Scapegoating narratives in political economy:

an overview of theoretical and empirical approaches

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UC Berkeley research visit report

Abstract

This report is linked to a research visit to UC Berkeley funded by the Austrian Marshall Plan Foundation. It summarises recent and ongoing work to formally analyse the role of political scapegoating narratives, both from a theoretical and empirical perspective. Building on an emerging literature, the paper gives a definition of the elusive concept of narratives, arguing that scapegoating narratives are particularly important in shaping political outcomes. It proceeds to outline a formal framework on how to model scapegoating narratives within a political economy setting, and discusses methodologies on how to empirically measure such narratives. It then provides an application to anti-immigrant scapegoating narratives in the US Congress and UK House of Commons.

1 Narratives: omnipresent and elusive

The concept of "narratives" has recently captured the attention of the general public and researchers across the social sciences. A simple Google n-gram analysis makes this point plainly: Figure 1 plots the frequency of the word "narrative" among the entire corpus considered by Google's n-gram database, which spans a large body of books written in English.[1] Since the 1980s, the relative mention of "narrative" compared to other words increased by a factor of four. In line with the general trend, social scientists have started putting increased emphasis on this topic; the study of narratives is becoming mainstream. One group of political scientists put it very strongly: "Policy narratives", write Shanahan et al. (2011), "are the lifeblood of politics". In economics, the focus of this paper, a call to take narratives seriously has come from established figures, including Nobel Laureate Shiller (2017, p. 967): "The field of economics should be expanded to include serious quantitative study of changing popular narratives."

Figure 1: Relative frequency of "narrative" in the Google n-grams corpus
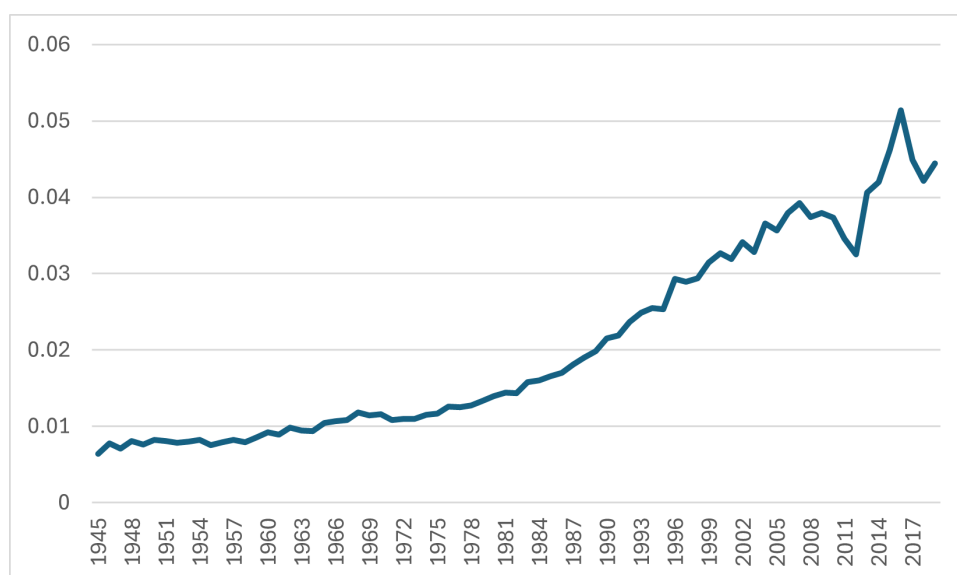
Many social scientists and humanists have heeded this call. The first obstacle of doing so is to find a suitable definition that captures the breadth and flexibility of the term "narrative" while not generalising it into meaningless. Across and within

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[1]The Google n-grams viewer can be accessed on `http://books.google.com/ngrams`. See also Michel et al. (2011) for the original paper.

disciplines, different researchers have come up with different definitions. However, discrepancies should not be exaggerated and some common threads can be made out fairly easily, as the following non-exhaustive list of existing definitions shows:

1. In line with a longer tradition within psychology, Tuckett and Nikolic (2017, p. 5) define narratives as "a process that allows us to construct the everyday meaning of events and happenings along with their causal implications."

2. In philosophy, Currie (2010, p. 27), describes the content of narratives as "sustained tempora-causal relations between particulars, especially agents."

3. In political science Shanahan et al. (2017, p. 178) characterise one central narrative strategy as defining "causal mechanisms", which "strategically arrange narrative elements to assign responsibility and blame for a policy problem. These responsibility and blame ascriptions can be thought of as explanations of why and how one or more particular factors (e.g., income disparities and lack of education) lead to another (e.g., political unrest) in public policy."

4. In economic theory, Eliaz and Spiegler (2020, p. 3787) note that "political narratives can be regarded as *causal models* that map actions to consequences."

A common thread across these definitions is the causal nature of narratives.[2] By linking causes to outcomes, narratives allow agents to make inference about what brought about the consequences they face, or to predict what will happen after the actions they are about to take. In this paper, I follow the literature in viewing narratives as subjective causal models of how the world works, following also my definition of earlier related work (Brzezinski, 2023). The term *subjective* highlights a key aspect of narratives: they may or may not accord with factual evidence.

It is this subjective element which distinguishes the narrative approach from earlier ones in economics (and the social sciences more generally). Before that, the *modus operandi* of the economic theorist was to firmly nest beliefs in data, not allowing much of a role of narratives in the sense of subjective causal models

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[2]There are, of course, also differences in definitions. For instance, some definitions highlight the role of protagonists (Shanahan et al., 2017) or storytellers in narratives, while others abstract from them (Eliaz and Spiegler, 2020).

that may not coincide with evidence.[3] The assumption of data-consistent beliefs was, and to a large extent still is, dominant across the different sub-disciplines of economics. In game theory, beliefs are usually tied neatly to data via Bayes' rule, and in equilibrium beliefs about hidden types or actions turn out to be correct. In macroeconomics, the assumption of rational expectations leads to common truth-centered beliefs: economic agents not only know the relevant model and agree on its parameters, they also, on average, correctly predict outcomes of uncertain variables of interest.

Nash equilibrium, rational expectations, and related concepts are useful for solving complicated models and forming testable predictions about the real world. While there is something magical about beliefs being correct in equilibrium, this can to some extent (and usually in a somewhat hand-waving matter) be tied to learning or evolutionary reasoning. More to the point (at least in the opinion of some pragmatists), models built on data-driven beliefs often fare well when put to test against the data in many applications.

On other occasions, however, beliefs are driven by factors other than facts. Indeed, some beliefs are consciously and explicitly "anti-fact", in the sense that they are founded on denying a fact-based consensus. Science skepticism is the ultimate example, with important repercussions for the effectiveness of policies, such as adherence to lockdowns during the COVID-19 pandemic (Brzezinski et al., 2021).

There has been some reluctance to model beliefs as not ultimately grounded in data, in economics and the social sciences more broadly. Some of this reluctance was driven by the seeming lack of an alternative assumption that is more convincing. If beliefs are not driven by data, what are they shaped by? The assumption that beliefs are related to the evidence that they are meant to represent is intuitive; once we depart from that, the fear is that "anything goes", and we will fail to be able to make any meaningful models of human behaviour.

