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Sydnee Wilke

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## Editorial Forward

Sam Lundry

Sydnee Wilke

Dear Reader,

We are pleased to present the Spring 2019 edition of the Journal of Politics and International Affairs at The Ohio State University. This issue of the Journal features five papers from five excellent young scholars. These papers were chosen out of hundreds of excellent submissions from around the world. We are confident in their quality and in their contributions to the academic literature of international relations, public policy, political theory, and American politics.

Our Journal, revived in 2011 by a group of Ohio State undergraduate students, has continued to flourish thanks to the efforts of our editorial staff and officers. This Journal is the result of hundreds of hours of work by members of JPIA, and we are exceptionally proud of the dedication and passion they have shown during the publication process. We are also grateful and proud of those who have submitted their work to the Journal, as each of these students is contributing meaningfully to their respective field.

This Journal, like all those before it, would not be possible without the help and support of the Department of Political Science. We would like to especially thank Dr. Jennifer Mitzen, JPIA's faculty advisor. Dr. Mitzen's experience, advice, and wisdom was invaluable. We would also like to thank Ms. Jessica Valsi, without whom this physical copy you're reading would not exist. In addition, we'd like to thank the faculty and staff of the Department for their support of JPIA and of all undergraduate researchers.

Finally, we'd like to thank you, the reader, for your interest in our Journal. We hope that its contents will introduce you to new perspectives and profound ideas; we hope that you find interest in these pages and that our work is meaningful to the development of a broader community of rigorous undergraduate research in the social sciences.

Sam Lundry and Sydnee Wilke

Editors in Chief



# The Implications of Chinese Foreign Policy for Suicide Terrorism

Jakob Urda

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This article examines China's foreign policy and its potential for spawning transnational terrorist backlash. Specifically, the paper applies Robert Pape's seminal framework for the conditions which inspire suicide terrorism. Through massive infrastructure investments, financial deals with developing economies, and the establishment of an overseas military presence, Beijing has expanded its role on the world scene. China has not yet had to deal with long-term foreign wars or major international entanglements. Yet, prior world leaders have often encountered backlash and resentment as their world-building projects came into conflict with local interests. This article concludes that Chinese foreign policy fulfills or nearly fulfills the necessary conditions for triggering a retaliatory suicide terror campaign.

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**T**his article examines the People's Republic of China's (PRC) foreign policy in the context of suicide terrorism literature, specifically Robert Pape's framework for the conflicts likely to produce suicide campaigns (Pape, 2006). China's rapid economic growth over the last three decades has allowed the it to adopt an expansive foreign policy of developmental investment and military expansion (Sutter, 2012). Not all forms of foreign policies breed suicide terrorist retaliation, but Beijing's adventurism has shown the potential to generate considerable military backlash. Robert Pape's framework analyzes when the conditions of a specific foreign policy are sufficient for backlash to manifest as suicide terrorism. The paper concludes that Chinese foreign policy fulfills Pape's criteria for generating a suicide terrorist campaign.

News media and security scholarship traditionally assume that Western democratic nations are the principal targets of terrorism (Pedahzur, 2005). The War on Terror spawned two major American interventions in Iraq and Afghanistan, which reinforced the idea that Western nations are the only opponents of terror groups like Al-Qaeda. The narrow focus on these

contemporary insurgencies in the Middle East biases the present against the past and the future — creating frameworks which are nominally difficult to apply in non-Western cases. However, when analyzing the necessary conditions for terrorism in a Sino-centric context, a close reading of scholarship suggests that China shares the fundamental characteristics which make suicide terror an appealing tactic for militants.

