Letki 2008; Alesina and Ferrara, 2000: 850; Costa and Kahn, 2003; ). Homophily reduces the barriers to communication within the group and also lessens *group-anxiety*, defined as ‘feelings of threat and uncertainty that people experience in intergroup contexts’ (Pettigrew and Tropp 2006; 767).

Homophily also obstructs communication and interaction between diverse groups. As McPherson et al. (2001:415) points out:

Homophily in race and ethnicity creates the strongest divides in our personal environments, with age, religion, education, occupation and gender following in roughly that order. Geographic propinquity, families, organizations, and isomorphic positions in social systems all create contexts in which homophilous relations form. Ties between non-similar individuals also dissolve at a higher rate, which sets the stage for the formation of niches (localized position) within social space.'

But does *homophily* always correspond to an objective depiction of similarities and differences between groups? In other words, is the difference between groups perceived or real for *homophily* to be triggered in a polarized society? Cristancho (2016:2) thinks that 'polarization depends on how individuals characterize groups, and how they sort others into them according to their perceived similarity'. Our workshop participants have pointed out that polarization as a discourse-driven process can exaggerate differences between groups to activate exclusive identity markers and alignments. The rhetoric and symbols used in the politics of polarization creates this sense of an 'us versus them' situation with mutually exclusive identities. Such depiction of the out-group also instigates the stereotypical idea that these conflicting groups are homogenous in their own make-up, meaning members within each group are similar in terms of opinion, attitude and behavior along with other more visible features like race/ethnicity/religious orientation/economic status etc. As we learn to perceive the 'others' as the homogenous and morally inferior enemy, we tend to grow closer to our own group, decreasing the options for interactions with the 'other' on a daily basis. In cases where polarization takes a physical-spatial form like that in Venezuela, such stereotypical notion gets a further boost by physical segregation and feeds on the existing feeling of antagonism.

Although interaction is key to the destruction of these stereotypes and creating common identities, not all kind of interactions can lead to reduction of hostility and animosity. Previously held attitudes and beliefs can be a remarkable barrier in this regard: even after coming into direct contact with a stereotyped Other, a person's prior beliefs about the Other may be reinforced rather than improved. In a process known as biased assimilation, we take cues from our prior experience and beliefs to guide how we will receive and respond to new information that may alter our pre-existing worldview (Geoffrey and Ditto 1997). Further, the quality and content of the inter-group interactions also determine whether it will have a positive or negative impact on

relaxing inter-group tension (Ratnesh 2006, ). As Allport (1954) identifies, there are four pre-conditions for inter-group interactions to be successful in bringing about the desired outcome. Popularly known as intergroup contact hypothesis , the conditions include equal group status within the situation, common goals, intergroup cooperation and authority support in social interactions.

Newer generations of scholars have further improved the theory by identifying the necessary/sufficient elements in social contact theory. For example, inter-group communication in the context of extreme power disparity, evidenced in socio-economic status difference or modes of inclusion in political power, or where social relations are ordered along morally superior/inferior lines, will not create a conducive environment for positive social interaction between antagonistic groups. Similarly if the two groups cannot identify any common purpose to achieve and are unable to point out sectors of cooperation for mutual gain, mere interaction will not lead to a positive outcome. Further, if such interactions are not sanctioned by the authority, such exercises will be futile in nature. Only communication processes that involve dialogue on equal footing and criticality can produce better result in terms of building alliances to stop the reproduction of power inequality between groups (Nagda 2006).

### ***Structural and Institutional Drivers of Polarization***

There is debate over whether the existence of deep structural forces such as ethnic/racial fragmentation, income inequality, or cultural clashes are necessary for polarization to take place. Our preliminary analysis suggests that pre-existing social cleavages may be necessary, but not a sufficient condition for polarization. So even though cleavage politics might be the best expression of polarization, these cleavages do not inevitably produce conflicts of interests. Referring to the ethnically diverse societies in Africa, LeBas (2016) argues that too much diversity actually impedes polarization because such situation represents fragmentation.

In the Greek context, the past divides between traditionalists and modernists only took a pernicious polarizing form when economic hardship hit them. As Stavrakakis explains, in Greece the struggle over maintaining traditional Greek identity and adopting to the new era of European integration has created a continuous tension between the two camps. But it only took a populist-polarizing form when Syriza rose to power with an anti-austerity rhetoric that puts people in the

center and rejects any proposal of austerity measures that comes from Greece's ties with the 'external Troika' (EU, IMF and World Bank). It is a slightly altered manifestation of the old debate between the 'cultural underdogs' and the 'modernist elites' (Stavrakakis 2016:12) where 'Cultural underdogs' are termed as the populists and the 'modernists' as the anti-populist ones.

In the context of post-communist Hungary, economic or class conflict divides were not an option for politicians from reformist communist parties adopting market capitalism. Thus, they turned to a cultural dimension as a polarizing electoral strategy, with elite discourse emphasizing a nationalist- cosmopolitan divide as the dominant cleavage to polarize politics, subsuming other cleavages such as urban/rural, religious/secular, and authoritarian/libertarian (Vegetti 2016:5-6).