Recent advances in evolutionary psychology have helped to clarify the origins of reasoning capabilities and given firmer scientific grounding for approaches that

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[3]This generalises, to different degrees, to other social sciences, including psychology; see the introduction of Boyer (2018).

do not ground beliefs in data (see Haidt, 2012; Boyer, 2018, for overviews of the topic). This literature highlights the fact that human evolutionary success lies in "groupishness": we cooperate to degrees scarcely visible in other species. Hierarchies within groups as well as competition between groups are hard-wired into our brains. Reasoning, then, is not only, or in some situations not even primarily, driven by the need to correctly understand causal relationships that govern the physical world. Instead, a key function of reasoning lies in shaping narratives to try improve one's own status within a group.

These advances in our understanding that beliefs are not only, or not even primarily, data-driven, does not constitute the birth of a new idea, but rather the renaissance of an old one. There is a rich history of distrust of rational beliefs in philosophy and religious thought, among characters who do not exactly constitute fringe figures of history. Blaise Pascal quipped that "people almost invariably arrive at their beliefs not on the basis of proof but on the basis of what they find attractive"[4]. Similarly, Montaigne viewed rationality as a means to justify preexisting notions (Montaigne, 1760 [1580]). Before that, Martin Luther put his distrust of reason in particularly strong language, that is perhaps best left omitted here (e.g. Luther, 1901 [1546], v. 51, p. 126). Perhaps most well-known is David Hume's qualifications of the power of reason: "Reason is, and ought only to be the slave of the passions, and can never pretend to any other office than to serve and obey them" (Hume, 1739, T. 2.3.3.1, SBN 413). For Hume, this meant that reasoning capabilities in themselves cannot come up with moral ends, which have to come from elsewhere—reasoning can only help to achieve these ends. He thereby criticised moral philosophy that argued for achievement of a moral life based on reasoning alone.[5] Evolutionary psychology contextualises this critique of reason, and can be seen as going one step further: not only our motives, but the beliefs that we form in order to achieve them, are outside the tight control of logical reason.

The uprooting of beliefs from their firm ground of evidence empowers narratives to shape them, with repercussions for all areas of social science. In this paper, I

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[4]The quote appears in the French original in Pascal (2018 [1658]); the translated version is taken from https://en.wikiquote.org/wiki/Blaise_Pascal.

[5]See https://plato.stanford.edu/entries/hume/ for an elementary discussion of this point.

confine myself to studying narratives as they appear in politics, where they influence beliefs on a grand scale, and with significant effects. Moreover, within narratives, I focus on those that have an explicit scapegoating aspect. Political scapegoating narratives assign blame for unfavourable outcomes experienced by the narrative's target audience to another group cast as being in opposition to them, or to extraneous factors described as being outside of their control.

The purpose of this paper is to discuss how one can formally study scapegoating narratives within political economy. I hereby build on previous contributions across the social sciences and humanities, as well as my own related and ongoing work. I start my exposition in Section 2 by discussing why scapegoating narratives have power over humans, and why they are particularly potent in the political setting. In Section 3, I outline a formal way of thinking about scapegoating narratives in political economy. The section focuses on the intuition, but includes references to more formal work for the mathematically interested reader. Section 4 outlines methods to quantify narratives based on textual data. Section 5 gives a simple application of the theoretical framework and empirical methodology to study the evolution of anti-immigration scapegoating narratives in the US and UK over more than 60 years. I offer some concluding remarks in Section 6.

2 Finding scapegoats and avoiding being one

This is the excellent foppery of the world, that, when we are sick in fortune,–often the surfeit of our own behavior,–we make guilty of our disasters the sun, the moon, and the stars: as if we were villains by necessity; fools by heavenly compulsion; knaves, thieves, and treachers, by spherical predominance; drunkards, liars, and adulterers, by an enforced obedience of planetary influence[...]

—Edmund in *King Lear*, Act 1, Scene II (Shakespeare, 2024 [1606])

My working definition of narratives implies that their key function is to link causes to outcomes. For unsatisfactory outcomes, then, narratives uncover who or what has led to them. In other words, when things go wrong, narratives identify scapegoats—the assignment of blame related to grievances is intimately linked to the very concept of narratives.

Scapegoating fulfils, and has always fulfilled, significant societal functions. A simple function is that identifying causes of bad outcomes helps to avoid them in the future. Such an interpretation accords with a positivist view of beliefs, where scapegoating narratives are simply tools in a quests to find out the truth about what went wrong, allowing to rectify issues before more problems abound.

However, this positivist (and hopeful) instrumental view of scapegoating narratives fails many applications of interest. Science-skeptic narratives are not rooted in evidence; indeed, this is true by their definition. Xenophobic and racist narratives that repeatedly wreaked so much havoc on minorities are also not rooted in an objective truth, but serve instead other societal functions important to those who spread these narratives. Returning to the quote above from *King Lear*, scapegoating narratives are also effective at explaining away unpleasant outcomes for which we would like to avoid taking ownership. By finding external scapegoats, we avoid being the ones to blame.

All this shows that scapegoating narratives can perform important functions that are unrelated to any truth motive. To help categorise such potential drivers

of scapegoating, I will now turn to discussing three that have been firmly identified in the literature: neuroscientific foundations, adaptive advantage, and motivated reasoning. As with any simplification, separating drivers of scapegoating narratives into the above list of three is misleading. It suggests that the categories are exclusive, while this is clearly not the case: for instance, adaptive advantage drives the structure of the brain, and many narrative features do not neatly fall into just one of these categories. The list is also not exhaustive, in that there are many drivers of scapegoating narratives that I do not cover; understanding all of the drivers of scapegoating narratives and trying to identify which ones operate under which conditions would constitute research paper on its own. Nevertheless, the following list of three is, I hope, useful in fixing ideas on why we shouldn't be too surprised about the prevalence of scapegoating narratives.

- **Neurological foundations.**[6] The very structure of our brain gives an advantage to scapegoating narratives. One reason is that our brains are wired to detect threats; it is one of the more important abilities for survival which evolution equipped us with. This explains why we are very alert to scapegoating narratives, which are directly related to threat detection. The structure of our brains also favours scapegoating narratives for other, less direct, reasons. One is that we process and are more likely to remember simple narratives compared to more complex ones. Scapegoating narratives often simplify a causal story, by pointing the fingers at a specific cause for a misfortune, instead of allowing for more complicated accounts of what happened. Moreover, they can give certain answers to complicated questions, rather than admitting that the causes are uncertain.

- **Adaptive advantage.**[7] From an evolutionary perspective, there are reasons to believe that scapegoating narratives led to higher fitness of our ancestors. This is obvious in the case where scapegoating helps identify true causes of hardship. However, even false scapegoating narratives have aspects that can

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[6]See, for instance, Van der Linden (2023) for a more in-depth overview.

[7]Chapters 1-2 of Boyer (2018) includes a longer overview of some of the most recent research from evolutionary psychology.

improve evolutionary fitness, related to the "groupishness" of humans. One is that they can improve group cohesion. Acts of scapegoating are costly statement of membership of one social group, which burn bridges towards membership in other groups. Indeed, the more outlandish the scapegoating narrative, the more credibly does it burn bridges to other groups, and the more credibly does it act as a signal of loyalty. This logic mirrors attempts to explain acts of extreme violence, such as those occurring during a civil war. A related adaptive advantage of scapegoating narratives is that they can improve group recruitment: by leveraging our threat-detection module, scapegoating narratives can act as a powerful "call to arms", pitting one's "own" group against another.