### **Why Suicide Terrorism?**

Terrorists fight for the resolution of specific political grievances—foreign occupation, corrupt regimes, and the death of family members (Powell, 2015). Even those who fight for broader ideological struggles couch their decisions within the realities of the existing political landscape. For instance, Marxist-Leninist militants in India do not wage war against the United States, the world’s capitalist powerhouse, but against New Delhi. This is because people are most often concerned with specific and tangible problems which are present in the society they live in (the price of food, jobs, and specific instances of disrespect). The US is simply less important a threat to the average Indian Communist than the local authorities are. Anti-American terrorism is similarly stoked by specific political grievances: Osama Bin Laden justified his jihad as retaliation for American presence in Saudi Arabia and the greater Middle East (Woolf, 2008). In a recent conference in Moscow, Taliban spokespeople argued that their insurgency was motivated by a desire to expel American occupiers and their “corrupt puppet regime” in Kabul (Stanikzai, 2018). Political grievances, if severe enough, cause locals to fight back against perceived injustice in the form of violent terrorism. Therefore, countries which generate more grievances abroad are liable to experience an increase in terrorist backlash.

Suicide terrorism is a particularly important subset of research on terrorism. Seven of the ten most deadly current ongoing terrorist conflicts — Syria, Afghanistan, Nigeria, Libya, Somalia, Pakistan, and Egypt — involve active suicide campaigns (START, 2018). While suicide terrorism accounts for



only four percent of all terrorism, it comprises 48 percent of terrorism related fatalities (Pape, 2006). Suicide bombings kill an average of 11 people per attack, compared to three for conventional terrorism (START, 2016). The five-year period following 2003 saw a nearly 500 percent increase in the amount of suicide terrorism compared to the two decades prior to it (Pape and Feldman, 2010). It was the suicide terrorist attacks of 9/11 which provoked the decades long American War on Terror, which has dictated American foreign policy ever since. At the same time, suicide bombers have been recruited from across the ideological, religious, and economic spectrum, defying easy explanations and solutions. Many suicide bombers are well-educated and middle-class, challenging theories of insurgency as motivated by material deprivation (Pape et al, 2016). Suicide terrorism is both a significant challenge for the world's national security community and a public policy problem for those looking to address its root causes.

Understanding suicide terrorism is important for studying Chinese foreign policy strategy. Terrorists face constant tradeoffs. The use of any tactic – in particular suicide terror – is tied to a range of factors which advantage the implementation of terrorism against other tactics (Shapiro, 2013). Martyrdom is not the first choice of most insurgents because it guarantees that the individual dies in the process. In other circumstances, groups might opt for nonviolent resistance, conventional civil war, or political assassinations. Certainly, not all political grievances are met with the response of suicide terrorism. Therefore, analyzing Chinese investment in the context of suicide terrorism sheds light on the strengths and weaknesses of Beijing's strategy abroad.

Pape's framework is seminal in the study of suicide terrorism. The work draws from a database which catalogs every suicide attack publicly on record, both in print and online. *Dying to Win* and its associated publications are foundational to the modern understanding of suicide terrorism, with over 3,000 scholarly citations. Pape's framework argues that over 90 percent of suicide attacks on record are part of large campaigns designed to coerce democracies into withdrawing from occupations. In *Dying to Win*, Pape outlines

the conditions necessary for the inception of a suicide terror campaign. Pape highlights four key characteristics: (1) political struggles over the occupation of one territory by another country, (2) a background of religious differences, (3) the occupying nation being democratic, (4) and the conflict having a legacy of prior conventional-style attacks (Pape, 2006).

The current situation in China does not perfectly match Pape's entire framework — occupation and democracy being the most ill-adapted. However, these problems are mostly indicative of the historical focus of terrorism research with the Middle East and Western countries. The underlying logic, when examined within the specific context of China and the parties with which it produces grievances, strongly suggests that Beijing will see the rise of a suicide terrorism campaign. This paper will work through the causal processes of Pape's four criteria and argue that China fits the bill.