Although pre-existing social cleavages are not a sufficient condition for the activation of polarization in most countries under study, there is still a historical-institutional element to it. If identity is not directly related to polarization and often a proxy for it, unequal political and economic opportunities, legal limitations to access to power and ill-conceived power-sharing arrangements with certain 'outsiders' of a society is at the heart of grievance politics that gives rise to polarization. These cleavages are very real and often align with other group identities (ethnicity, religion etc.) of 'have' and 'have-not' groups in the society.

The institutional design that favors one kind of political opponent over the other is responsible for generating polarization in cases as diverse as Thailand, Taiwan, Egypt and Turkey. As Slater so aptly puts it, it is the eternal struggle between the oligarchs and the populists to secure either horizontal (constraints over executive power) or vertical (inclusion of the left-out groups) that facilitates polarization. Drawing on the examples of Asian democracies, Slater argues that anti-establishment 'outsiders' who have historically been denied access to power for one reason or the other, relies on populist narrative and rhetoric to claim their position in state power, while the establishment cautiously guards all the entry points to the power structure. The irreconcilable clash of interests between these two groups polarizes politics and ramifies into the wider society.

### *Historical legacies*

The politics of polarization is also path-dependent. Kosebalaban, for example, explains how in the formative years of the Turkish state in the early 20<sup>th</sup> century, the state suppression of Islamic values from social life and Islamic actors from the political ones created an Islamist backlash that defined the Islamist/secular divide in the country. But he argues that there are other cross-cutting cleavages that this simple dichotomous formulation of polarization cannot capture properly. By the end of the twentieth century, a few decades after the introduction of multi-party democracy, a second division became salient -- that between the globalist (pro-integration with Europe) and the nationalist (keeping a safe distance from Europe). The issue of integration cuts across the division over the place of religion in the society, particularly in terms of foreign policy orientation. In this view, Turkey became polarized along two dimensions (globalist-nationalist and religious/secular), creating four camps: 1) Liberal Islamism; 2) Liberal secularism, 3) Nationalist Islamism and 4) Nationalist Secularism. Although the governing AKP party started its journey under Erdogan as Liberal Islamists, Erdogan is moving toward Nationalist Islamism with a potentially stronger unidimensional polarization emerging.

Another example of a path-dependent mechanism of institutional exclusion and repression giving rise to polarization is explained by Sallam (2016) in his case study of Egypt. He traces the root of failure of Islamist and secular forces to cooperate to sustain democracy in Post-Mubarak Egypt back to the state policies of the 1960s. Since that time, the Egyptian state has been pursuing a dual policy that created two different trajectories for the organizational development of the secular and Islamist forces in the country. While the state co-opted the leftists by convincing them to dissolve their organizational structure and become a part of the ruling party, it followed an 'inclusionary' approach to the Islamists that gave the latter more freedom in Egyptian political and cultural space. The result was an erosion of autonomy and generational fragmentation between the old and new guards for the Leftists, while an independent organizational structure and mobilization capacity for the Islamists with a strong bond between leaders of different generations emerged. In the post-Mubarak era, this organization strength gave the Islamists an electoral advantage over the secularists.

This discrepancy in organizational capacity sowed the seeds of future discord between the seculars and the Islamists, culminating in the overthrow of Brotherhood regime and retreat into authoritarianism in post revolution Egypt. The fact that seculars felt uncertain about ever coming

to power through electoral means because of Brotherhood's consecutive electoral success after the overthrow of Mubarak reveals how deep rooted those insecurities are in a 'winner-takes-all' political culture that fails to create 'contingent consent' based upon assurance of rotation of power.

Wickham (2016) complements this discussion of historical legacy in Egypt by examining the "habits of mind" emerging from past treatment by state authorities. She argues that initial conditions create certain psychological frames that shape the perceptions and decision of political actors long after those initial conditions cease to exist. The Egyptian state created an environment for the Islamic opposition to rise in a very constrained political space, where mistrust of the secular counterparts and insulation from the 'outsiders' were common features. These two habits help explain why the Brotherhood leadership made the blunders of overestimating their popularity and capacity in running the country once they won electoral office in the post-Mubarak era. In Wickham's words (2016: 4): 'the Brotherhood entered the political fray in the wake of the uprising with habits forged during its long years at chronic risk of repression, including an emphasis on secrecy, a lack of transparency, and a stance of aloofness from – and suspicion of – outsiders, all of which were particularly ingrained among members of the organization's "old guard" who monopolized seats on its executive board.' That is why Morsi's government ignored the mass dissatisfaction of their performance, trivialized their intent to overthrow the regime, refused to give secularist opponents more voice in drafting the constitution, and declined to give the international community a chance to broker a deal between the opposition and the government. Similar sticky 'habits of mind' also prohibited the secularist political forces from negotiating with the Brotherhood and compromising on controversial issues.