- **Motivated reasoning.**[8] A large literature confirms the tendency of humans to interpret outcomes in motivated ways. Faced with alternative explanations as to what caused an unfavourable outcome, we prefer explanations that paint our own actions and personal traits, or those of people close to us, in a more positive light. This is not merely for the sake of keeping up appearances and defending our reputation: we are also prone to deceive ourselves in order to keep up our own self-worth.

Accordance with these three drivers of beliefs will determine the success and failure of scapegoating narratives. Whether or not such a narrative can successfully leverage the neurological foundations of our brain, factors that historically improved our adaptive advantage, or our tendency for motivated reasoning, will depend on the particular habitat of the narrative—its topic, the situation of the target audience, the characteristics of the narrator, and many more. However, we can list some general factors that improve the fitness of a scapegoating narrative relative to both fact-based beliefs as well as other types of narratives:

- **Inexistence or doubt about data.** When data does not exist, or is highly in doubt, trivially evidence cannot play an important role. In such cases of

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[8]Bénabou (2015) outlines theories and evidence of motivated reasoning for application in economics.

"radical uncertainty", conviction narratives will thrive, as argued by (Johnson et al., 2023): with no data to be guided by, people will instead adopt the beliefs that feel right. This gives room for scapegoating narratives, too, in particular when such narratives help agents to sustain their self-worth by avoiding taking the blame for unfavourable outcomes.

- **Complicated truth(s).** Related to the above, when the truth is very difficult to understand, it will be difficult to process by the brain, which may instead opt for a simplifying narrative. Things get complicated when the truth is highly conditional, taking the form of many "ifs" and "buts", or when experts from the field fail to reach a consensus. Some scapegoating narratives that unconditionally assign blame to particular entities can offer a sought-after simplifications in such situations.

- **No feedback from being wrong.** Some experiments have shown that incentivising people to hold correct beliefs will improve belief accuracy (e.g. Gächter and Renner, 2010), and a large literature exists on how to best incentivise belief accuracy (see Schlag et al., 2015; Schotter and Trevino, 2014, for reviews of the literature).[9] By implication, the reverse is also true: when not incentivised, beliefs can more easily become disjoined from the truth, giving more scope for scapegoating narratives to operate.

- **Strong feedback from avoiding blame.** Conversely, when there is a strong positive feedback from avoiding blame, scapegoating narratives will become more appealing, for two reasons. First, avoiding blame can help avoid being the target of others within the group, preserving one's status. This gives more of an adaptive advantage to scapegoating narratives, as discussed above. Second, it also allows one to uphold images of one's own self-worth. This aspect of scapegoating narratives links to our tendency for motivated reasoning.

- **Importance of group identity and cohesion.** In some topics of debate, group identity and cohesion plays more of a role. In such cases, scapegoating

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[9]See, however, Charness et al. (2021) for a recent review suggesting that more complex elicitation methods may fail to outperform simple introspection questions.

narratives will be more successful, as their use will become attractive to signal group loyalty, which historically has been of adaptive advantage. Moreover, by reinforcing group delineations, scapegoating narratives further increase the salience of group identity, reinforcing the attractiveness of their use.

These factors help the spread of scapegoating narratives in general. However, I argue that there are good reasons why scapegoating narratives should be particularly successful in political battling grounds.

2.1   Scapegoating narratives in political economy

In politics, the discussion of who or what is to blame is particularly dominant. Modern examples abound, but past political debates are no strangers to scapegoating either. Indeed, scapegoating narratives have changed world politics on many occasions. A well-known reoccurring example is the periodic persecution of religious minorities, with a devastating instance in the Holocaust (see Johnson and Koyama, 2019, for an overview of the economic history of religious persecution).

The power of scapegoating narratives is neither modern nor confined to democracies. Indeed, "Who is to blame?" is a deeply political question, and answering it also helps to answer the politically important question of "What is to be done?" to address the issues. A fitting and powerful illustration of this is to be found in the intellectual history of 19th century Russia. It is worth giving a more detailed account of this, to illustrate the power of scapegoating in shaping politics on a world stage: this is an account of how a deeply political novel asked an open-ended question as to the scapegoats for what is going wrong, with powerful answers ultimately given by those who led the Russian revolution. And, while this example will be known to enthusiasts of Russian literature, it may be less so to social scientists at large.

From "Who is to blame" to "What is to be done": An example from 19th century Russia

Alexander Herzen's novel "Who is to blame?" (Herzen, 1984 [1847]), published in full in 1847, became one of the most influential works of fiction in 19th century

Russia with a lasting influence on political debates and literature. The plot itself centres on a well-educated young landowner, who struggles to apply himself in a way that he or those around him view as useful. In a sub-plot, the protagonist engages in an affair with a married woman, which is discovered in a scandal that shakes the town. The married woman herself was "rescued" by her husband through marriage, which allowed her to escape an unfavourable situation at her parental house. On the face of it, these plots may seem politically innocuous. This is far from the truth: Who is to blame is a highly political question. Who is to blame for the fact that an educated, driven person cannot find occupations that are beneficial to society? Who is to blame for the misery of a woman who falls out of love with her husband? One may, and indeed many did, find the fault in the way that Russian society was structured — in other words, in its political system.

Many authors did find that antiquated Russian politics were to blame, and the questions posed by Herzen's novel spawned a fascinating literature which offered different answers. It is beyond the scope of this paper to go into the intellectual history of the responses, and responses to responses, which include the most illustrious Russian novelists such as Turgenev (2008 [1862]) and Dostoevsky (2008 [1864]). I will also omit the earlier roots of this literature of social misfits whose failure poses questions as to why their talents were wasted, which did not start with Herzen, but had precursors in Lermontov (2009 [1840]) and Pushkin (2009 [1833]).

Instead, I wish to focus on Chernyshevsky's novel "What is to be done?" (Chernyshevsky, 1989 [1863]), as a particularly powerful instance of a political rsponse. Chernyshevsky wrote his novel while imprisoned for political radicalism; by some miracle, his radical book was approved by the prison censor, and circulated widely upon publication. In it, Chernyshevsky answers Herzens questions in no uncertain terms: Russia's political system is to blame, and has to be changed. Its paternalistic structure places women at the mercy of despotic parents, who don't have their daughter's best interest in mind. As a result, women cannot choose freely whom to marry, leading to the sort of disasters that the novels above expound upon. Moreover, in Chernyshevsky's view, serfdom and the inequality of political rights are not

just bad in themselves, but prevent people of talent to achieve their potential, and curtail the economic development of the country. As a way out of the bleak status quo, Chernyshevsky's novel paints a vision of an agraro-communist utopia with wideranging equality and economic prosperity.

Many agreed with much of Chernyshevsky's criticism; some couldn't disagree more: Dostoevsky (2008 [1864]) wrote an entire novel, "Notes from the Underground", meant as a direct rebuttal of Chernyshevsky. However, those who agreed with Chernyshevsky prevailed, at least in the medium run, and the Russian intellectual history of answering "Who is to blame" ultimately culminated in the revolution of 1917. On the way to this revolution, Lenin (2008 [1902]) published his own manifesto on "What is to be done", not coincidentally borrowing the title from Chernyshevsky. It goes without saying that his answer on who is to blame for what he perceived to be the existing malaise had a lasting impact on the world.