### **Provoking Backlash**

Pape's first criterion for suicide terrorism is foreign occupation. Beijing is embarking upon ambitious, invasive foreign policy projects which create a dense network of interests that demand Chinese intervention. The "One Belt, One Road" (OBOR) initiative hopes to spread several trillion dollars in infrastructure spending to create economic linkages between China and the rest of the world (Wei, et al., 2016). Specifically, China seeks to use OBOR to entrench its economic competitiveness and sustain its industrial and technological growth. OBOR is meant to tie developing economies to an emerging Chinese export sector by feeding China cheap raw materials and giving Chinese manufacturing an advantage in the marketplace (McKinsey, 2018). In order to support these investments, Beijing has contracted out hundreds of infrastructure deals, made trade agreements with countries around the world, and begun to expand its international footprint in a manner not seen since the United States embarked upon the Marshall Plan at the end of the Second World War (Perlez and Huang, 2017)

To support OBOR, China has grown closer and closer to unpopular,

illiberal politicians across South Asia and East Africa (Lanteigne, 2015). For instance, Pakistan is the site of a 62-billion-dollar OBOR investment in energy production, infrastructure, and industrial development called the “China-Pakistan Economic Corridor” (CPEC). The Chinese government has spent vast sums of money to buy the influence of senior members of the Pakistani military establishment (Chaudhry, 2017). When Pakistani Prime Minister Imran Khan signaled resistance towards several unpopular Chinese investment projects, Beijing conducted a series of high-profile meetings with Pakistani military elites. When the meetings concluded, top generals quickly convinced Khan to move forward with the CPEC projects (Habib, 2018). Similarly, in Sri Lanka, China relied on their ally, President Mahinda Rajapaksa to finance the Hambantota port project. Beijing used their leverage to cut a deal which put Sri Lanka in unmanageable amounts of debt, eventually resulting in the Sri Lankan government granting Beijing a 99-year lease on the property in exchange for repayment assistance (Ibid).

Some might argue that resentment towards China for OBOR policies does not clear the threshold necessary to provoke terrorist retaliation. Specifically, they might claim that OBOR does not constitute ‘foreign occupation’ – Pape’s stated criteria – akin to Western-style invasion and nation building projects. However, Chinese expansionism produces the same essential charges as formal occupation. Territorial occupation does not intrinsically cause retaliatory terrorism; it produces the political ill will and hostility which eventually manifest themselves in a local willingness for martyrdom. This is because, as Pape writes, “The critical requirement is that the occupying power’s political control must depend on employing coercive assets [in this case economic and political influence]. The number of troops actually stationed in the occupied territory may... not be large.” (Pape, 2006, 67) On the surface, Beijing’s footprint in many of its target countries ranges upwards of tens of billions of dollars, far larger than the cost of most occupations throughout history. China’s foreign policy instantiates grievances in three ways: through forging ties with unpopular local regimes, demographically dislocating local minorities, and the

militarization of investment targets.

Chinese investment and Beijing's political allies have provoked widespread ill will. In particular, Chinese reliance on often corrupt local elites has created political resentment. In the Maldives for instance, strongman prime minister Abdulla Yameen was recently ousted for his close ties to Beijing. Yameen had taken billions of dollars of OBOR loans, which were widely seen as fueling government corruption. In Kenya, Uganda, and Zambia, Chinese OBOR funds have been tied to major government corruption scandals. The recipients of the largest OBOR loans are almost universally in the bottom half of Transparency International's Corruption Perceptions Index, which implicates Beijing in local economic mismanagement. Most tellingly, voters in the Maldives worry that the Chinese investment would "leave the country effectively under the control of Beijing." (Balding, 2018). For many nations, Chinese funding is so large that it presents the legitimate concern that China could be directing domestic policy. Economic discontent is not localized or small scale – Ethiopia's debt to China totals nearly a third of its GDP, and over a dozen African nations have been assessed as being at risk of being unable to repay Chinese loans (ISS, 2018).