The "habits of mind" argument as a historical legacy may also be applicable to Turkey. As Somer (2016) points out, the secular Turkish state has always preferred the 'moderate' Islamists over the pious ones in politics, thus creating a sense of 'disempowerment' in the pious Muslim citizens and politicians and facilitated secular-Islamist polarization. Although political Islamist parties were contesting in elections, they were regarded anti-systemic elements in politics. This sense of mistrust is an ever present feature of Turkish politics and the consequence of an active state policy to treat political Islam as the 'pariah' political force in the country. The lack of trust

undoubtedly contributed to the failure of the Islamists and secularists to forge a power sharing arrangement that would benefit both when AKP first came to power.

### *Institutional factors*

Institutional design provides incentives and opportunities for political leaders and parties to polarize or build broad coalitions. Highly majoritarian electoral systems, whether parliamentary or presidential, tend to create bi-party systems or bipolar coalitions, often with a winner-take-all character. Once polarizing electoral strategy takes hold along a single dominant dimension, it becomes very difficult for parties to present an alternative discourse. Such electoral systems proved advantageous to polarizing leaders in countries as diverse as Thailand, Venezuela, and Hungary. Thaksin in Thailand and Orban in Hungary came into power on the strength of constitutions providing for strong prime ministers and disproportionate electoral advantages to the majority party or coalition. Chávez in Venezuela lacked those advantages initially but oversaw the writing of a new constitution his first year in office providing similar advantages, while Orban was able to use his initial parliamentary majority to enact electoral reforms exacerbating the disproportionate character of the majoritarian system.

The perception of a winner-take-all scenario further exacerbates polarization as opposing parties elevate the political contest into a moral one, vilifying the opponent and refusing to cooperate with a legislative agenda. This pattern can be seen from Hungary to Venezuela to the United States. Similarly in Thailand, Kongkirati explains that the electoral success of Thaksin and the constitutional changes bestowing him with disproportionate power and authority created insecurity for the opposition party, especially in the light of their weak organizational capacity and small constituency base (urban affluent people). Consequently, they forged networks with the military and the royalist bureaucracy just as the same way Egyptian secularists allied with the military to overcome the power and popularity of the Morsi regime.

Political party systems present another institutional factor affecting polarization. Handlin (2016), for example, explains the rise of radical political forces in Latin America in terms of the development of the party system and how it interacts with what he terms as the deep state crisis. Deep state crisis refers to a situation where the state is no longer able to provide basic services or



distribute resources efficiently and fairly. But the occurrence of such deep state crisis alone cannot produce political polarization. The existence or absence of strong Left parties from the formative years of these countries determines whether a deep state crisis will instigate polarization and a politics of exclusion. In cases where Left parties have not had well established structures and strong mobilization capacities, deep state crisis led to polarization as ‘pro-system’ agendas were disfavored by the voters and the moderate political leaders experienced challenge from the radical factions within the parties.

In lieu of a conclusion, we summarize our conceptual framework in the table below.

# TOWARD A FRAMEWORK FOR POLARIZATION

	Definition/Description	Country Examples	
<b>Type of polarization</b>	<b>Overall definition</b>		
Political	The normal multiplicity of interests and identities in a society align along a single dimension, splitting into two opposing camps with impermeable boundary and perceived zero-sum interests and mutually-exclusive identities. Adversaries become enemies to be eliminated.	Egypt, Turkey, Hungary, Thailand, Venezuela, Greece, Bangladesh, United States	
Societal	Citizens internalize the partisan divide in their daily life spatially and socially, and view the “other” as posing existential threats to their way of life.	Bangladesh, Venezuela, Turkey, Thailand, Greece, (emerging) United States	
<b>Dimensions of cleavage</b>			
Single dimension	Cleavages overlap to point of forming a single boundary between two camps, with one cleavage becoming the dominant one in political discourse	Venezuela, Egypt, Hungary, Thailand, Bangladesh	
Multiple dimensions	No single dimension is dominant in political discourse, but multiple cleavages aligning into two camps	Greece and Turkey? United States	
<b>Types of Cleavage</b>		<b>Dominant discursive cleavage</b>	<b>Underlying</b>
Populist – elite/people		Venezuela, Thailand, Greece	
Religious/secular		Turkey, Egypt, Bangladesh	
Globalist/nationalist		Hungary, Turkey, Greece	
Cultural -- Traditional/modern			Greece, Turkey
Urban/rural		Thailand	
Economic ideology – market/socialist; austerity/anti-austerity		Greece	Venezuela
Political Ideology – concept of democracy (participatory/liberal; royalist/liberal)			Venezuela, Thailand
<b>Polarization driver</b>			
Elite-led		Turkey, Egypt, Greece, Hungary, Thailand, Venezuela, Bangladesh	
Societal-led		Latent societal drivers in Thailand and perhaps in Venezuela and Greece	
<b>Outcome for newly-included group/leader</b>	<b>Outcome for democracy</b>		
New incumbent/group removed from power; return of old elite	Possible democratic collapse	Egypt 2013, Thailand (2006,08,2013), Venezuela and Turkey (attempted)	
Alternation in power or divided government	Gridlock; instability; democratic careening	Greece, Thailand (2006-15), Bangladesh, Venezuela (2015-16), United States	
Newly-included group/incumbent stays in power through growing authoritarianism	Democracy under threat	Turkey, Venezuela (2004-13), Hungary	

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