Why scapegoating narratives are powerful in politics

Politics is a particularly fertile ground for scapegoating narratives. Returning to the list of factors that makes scapegoating narratives powerful even when they are not grounded in data, we should not be surprised about the proliferation of scapegoating in the political arena:

Scale and complexity of policy impacts. Policy topics are of such scale and importance that they are bound to be complicated. Multiple, often contradictory, analyses of the consequences of policy action coexist, giving flexibility in which one of a set of "alternative facts" to believe in. Academics sometimes disagree, and even when they do not, the consensus might have many conditionalities that elude a simple exposition. An example is the literature on the economic effects of immigration. As is typical for economic questions of policy importance, estimating the causal effect of immigration on wages or employment for native workers is complicated by the fact that a counterfactual is not directly observable, and experimentation is not possible. To get around this, some studies concentrate on natural experiments or instrumental variables, arguing that certain shocks will lead to an increase in im-

migration while being uncorrelated with other potential explanatory factors. For instance, Prantl and Spitz-Oener (2020) use the inflow of East German migrants to Western Germany after the fall of the Berlin wall, finding negative impacts on wages in the competitive segments of the labour market, but not in more regulated ones. Other studies use spatial models to investigate how immigration may have differential impacts across space. In this vain, Piyapromdee (2021) estimates a spatial model using U.S. census data, finding that effects differ strongly both across and within cities, among other things depending on the skill level of the workers considered, or the elasticity of the housing market.

For any given paper, questions inevitably arise about the validity of the exogeneity conditions, generalisability of the results, or suitability of the model used. Such questions are not easily scrutinisable even for economists, especially those from unrelated fields; they are entirely inaccessible for laypeople. With individual papers already full of "ifs" and "buts", generalisations are bound to be complicated. Indeed, a recent review paper by Edo (2019) notes that while the average effect of immigration on wages is usually estimated at negligible or slightly positive, this average masks significant heterogeneity: native workers whose skill profile most closely match that of immigrants may suffer wage losses; short-term impacts may be negative even if long-term effects are positive; and effects will depend on labour market rigidities. The question of the effect of immigration on wages simply does not admit a simple answer, and neither do most questions of policy importance. Some policy questions may even be in principle unanswerable, because the question cannot be defined in universal terms shared by everyone, such as whether immigration leads to "moral decline". In this epistemological mess, even brains with the best intentions will find some attraction in simple scapegoating narratives that point towards a clear answer.

Limited repercussions from being wrong. Voters face limited repercussion from holding views that are not grounded in truth. This is because voters are "atomistic": no single vote will change the policy outcome. For instance, holding incorrect beliefs about the effect of immigration on wages will inform the voting

decision of an individual, who mistakenly may vote for a policy that in fact harms their own prospects. However, the voter's mistake does not have any bite: had they voted otherwise, the outcome would still have been the same. This is a key difference to other areas in which beliefs operate: investors will face a direct loss from holding the wrong beliefs about trends in the stock market, or employers who base their beliefs on irrelevant information will end up with worse workers.

Even in these latter cases, when it is costly to take actions based on misguided beliefs, people still do it. For instance, the stock market and housing market is marked by "irrational exuberance", where prices systematically diverge from fundamental characteristics (Shiller, 2005). Apparently, people are willing to trade off holding hopeful beliefs against being correct; or, in the words of Bénabou (2015, p. 668), to trade-off "feeling better" against "performing better".

With political beliefs, however, such a trade-off may not even exist: voters can have the cake and eat it, too, by holding on to the narrative that is most beneficial to believe, given their circumstances. This does not have to be driven by "irrationality". Indeed, as argued among others by by Caplan (2008), if there is no feedback from being wrong, it is more rational for voters to be misinformed, instead of spending time on researching the precise impacts about policies, on whose implementation they have no impact.

There is a limitation to the lack of a trade-off between accurate and motivated beliefs in politics. Insofar as policy beliefs correlate with other beliefs that motivate actions, distorted beliefs about policy can spill over into actions in another domain. The framework of Little (2019) makes this point, arguing that a distorted "core belief" will also have repercussions for related "auxiliary beliefs". For instance, believing that policy unfairly favours immigrants in the labour market may lead to underestimating the returns to effort, leading to a pessimistic outlook that disincentivises putting in the work necessary to succeed in a job. However, these effects operate indirectly, and in many cases may not be if first-order importance. The fact that being wrong does not have immediately negative consequences means that other considerations may be more potent in shaping political beliefs.

The group-based nature of politics. Politics is, by definition, group-based. With its haggling over budgets that benefit some at the expense of others, it naturally pits groups of people against each other. Scapegoating narratives act to more strongly delineate the boundaries of groups, clearly separating an inside "us" against an outside "them". Repeating or coming up with scapegoating narratives can be seen as a way to signal loyalty to the own group, and can act in motivating others to become active in one's own group (Boyer, 2018).

Political group identity, in turn, changes the way that people form beliefs, thereby influencing who they blame for unfavourable outcomes. A substantial literature has documented differing moral views across supporters of competing political parties, with a particular focus on comparing left-leaning and right-leaning voters in Western democracies. Haidt (2012) documents that Conservatives in the U.S. tend to place more weight on values of sanctity and loyalty, while Liberals place more weight on care and fairness, among other differences. Against this backdrop, it should be expected that scapegoating narratives on the political right will focus more on outside groups, such as immigrants, while scapegoating on the left will be more focused on government failure to provide redistribution. Enke (2020) finds similar polarization between "universalist" and "communal" moral values in the United States, with the latter rising in particular in rural areas, which were more likely to vote for Donald Trump in the 2016 presidential election.

There are also substantial cross-country differences in political attitudes, which correlate with the prevalent scapegoating narratives and political institutions. In particular, citizens across countries differ in the extent to which they believe in the role of luck versus skill in generating economic outcomes, which correlates with cross-country differences in redistribution (Alesina et al., 2001; Alesina and Angeletos, 2005). Different believes in luck versus skill will also influence the particular form that scapegoating narratives have to take to succeed. If skill is believed to be important, narratives can thrive by blaming unfavourable outcomes on the characteristics of scapegoats, such as their intelligence or work attitude. Such arguments will be inherently less successful among people who believe that luck matters more

than the inherent traits of people in determining outcomes.

Substantial grievances.   Grievances dominate many political topics, calling for a suitable scapegoat to pin them on. The wave of right-wing populism across Western democracies is a particularly stark example. Unaddressed grievances are part of the force behind this wave, according to conventional wisdom. For instance, in a recent lead article, The Economist (2024) put it as follows: "National conservatism is the politics of grievance: if policies lead to bad outcomes, its leaders will shift the blame onto globalists and immigrants and claim this only proves how much is wrong with the world."

Social scientists have long pointed towards the importance of grievances for explaining voting patterns, predating by more than a decade the Brexit vote or the 2016 US presidential election. One example is the account of Frank (2004) trying to explain why Kansas, traditionally a Democratic state, had turned Republican, even though the majority of citizens would benefit from more, not less, redistribution. The author sees cultural grievances as an explanatory factor (though it is worth pointing out that others disagree; see Bartels et al., 2006). For Louisiana, Hochschild (2016) similarily points towards deeply engrained grievances for economic and perceived cultural decline in the rise of Tea Part support. Several other have studies have documented how grievances shaped support for right-wing views particularly among rural areas or the white working class (Abrajano and Hajnal, 2015; Gest, 2016; Wuthnow, 2018; Norris and Inglehart, 2019).