The concern with occupation is, at its heart, a fear that one's country is no longer their own. Whether it be through the barrel of a gun or coercive economic policy, the impact is the same: the loss of sovereignty. Pape agrees with this when he writes that "Although Saudi Arabia was not under American military occupation per se, one major objective of Al-Qaeda is the expulsion of US troops from the Persian Gulf region." (Pape, 2006) At no point was the United States dictating Saudi domestic policy or seriously reshaping the country's ability to craft legislation. The issue was the fear that America would be in a position to exercise coercive force of Riyadh. Similarly, China's 1.3-billion-dollar loan package to the Maldives, a country whose total GDP is under 5 billion, arguably gives Beijing as much leverage as more formal methods of occupation. In Pakistan, a leaked Chinese white paper confirmed Beijing's intentions of dramatically reshaping Pakistani domestic policy by

calling for “thousands of acres of agricultural land [to be] leased out to Chinese enterprises” and “a full system of monitoring and surveillance” from Peshawar to Karachi (Hussain, 2017). Locals understandably fear that their governments will be captured by Chinese influence.

Ethnic displacement which accompanies OBOR investment triggers resentment similar to Pape’s criterion of foreign occupation (Anderson, 2006). In many OBOR target sites there is massive discontent over the influx of Han Chinese workers who reap the economic benefits of CPEC infrastructure and push out local industry. In Pakistan, for instance, locals fear that given the current rate of influx of Chinese nationals into Balochistan the native population of the area may be outnumbered by 2048 (Pauley and Shah, 2018). Across Africa, an estimated million Chinese migrants compete with locals for jobs and political power (Economist, 2013). The influx of millions of Han migrants stokes ethnic tensions, because local minority communities fear losing political influence to thousands of new and powerful Chinese nationals who enter the scene (Notezai, 2019). In East Africa, local laborers hired by Chinese investors have launched roiling protests over low wages and ill treatment. A group of Kenyans stormed a Chinese labor site in April injuring twelve Chinese with knives and clubs. Their stated motivation was that the Chinese investment was exploitative and that most of the jobs that were created went to Chinese migrants (Kuo, 2019).

Ethnic displacement triggers the same core grievances as foreign occupation: loss of political control (Anderson, 2006). China’s leaked white paper on Pakistan suggests crafting new rules which give preferential treatment to Chinese citizens, businesses, and tourists over Pakistani nationals. In a more direct sense, the existence of large local Chinese populations acts as a heavy-handed visible presence of foreign influence in domestic politics similar to that which occupying troops might have (Small, 2015). In places like Balochistan, large Chinese migrant populations could mean the permanent loss of political influence, because Han migrants would answer to Beijing, not local authorities. Local ethnic groups fear becoming second-class citizens in their own homes.

Finally, Chinese militarization of OBOR investment areas closely resembles old-school territorial occupation liable to generate terrorist backlash. Pakistan has had to raise over 20 thousand special combat troops to protect various Chinese investments. OBOR projects are also protected by thousands of quasi-state-affiliated private military contractors who send Chinese soldiers abroad to fight instability in economic development zones (Watts, 2019). These firms operate from Turkey, to Mozambique, to Thailand with the intention of expanding to cover over 50 countries. Beijing has also made clear its intent to more actively pursue foreign military deployment, as “A combination of resurgent nationalism, Beijing’s view that all ethnic Chinese are ‘sons of the Yellow Emperor’ who owe a degree of loyalty to the motherland regardless of their actual nationality and the country’s growing military means to intervene across the globe appears to offer previously absent leverage and protection to the *haiwài huárén*, or overseas Chinese, regardless if they want it nor not.” (Global Risk, 2017)

Militarization creates the opportunity to dramatically inflame tensions with locals, who may come to see OBOR less as economic development and more as territorial occupation or, as some Balochi militants have described it, “neo-colonialism” (Su, 2018). Chinese paramilitary outfits have intervened in the evacuation of Chinese contractors, hostage standoffs, and have even taken part in conflicts between local tribes and militant groups who threaten to disrupt Chinese projects. Overall, the Stiftung Mercator Foundation (2018) concludes that the wide scale deployment and general lack of accountability for these military contractors creates a “high potential for mistakes that could create political backlash for Beijing.”

As China continues to grow and OBOR investments continue to roll out, Beijing will become more involved in the active foreign intervention. This is because developing infrastructure abroad will force China to accumulate more and more international commitments. More infrastructure and development projects mean more investments which need protection. OBOR has expanded from the initial vision of creating a few trade routes to include investments in

Latin America and a trans-arctic economic passage, and projected Chinese infrastructure spending grows every year. The trend of deepening Chinese involvement is clearly visible; last year, Chinese Defense Minister Wei Fenghe announced that China was “ready to provide security guarantees for the One Belt, One Road projects.” If Beijing wants to realize its ultimate goals of global Sino-centric trade, it will have to commit vast amounts of time and treasure to see it through.

### **The Perfect Target**

Pape argues that suicide terrorists primarily target democracies. This is because political grievances are necessary but insufficient to cause retaliatory terrorism; terrorists must also believe that their actions will cause a withdrawal of the offending policies. If discontents believe that no amount of pressure will sway an occupying arm to leave, then why bother with resistance? The perceived weakness or low-cost tolerance of democratic regimes leads the insurgents to conclude that a few high casualty attacks can tip the balance of public opinion against democratic leaders and induce withdrawal.

The logic of exploiting the perceived low-cost tolerance of democratic regimes makes sense. Terrorists, like any other actor, face a variety of tradeoffs. A low-cost tolerance on the part of occupying regimes makes terrorism more lucrative by increasing the probability of success. Democracies are responsible to voters who are less willing than dictators or aristocrats to bear heavy casualties or sustain unwinnable overseas wars. Suicide terrorism exploits “the rationality of irrationality,” in which the seeming irrational and extreme martyrdom of suicide terrorists conveys credibility to a democratic audience even more violent and undeterrable attacks will continue (Pape, 2003). The proof is evident: from 1980 until 2008 every major suicide terror campaign has been launched by a group seeking more political freedom from status quo authorities (CPOST Data, 2019).

While China is not a Western style democracy, there are reasons to believe the same logic of cost tolerance would apply to Beijing. First, Chinese

politicians are at least to some degree accountable to popular pressures. In a direct sense, every member of local government is elected by a popular vote, and all higher rungs of politics are elected through indirect elections by the group below it. As such, Chinese politicians, like those in democracies, have to worry about unpopular, high-cost foreign adventurism. For instance, after massive popular backlash, Xi Jinping rolled back a number of controversial education reforms in 2018 (SCMP, 2018). In terms of economic freedom, the Heritage Foundation (2018) ranks China *more* free than Sri Lanka and India (which have both experienced suicide campaigns). Economic freedom is often associated with cost tolerance because of it represents institutions which amplify the voice of the public in civil society. There is little reason to believe if China were involved in massive, unpopular foreign entanglements that its government would be seriously immune from popular pressure.

Second, more important than China's actual cost tolerance is its *perceived* cost tolerance. Terrorists are not social scientists who can use modeling to terse out the actual threshold of violence necessary to cause the withdrawal of the occupiers. If so, they would know that democracies like the United States have frequently tolerated immense costs for scant returns, such as the 17-year long Vietnam War. Indeed, there is little hard evidence to suggest that democracies are actually easier to coerce than authoritarian regimes (Horowitz and Reiter, 2001). Instead, terrorism requires the insurgent to *believe* that the occupier is responsive to violent coercion. Similarly, democracies are thought of as more restrained in their foreign policy. A successful suicide terrorism campaign requires that the occupier, not engage in the type of wholesale slaughter that would actually eradicate a terrorist group (Pape, 2003).

China is the type of actor which a terrorist group could realistically believe that a suicide terror campaign would coerce into withdrawal. Modern China has repeatedly demonstrated that while illiberal and authoritarian, it lacks the stomach for the same type of high visibility slaughter that has characterized historic authoritarian regimes. The Tiananmen Square massacre saw Beijing kill thousands of dissident protestors, but these numbers were nowhere near



the millions of casualties that brutal regimes like Stalinist Russia produced. In its border war with India, Chinese military missions were never characterized by the savagery of 20th century European fascism. Even with dissent in Hong Kong, an alternative political model within the Chinese state itself, Beijing sees fit to use the light touch of quiet censorship and incentives rather than brutal force. In its restive Muslim majority areas, Beijing is careful to enforce media blackouts and censorship in order to limit the amount of publicity generated by political repression.