3   A simple framework of scapegoating narratives

Despite the large literature documenting the importance of scapegoating narratives, this aspect is largely missing from formal models of political competition in economics. In this section, I will summarise the intuition behind one approach of how to think about narratives in a political economy framework. I closely follow the exposition in my other work, both completed and ongoing, in particular Brzezinski (2023) and Brzezinski and Besley (2024). My framework, in turn, has been influenced by a body of existing models of narratives and motivated reasoning, which, for the sake of conciseness, I relegate to a footnote; a full literature review as well as more mathematical details can be found in Brzezinski (2023).[10] In the below, I will focus only on the intuition of the framework, with very light mathematical notation.

A simple exposition of the framework

Voters, causes, and consequences.   Consider a mass of voters, each of which is indexed by i. Let us describe each voter i by their vector of *outcomes*, y_i, and the *potential causes* for these outcomes, x_i and ϵ_i. The difference between the two types of causes is that the x_i reflects a voter's inherent characteristics and actions, such as their ability, their level of education, or their moral values. These factors shape a voter's self-worth, and voters are more content with themselves if they "score better" on these — it will soon become clear what I mean by that. In contrast, ϵ_i consists of outside factors that may shape outcomes but do not in themselves reflect on the voter. These may include things such as good luck, or the behaviour of other people outside of one's control.

Let us describe potential causes and outcomes in n-dimensional space, such that $x_i, y_i, \epsilon_i \in \mathbb{R}^n$. Voters can be thought of as multidimensional points distributed in this space, whereby the vector of zeros $\mathbf{0}$ will be the unconditional mean. The

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[10]On models of motivated reasoning, see Bénabou (2015) for a review and a framework. In terms of models of narratives in political economy, see Aina (2023); Eliaz and Spiegler (2020); Levy et al. (2022); Little (2019); Schwartzstein and Sunderam (2021). Few models on the political economy of scapegoating exist; for an early example with this element in a model of motivated reasoning, see Bénabou and Tirole (2009), and for a recent example in the context of policy narratives, see Eliaz et al. (2022).

dimensions can be thought of as different economic and sociocultural factors that people care about. Values above zero denote better than average outcomes, and those below worse than average outcomes.

If causes and outcomes were perfectly observable, then their relationship could be simply read from the data. To make things interesting, and also more applicable to the real world, consider the case where outcomes are observable while their potential causes are not. In the setting relevant to political economy, this is a reasonable assumption. Voters observe their wages, but have imperfect knowledge of the extent to which skill, luck, education, and other factors gave rise to them. Similarly, they may have perceptions of changing moral values, without being certain of what drives these changes.

Beliefs and narratives. To infer the underlying potential causes from the observable outcomes, each voter forms a *subjective belief* μ_i. They form their belief from the set of available narratives. Let us denote this set of narratives by N, with typical element n. Formally, a narratives n is a functions that maps from outcomes to causes: $y_i \rightarrow (x_i, \epsilon_i)$. In other words, a narrative is a subjective causal model that allows a voter i to infer what causes underlie their observable outcomes.

To simplify things further, let us assume that each narrative n can be in fact described by a scalar $\nu \in N \subseteq [0, 1]$. In particular, let us suppose that narratives take the form $x_i = \nu y_i$ and $\epsilon_i = (1 - \nu) y_i$. Intuitively, and without going into the mathematical details that would lead to such a representation, a narrative describes outcomes as being driven by a weighted average of inherent characteristics x_i (with weight ν) and outside factors ϵ_i (with weight $1 - \nu$). The more weight is given to x_i, the more closely will x_i resemble y_i, and the closer to $\mathbf{0}$ (the unconditional average) will be i's assessment of ϵ_i.

Let us define the *scapegoating narrative* as $\nu = 0$. This is the narrative that assigns no weight to x_i and full weight to ϵ_i. Under the scapegoating narrative, $y_i = \epsilon_i$, while $x_i = \mathbf{0}$. This narrative is disempowering, in the sense that it says that intrinsic characteristics play no role in shaping outcomes. But why is it a scapegoating narrative? To better understand this, we need to understand what

type of voter would choose this narrative.

Demand of narratives: how voters choose what to believe and who to vote for. Suppose that voters care both about their observable outcomes y_i as well as their unobserved characteristics, x_i. The latter will be functions of the adopted narrative and of y_i, as explained above.

The choice of narratives is constrained to the set offered by political narrators—parties. As will be explained in more detail below, there are two parties indexed by $k \in \{L, R\}$, each of which offers a narrative ν^k.

To model narrative demand, we need to make an assumption as to how people's inferred unobserved characteristics x_i enter their utility function. For the purpose of tractability, let us assume that there is an aggregation method that allows to sum up the n-dimensional vector x_i into a single scalar s_i. we can think of s_i as the *perceived social status* of i. In particular, denote an n-dimensional vector β, common to all i, such that $x_i\beta' = s_i$. The vector β can be thought of as containing salience parameters which determine the weight of each dimension in perceived social status. Given that x_i depends on the chosen narrative ν as well as the vector of observables y_i, we will write $s_i = s(\nu, y_i))$.

Further, let us suppose that how observable outcomes influence voter utility will be influenced by the set of policies of a party. Let us denote these by τ^k, which may have different effects across the distribution of y_i. Let us denote the post-policy values by $\tilde{y}(\tau^k, y_i)$. The policy τ^k may influence voter utility on some dimensions, but may have no bite on others.

A voter's utility from the narrative-policy pair of party k is then denoted by $u(\tilde{y}(\tau^k, y_i), s(\nu^k, y_i))$. Voters will support a party k instead of it's competitor l if their overall utility is higher from doing so, i.e. $u(\tilde{y}(\tau^k, y_i), s(\nu^k, y_i)) \geq u(\tilde{y}(\tau^l, y_i), s(\nu^l, y_i))$. We assume that there is a stochastic element to voting: voters will be more likely to actually turn out and vote for the party if the relative utility from doing so is higher.

Supply of narratives: how political narrators choose what narratives to offer. There are two parties indexed by $k \in \{L, R\}$ who compete in narratives and

policies. There are fixed policy differences in parties, in that their choice of τ^k is not perfectly overlapping. In particular, suppose that τ^L favours people who tend to score lower in the policy-relevant dimensions of y_i (policy of the "Left" party), while τ^H favours those who score higher (policy of the "Right" party).

In addition to choosing their policy, each party chooses a narrative ν^k which is a scalar, as explained above. Since narratives are what the framework is concentrating on, we make no restriction on the narratives that parties can offer.

What determines the supply of narratives? There are in principle many ways in which this can be modelled. However, as a simple benchmark, let us assume that parties are opportunistic and choose the narrative-policy pair ν^k, τ^k which maximises their probability of winning.

Timeline and political equilibrium: narrative demand meets supply. The timeline of the framework is as follows: Parties observe the distribution of y_i among voters. They then offer a narrative-policy pair ν^k, τ^k to maximise their probability of winning. Voters observe the set of narrative-policy pairs, and support the party under which their utility is higher. They are more likely to turn out to vote the higher is the utility difference across parties. After election takes place, the party with more votes implements its policy τ^k.

Note that the narratives that are observable in the data, ν^L and ν^R, depend on the strategic choice of parties. They will supply narratives that maximise their chance of winning, which depends on the distribution of y_i and the party's own set of policies, τ^k. The latter will determine who "their" voters are, and thereby shape their incentives of which narrative to offer. This has non-trivial implications as to which party—the left or the right—will leverage scapegoating narratives.