The idea that China, a quasi-authoritarian regime, could be susceptible to suicide terrorism has a strong basis in history. When scholarship talks about the low cost tolerance of ‘democracies,’ they actually speak about a range of different regimes with varying levels of accountability to their people. The definition of democracy (that is to say, regimes which terrorists have thought might capitulate to suicide campaigns) has varied immensely. Pape’s original analysis of suicide terrorism grouped countries such as Turkey and Russia as democracies, even though their freedom house democracy scores rated them as only partially free (Pape, 2003). Certainly, both countries would be less accountable to their people, and would probably be perceived by terrorists as less ‘soft,’ than more Western democracies like the US and Britain. Even more significant is the modern suicide campaign of ISIS against Syria and Iraq. There is little case to be made that ISIS is primarily waging war against any democracy— ISIS targets Syrian and Iraqi forces far more than American ones (Syria is a total autocracy and Iraq is only partially free) (CPOST Data, 2019). Yet the logic holds because ISIS likely views the Syrian regime as frail, facing many enemies at once, and thus unable to tolerate the costs associated with a massive suicide campaign. They would seem to be correct: until American intervention around 2014, ISIS’s deployment of suicide tactics led to stunning battlefield victories against both Iraq and Syria.

Lastly, suicide campaigns against OBOR investments perform violence for *two* audiences: Beijing and the home regime. Terrorists struggle to see foreign withdrawal, and convincing home-governments to withdraw support for

Chinese investment projects would accomplish that goal. This is because even if Beijing is seen as a cost tolerant, impenetrable target to would-be terrorists, pressure can be applied towards ‘softer’ domestic democratic regimes. Attacks against Chinese investments would impose costs on both the home country and China, who must both reevaluate the benefits of partnering with Beijing amidst lethal opposition. After the attempted consular suicide bombing in Karachi, Andrew Small (2018) wrote that the “BLA is targeting Chinese interests in Pakistan, first, as a way to put pressure on China to withdraw from Balochistan *and*, second, to put pressure on the Pakistani government.” Even if China does not budge, home countries very well might. Pakistan, Sri Lanka, Kenya, and Uganda have all publicly discussed halting or reevaluating Chinese investment projects because of popular backlash (Balding, 2018).

### **Eager Recruits**

Pape argues that the third condition for suicide terrorism is a religious difference between the occupier and occupied states. This is because religious differences create the conditions for the mobilization of a suicide terror campaign. Killing oneself is not undertaken lightly, so suicide terror requires a particular set of socio-cultural institutions to generate enough recruits to make a difference. The taproot of successful suicide terrorist mobilization is nationalism — the set of ethnic, linguistic, and historical characteristics which give a people a sense of specialness (Pape, 2006). According to Pape (2003), “religious differences harden the boundaries between national communities and make it easier for terrorist leaders to portray the conflict in zero-sum terms, demonize the opponents, and gain legitimacy for martyrdom.” A suicide terror campaign against China would be able to successfully mobilize fighters for martyrdom. Chinese foreign policy targets nations with particularly strong national identities and occurs over a patchwork of religious differences.

The more different an occupying nationality is than its target people, the more aggressive the backlash. Occupiers with distinct cultures and national identities implicitly threaten the local community’s ability to self-determine

and express its own unique national culture. Stark differences between peoples reflect the possibility that coercive force will be employed to enforce one nation's worldview over another. This phenomenon explains why many occupations are tolerated and resistance is muted. For instance, parts of the Democratic Republic of the Congo seized by its neighbors during the Second Congo War did not rise up in opposition. This is likely because the Congo's borders were drawn arbitrarily, and the inhabitants felt no closer to their original government than that of the occupiers. By contrast, the Balkan Wars, where incredibly salient nationalities fought against what were perceived as existential threats, saw mass mobilization and tens of thousands of dead.