General insights from the framework. Even without providing mathematical details, the framework gives some useful insights into how scapegoating narratives operate and what patterns should be expected in the real world. A first immediate insight is where the demand for the narrative $\nu = 0$ comes from, and why it is appropriate to call it the scapegoating narrative: people with unfavourable outcomes weighted by their salience ($y_i\beta' < 0$) will prefer the narrative $\nu = 0$. This puts

blame on external factors ϵ_i for their overall unfavourable outcomes, allowing them to sustain their belief in an average social status $s(0, y_i) = 0$ instead of the alternative $s(\nu, y_i) = \nu y_i \beta' < 0$.

The framework also sheds light on who are the core voters, who always support one party no matter what the narrative is, and the swing voters, whose support depends on narratives. Voters with "average" social status ($y_i \beta' \sim 0$) will not be swayed by narratives and therefore constitute the core voters. Because they have an average social status, such voters must score (mildly) well in some domains and (mildly) badly in others. In particular, the core support of the right party consists of people who score well in the dimensions related to policy, but badly in the dimensions unrelated to policy. Conversely, the core support of the right consists of people who score badly in the policy-relevant dimensions, and well in the others.

Swing voters, on the other hand, consists of those who score badly in both dimensions, which will support the party that offers the narrative closer to 0. It also consists of those that score well in both dimensions, which will support the party that offers narratives closer to 1. This helps explain one of the puzzles raised by the literature, as to why low-income people would support a right-wing party that does not have their economic interests at heart (Frank, 2004; Hochschild, 2016). The framework suggests that such voters will be prepared to do this as long as the right party offers the stronger scapegoating narratives, which improve their perception of their social status. Similarily, the framework explains how high-income people would vote for high redistribution, even though that is not in their economic interest. This is the mirror image of the above: people who score well on all dimensions of observable outcomes will support the party that is less scapegoating, as such narratives improve their own self-image.

In terms of the supply of narratives, it is then easy to show that there will be a bifurcations towards the extremes, $\nu^k = 0$ or $\nu^k = 1$. Intermediate narratives will be missing, since core voters do not care about narratives, and swing voters prefer the extreme narratives. Moreover, when the observables y_i are distributed sufficiently symmetrically, there will be polarization in narratives, where one party offers the

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scapegoating narrative, $\nu^k = 0$, and the other the opposite, $\nu^l = 1$.

By explaining the factors that impact the supply of narratives from parties, the framework can help explain under which conditions scapegoating narratives will come from the political left and under which from the right. The framework suggests that this depends on how the policy-relevant dimensions of y_i correlate with social status $s(\nu, y_i)$, which includes dimensions that are not impacted by policy. If there is positive correlation between the two, then voters that score well in the policy-relevant dimension will also have a high social status, and voters that score badly in the policy-relevant dimension will have low social status. Demand for scapegoating will therefore come from those who score badly in the policy-relevant dimension, i.e., from "low-income" voters that benefit from the left policy. Faced with this demand, the left party will optimally opt for the scapegoating narrative to maximise its votes, while the right party will do the reverse.

The situation changes when the policy-relevant dimensions of y_i are negative correlated with social status $s(\nu, y_i)$. In that case, it is "high-income" voters who will demand the scapegoating narrative, and the right party will meet this demand.

Insofar as scapegoating is linked to populism, this logic helps understand part of the mechanisms that have led to a rise of right-wing populist parties in Western democracies. According to the framework, processes that break the correlation between policy-relevant dimensions of outcomes (such as income) and the social status of people, will give rise to right-wing populists that leverage scapegoating narratives. One reading of the existing literature on grievances, discussed in the previous section, is precisely that such a process has been happening: among those who now feel "left behind" are groups of people, such as white men,who feel a loss of status, even when they are economically not worse off than most. If social status and income no longer correlate positively, the framework suggests to expect a right-wing populist in political equilibrium.

4 Identifying scapegoating narratives in political speeches

The framework of the previous section showed how to decompose narratives into its three (minimal) elements: outcomes, causes, and the causal arrow between them. There is a precise analogue of these concepts to how narratives appear in use – that is, in textual data. In particular, following Ash et al. (2024), we can view narratives as containing a minimum of one subject (the cause), one verb (the causal arrow), and one object (the outcome). That is, every narrative can be reduced to a set of subjects, verbs, and objects. Of course, the reverse is not true: not every subject-verb-object triplet is a narrative, as there are some triplets which carry no causal meaning. For instance, "she is tall" is a description that does not imply any causal claim.

To make the appearance of narratives in textual data more concrete, consider the following, now infamous, part of a speech by Donald J. Trump from 2015, then a Presidential Candidate:

> When Mexico sends its people, they're not sending their best. They're not sending you. They're not sending you. They're sending people that have lots of problems, and they're bringing those problems with us [sic!]. They're bringing drugs. They're bringing crime. They're rapists. And some, I assume, are good people.[11]

If we concentrate on the explicit causal statements of this speech, we can extract the following three highly related narratives from these sentences: (a) Mexican immigrants bring problems; (b) Mexican immigrants bring drugs; (c) Mexican immigrants bring crime. These are narratives about how immigration will impact the United States. The speech contains more information, but not in the form of explicit

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causal statements, such as the claim that the immigrants from Mexico are not "their best" people, that "they're rapists", and that some may be "good people". Looking only at causal statements also misses the attempted flattery of Trump towards those present during his speech, when, by repeatedly saying that "they are not sending you" to the audience, he implies that those present are part of "the best" which Mexico is explicitly "not sending".

The speech above is meant neither to be necessarily representative nor particularly important. Its purpose is simply to show that any policy narrative can be summarised through these constituent parts, given our definition of narratives as subjective causal models. It also shows that information does get lost in this process: the representation abstracts away from who the narrator is, what the emotional appeal of the story around the narrative is, or who the protagonists in these stories are. These details matter both in terms of how persuasive the narrative is and what it is meant to achieve. Yet, the minimal representation helps us make sense of how to think about collecting data about narratives, and how to track the evolution of narratives over time as well as differences across political actors.

There are, in principle, many useful sources for political scapegoating narratives. For instance, large scale surveys, such as the World Values Survey or the European Social Survey, have for decades routinely ask people what they believe in.

More recently, digitisation efforts have made accessible a vast amount of parliamentary speeches across countries. For instance, Gentzkow et al. (2019) provide and analyse a dataset of speeches made in the US Congress from 1873 to 2016. Odell (2019) provides a similar dataset for the UK House of Commons, spanning 1979-2021. Rauh and Schwalbach (2020) provide speeches in parliaments across nine democracies. There is now a growing literature that makes use of these datasets, for instance analysing speeches on the topic of immigration (Magnusson et al., 2018; Tzelgov and Olander, 2018).

Political scapegoating narratives are highly informative, as shown by the framework of the previous section. Demand for scapegoating narratives are contingent on the grievances that people face, and on how these correlate with economic and

sociocultural factors. Investigating which parties offer scapegoating narratives therefore gives insights about the differing situations of voters that back different parties parties, and about the larger politico-economic situation of the country.