Religious differences make national divisions between occupiers and their subjects particularly salient. Pape's framework sees religions as exclusive, because most major faiths prohibit simultaneous membership in multiple doctrines, rigidly separating the aggrieved parties (Pape, 2006). By sharply dividing the occupier from the occupied, religious differences allow for the easy demonization of "the other." Religious practices that are alien to one's own seem strange at best, sacrilegious or damnable at worst. Because religions claim that their doctrine possesses superior insight into philosophical truth than others, extremists who tap into these divisions gain legitimacy for their calls to action. By claiming superior insight into truth, religion becomes an indivisible issue, where conflicts and grievances are irresolvable because they are part of fundamentally different worldviews — for instance, the irreconcilability of competing claims to holy sites in the middle east stems from both sides believing their religion gives them a 'truer' claim (Hassner, 2003). Religion allows extremists to use rhetoric which is highly effective at mobilizing fighters because it touches on what people perceive as core aspects of their identity and their relationship with the world around them.

There is little doubt that the differences between Chinese national identity and those of the countries it targets are significant and salient. The South Asian, Middle Eastern, and East African countries most directly affected by OBOR are overwhelmingly religious. Pakistan for instance is 96 percent

Muslim and has a national identity built around its faith. Every country that is the site of major Chinese investments in East Africa has a clear religious majority. By contrast, the Chinese government is atheist, militantly so. Not only do formal state institutions explicitly condemn organized religion, 75 percent of Chinese nationals do not practice as well. China has generated international headlines for its persecution of Christians and has historically prevented the Vatican from appointing Catholic bishops.

China's proven track record of persecuting Muslims makes the religious difference between them and many OBOR target nations incredibly sharp. Beijing keeps its Uyghur Muslim minority population under constant surveillance, has detained up to a million locals, and maintains a heavily militarized presence throughout the Uyghur homeland in Xinjiang province. Beijing has been accused of using its power to crack down on Islam as an element of Uyghur culture, by demolishing Islamic art and statues and heavily policing mosques. The process has been called "cultural eradication" and "Sinicization." China's policies towards Uyghars make their stance towards organized religion, especially Islam, abundantly clear.

Beijing's heavy-handed repression of Muslims creates a lightning rod for anti-Chinese mobilization. China's treatment of Muslims has garnered backlash from the international community. The Organization of Islamic States, a consortium of 57 Muslim countries, has recently voiced concern over China's treatment of Muslims (Ma, 2018). Even more significantly, Malaysia and Pakistan, two countries with deep economic ties to the OBOR projects, have openly denounced several aspects of Beijing's policies towards Muslims. China's explicitly clear stance on Muslim persecution makes Beijing's influence over their targets a potentially dangerous affair.

The treatment of Chinese Uighurs is beginning to generate backlash from existing Islamic terrorist networks, particularly in Central Asia and East Africa. Al-Qaeda has called the Uyghar homeland of Xinjiang an "indivisible part of Islamic lands," and has asserted that it is the "duty of Muslims today to stand by the side of their wounded and wronged brothers in [Xianjiang]" (Yahya

al-Libi, 2009). Al-Qaeda has shown the desire to expand the theater of jihadi conflict by tapping into local Muslim grievances — co-opting malcontents in the Philippines, Kashmir, and Chechnya, for example. Similarly, ISIS has made clear that it views China's Uyghar policy as a *casus belli*, claiming that "East Turkestan is not an internal [Chinese] issue but rather a pure Islamic state that fell to the atheist Chinese occupation." (Acharya et al., 2010)

The religious differences between China and the Muslim countries it deals with create a strong pretext for unified resistance. Al-Qaeda has already forged links with terrorist groups such as the Turkestan Independence Party (TIP) who engage in anti-China violence. The TIP has benefited immensely from the rising attention garnered by China's anti-Muslim behavior. Namely, it has participated in joint training and combat missions with the Taliban and Al-Qaeda, and used the support of tribal leaders in Pakistan to set up bases for recruiting new fighters (Ramachandran, 2018). Beijing's active atheism and highly-visible anti-Muslim foreign policy will only continue to align terrorist resistance against it.