Before proceeding to an application using parliamentary data, I will outline how we can extract information about narratives from parliamentary speeches. Our formalisation of the concept of narratives is hereby informative, as it gives us an understanding of what different methodologies can capture, and what they are missing. To make sense of political speeches, one inevitably needs to reduce the dimensionality, to go from text corpora of millions of speeches to a simple output that captures something meaningful relating to narratives. In the below, I will give just a snapshot of available approaches, as a full account is beyond the scope of this paper; a much more detailed treatment can be found in Ash and Hansen (2023).

Dictionary-based approaches. A simple starting point is to think of text in the "bag-of-words" representation (see Ash and Hansen, 2023, p. 662): this assumes that the relevant information of a speech can be simply represented by the frequency of relevant terms used. Researchers can then specify a "dictionary" of terms, which are meant to capture narrative components relevant to the topics under study. The same principle can be used for bigrams, where pairs of terms are the unit of analysis, or n-grams more generally.

Of course, this approach loses a lot of relevant information, including the sentence structure or the context of the speech. It may also be misleading, as certain keywords may capture debates that are entirely unrelated to the topic under study (e.g., the keyword "migration" will also capture debates about migration from one IT system to another). However, looking back at our definition of narratives as subject-verb-object triplets, we find that there is still relevant information contained in dictionary-based approaches. For instance, the count of times in which parties use narratives about immigrants will be related to the number of times that "immigrant", or related terms, is used as either a subject or an object in a speech. Hence, word counts may be a useful indicator of the frequency at which narratives on specific topics appear.

Frequency is one thing; sentiment of the narrative is another. To understand if

a narrative exhibits a positive or negative connotation towards the entities under study, one would ideally wish to capture the tone of the narrative. One way to imperfectly do this is to conduct sentiment analysis, by defining a set of terms that is positive, and a set that is negative, in the context of study. The co-occurrence of the "immigrant" with "illegal", for instance, may be an indicator that a narrative is more on the negative side towards immigration. Such very simple approaches can be useful to get a first glance of the data—as I will show in the application of the next section. However, this is an imperfect solution, as much of the context and causal structure of the narrative is lost.

Identifying causal structures. A remedy to this issue can be found in approaches that keep the causal structure of narratives intact, and therefore conserve more information about the underlying narratives. A recent innovation in this approach is embodied in the RELATIO tool of Ash et al. (2024). This approach combines supervised and unsupervised machine learning methods to translate text into a statement of narratives in the "subject, verb, object" format. It is useful as a dimension reduction tool: from a set of texts, it can produce the set and count of "subject, verb, object" triplets that represent the text.

RELATIO proceeds in two steps. In a first step, it labels the semantic roles of each (set of) words in a sentence, classifying them into subjects, verbs, objects, and other semantic roles (such as verb negations). In a second step, it uses established unsupervised machine learning tools to group together subjects and objects that are used in a similar way in a text corpus. The output is a set of narratives where similar words have been transposed into the same, in order to reduce the dimensionality of narratives in the data.

A limitation of this approach is that it cannot capture the context of a "subject, verb, object" triplet. In particular, it will fail to distinguish earnest from critical uses of the narrative. In the political sphere, this is particularly important, as political agents may repeat a narrative before trying to discredit it. In the data produced by RELATIO, a critical use of the narrative will appear in the same way as an earnest use – although, perhaps, the critical one will be accompanied by an

opposing narrative.

Manual labelling of speeches and the use of AI tools. A way to keep both the causal structure of narratives in tact as well as preserve some of the context in which the narrative is used is to manually label political speeches. Until very recently, there were two serious issues with that. First, this task is very time consuming. A partial remedy is that one can label a smaller set and train an algorithm on it (more on that below), but it is still a lengthy and costly enterprise. Second, it is a highly subjective task in many contexts, as some speeches may for instance imply a certain sentiment without explicitly stating it. There will be differences between people as to how they rate speeches, and there may even be "within-person" inconsistencies, as the same researcher may rate a speech differently when looking at it repeatedly.

The advent of large-language models (LLMs), such as GPT-4, has changed the situation by making it vastly faster and less expensive to label speeches. Arguably, LLMs have also have more consistency "within", although the underlying models do change, and output will depend on some non-determinstic factors. With all these limitations in mind, LLMs have still made it at least in principle feasible to extract much more information about the causal structure of the narrative that also takes its context of use into consideration.

Mixed approaches. There are many ways to combine the approaches discussed above. One way is to manually classify a training set of speeches and then use algorithms, such as the Naive Bayes Classifier, to label the remaining datasets. Another is to use the RELATIO tool in order to convert a dataset of speeches into one of narratives, and then label the narratives as being positive or negative on a given topic of interest. Here, LLMs have openend up a vast amount of new possibilities to combine algorithmic tools with tasks that used to be very time consuming, but are now next to immediate, at least relative to the time it used to take before. We are currently at early stages of exploring how to best combine these approaches.

5 Anti-immigrant scapegoating narratives in parliamentary speeches: an application

The previous section gave an overview of how to think about narratives as they appear in speeches, and discussed several methodologies to extract them from textual data. In this section, I will give a very simple application by using dictionary-based methods to represent differences in political narratives. In particular, I focus on anti-immigrant scapegoating narratives in the US Congress and the UK House of Commons. I follow a body of existing work that looks at parliamentary speeches to identify sentiments towards migration (see, for instance, Magnusson et al., 2018; Tzelgov and Olander, 2018).

In terms of the methodology, I use the simplest one possible: a dictionary to look at the count of terms, and pairs of terms, that are related to narratives towards immigrants. The methodology was chosen to show how easy it is to treat speeches as textual data and to extract some meaningful information about differences in narratives, even with very limited tools. The results, however, should be seen as indicative at best, and no broad generalisations follow. As described in the previous section, much better tools exist to infer more from the data; I am in the process of applying these tools in related current work-in-progress.

In terms of data, I build on the US Congress dataset from Gentzkow et al. (2019) for data covering 1959-2016.[12]. This can be extended to cover more recent time periods by using Card et al. (2022).[13] For the UK, I use the dataset by Odell (2019). My data covers all speeches in the US House of Congress from 1960-2020, and all speeches in the United Kingdom between 1979-2021. Overall, this amounts to over 10 million speeches. Without a reduction in the dimensionality, this data is inscrutable.

To make sense of the data in the simplest possible way, I proceed in two steps. First, I use a dictionary of words that is meant to capture the frequency with

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[12]The data is accesssible at `https://data.stanford.edu/congress_text`.

[13]See `https://github.com/dallascard/us-immigration-speeches/`; with thanks to Jake Fazzio for helping prepare the data.

Figure 2: Frequency of "immigrant" and related terms per speech

(a) United States

(b) United Kingdom
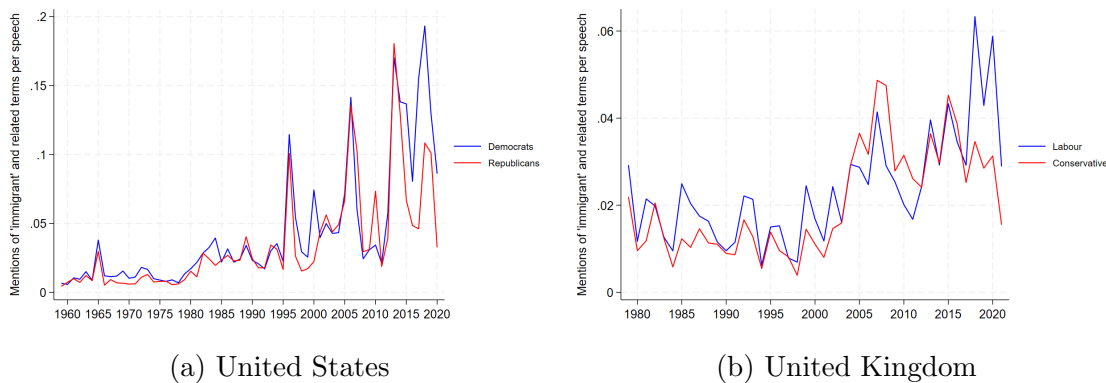
which narratives on the topic of migration appear. Second, I will use bigrams to identify narratives that are more likely to capture negative sentiment towards migrants. In each case, I compare Republican and Democrat politicians in the US, and Conservative and Labour politicians in the UK.

Figure 2 gives a first indication of the frequency at which "immigration" and related terms appear in speeches.[14] It shows the average count per year across the two leading parties of each country. The data shows very clearly that the mention of immigration has increased manifold over the last decades. It also shows a difference in scale across the two countries: while the frequency has recently been around 0.04 in the UK (the term appears once every 25 speeches), it is around 0.1 in the US (it appears once every 10 speeches). It is also noteworthy that in terms of the raw count, left-wing and right-wing parties strongly correlate, although in recent years perhaps left-wing parties mention it more than right-wing parties.

The latter divergence is more clearly visible in the term term "refugee", shown in Figure 3. Left-wing parties in the two countries in recent years have used this term at roughly twice the frequency compared to right-wing parties. This is intuitive, insofar as the term "refugee" is associated with humanitarian needs more so than "immigrant" (see, for instance UNHCR, 2016). Compared to the previous figure, the difference in scale across the two countries becomes much smaller. The peak in 2015, corresponding to a peak inflow from Syrian refugees, is also noteworthy.

[14]In particular, I compute the number of times in which the terms "migrant" and "migration" appear in a speech. The methodology also captures longer words built on these, such as "immigrant" or "immigration".
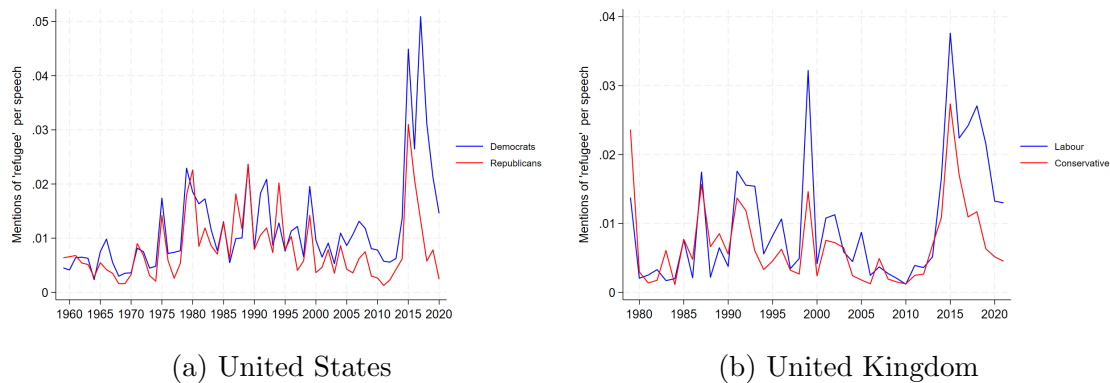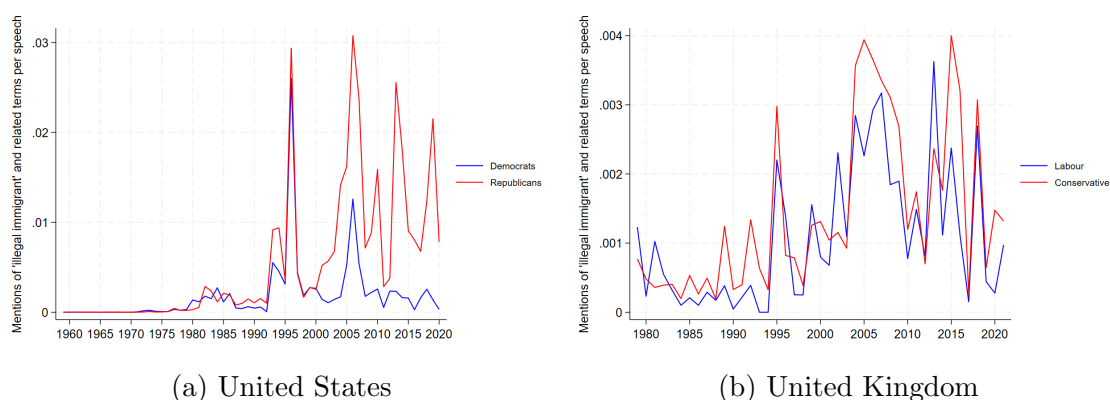
Figure 3: Frequency of "refugee" per speech

(a) United States

(b) United Kingdom

Figure 4: Frequency of "illegal immigrant" and related terms per speech

(a) United States

(b) United Kingdom

Now, turning to the second step of the analysis, we would like to find a measure that more specifically captures scapegoating against immigrants. For this purpose, Figure 4 plots the frequency of "illegal immigrant" and related terms.[15]. The results in this case are starkly different across the US and the UK. In the latter country, talk of illegal immigration is very limited, and very similar across parties. The picture is very different for the US. Since 2001, there is a large difference between the count of terms related to illegal immigration in speeches between Republicans and Democrats. Moreover, there are large cross-country differences: For Republicans, the frequency is an order of magnitude higher compared to either party in the UK. More research is to be done on what caused the divergence in usage across Republicans and Democrats in the first place. However, it is notable that the divergence started in the year of the September 11 attacks; recent research suggests that narratives on the "war on terror" diverged exactly then, too (Ash et al., 2024).

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[15]In particular, I count the appearance of the bigram "illegal immig", "illegal mig" and "illegal refu".

Overall, the evidence of this simple empirical exercise is consistent with the idea that scapegoating narratives have been leveraged by the Republican party to meet the demand for scapegoats from those who feel "left behind". This accords both with the framework discussed in Section 3, as well as with literature from the social sciences on the topic (Abrajano and Hajnal, 2015; Gest, 2016; Wuthnow, 2018; Norris and Inglehart, 2019; Hochschild, 2016). However, this conclusion should not be stretched. Firstly, the methods employed here are too simple to draw any serious conclusions. Secondly, other dimensions of scapegoating have to be explored to support this claim. Nevertheless, the exercise shows that, with very simple means, one can transform vast amounts of speech data into easily interpretable entities that are still informative about the underlying narratives.

6 Concluding remarks

This paper provided an overview of scapegoating narratives in political economy. Based on a reading of the interdisciplinary literature, I gave a definition of the elusive concept of narratives. I argued that scapegoating narratives are important in the context of politics, where they have shaped, and continue to shape, the world. I provided a simplified account of how to think formally about political competition in scapegoating narratives, and how to measure them in political speeches. Finally, I offered an application of the concepts to parliamentary speeches in the US and UK, hopefully convincing the reader that even simple ways to capture narratives can be informative. Much remains to be explored, in both theoretical and empirical work. On the latter, the advent of large language models has placed within reach what has been impossible only a few years ago.

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