### **The Option of Last Resort**

Suicide terror most often happens when other methods of dispute resolution break down. This is because suicide terror campaigns are not undertaken lightly. Between the individually high cost of taking one's own life and the social taboos against suicide, especially in the Muslim faith, groups need to be convinced that martyrdom is necessary to realize their political objectives (Pape, 2006).

China's foreign policy is already breeding resentment that is not being addressed by moderate tactics. For instance, Sri Lanka has been roiled by popular discontent over Chinese investment and has seen repeated political turnover in the last year. Nevertheless, Beijing has still managed to seize Sri Lanka's strategic port at Hambantota as a concession for debt repayment assistance, and is generally understood to retain significant political influence over the current Prime Minister. Across East Africa, dissidents have registered

their disapproval with Beijing through conventional protests and occasional acts of terror, to little effect.

As countries exhaust alternative methods of redress, terrorism against Beijing becomes more and more likely. Nowhere can this better be seen than in Pakistan. In the 2018 elections, the insurgent antiestablishment candidate Imran Khan won, largely based on his skepticism of OBOR investment packages. Khan talked about freezing Chinese investment, and at the least pausing OBOR deals until they had been re-evaluated. However, the Pakistani military establishment quickly convinced Khan to renege on that campaign promise. Khan's supporters, who hoped to undo the influence that China had gained in their country, were outraged. The peaceful attempt at using democracy to address their political grievances had failed. A month after Imran Khan's election, the Baloch Liberation Front (BLF) addressed a letter to the Chinese ambassador to Pakistan, stating that Chinese nationals were legitimate targets for attacks, and followed the letter up with a suicide bombing of a bus carrying Chinese workers (Mahmood, 2019). In September, the Pakistani Taliban released an updated code of conduct for its fighters, claiming that "all non-Islamic countries allied with Pakistan" are viable targets, a clear thrust towards Beijing. (CTC, 2018)

China has the strength needed to prevent most forms of a local insurgency from being successful. For the first time in its history, China will soon be in a position to engage in multi-theater counterterrorism operations and exert coercive influence to suppress local resistance. China recently inaugurated its first naval base abroad, in Djibouti. Tellingly, one of the Djibouti base's main objectives according to the Chinese Naval command is "counterterrorism." (Headley, 2018). The People's Liberation Army has dedicated increasing resources to capabilities which allow them to project power abroad, through the development of new aircraft carriers and cruise missiles. China has thus far successfully stopped unrest in Pakistan, East Africa, and its own restive Xinjiang from seriously destabilizing its investments.

Increased resistance is a natural reaction from communities that feel

threatened by Chinese policies that they feel unable to stop. Pape writes that suicide terrorism “commonly arises from broad-based national liberation movements” which are unable to solve their grievances through conventional resistance (Pape, 2006). In Southeast Asia, a major target for OBOR investments, the Chinese diaspora is over 50 million. Such large populations have already hardened ethnic tensions and fueled anti-Chinese protests that have rocked Hanoi and Jakarta over the last year. In Kazakhstan, another OBOR target, the proportion of people who “hate” Chinese migrants has grown from 13 percent to 46 percent in the last decade (Choudhury, 2018). This hatred has the effect of unifying people in shared resistance, and “such an attitude has spread throughout Central Asia, and has expanded to different religions and different ethnic groups.” (Ibid) The threat of Chinese displacement has forced local communities to rally around their local national identity, creating the long-term pretext for Pape’s “broad-based” collective resistance.

Finally, there is substantial evidence to suggest that modern terrorists no longer require a legacy of stymied conventional conflict in order to initiate suicide campaigns. This is because terror networks have already learned and internalized suicide terrorism as a part of organizational doctrine, diminishing the need to relearn the practice. The campaigns studied by Pape developed suicide bombing as a tactic over many years, and had to overcome community taboos and individual resistance to martyrdom in order to roll-out the practice. However, contemporary suicide campaigns against China will require much less of a learning curve, because (1) many of the organizations are the same as those who have used suicide campaigns against the west, and (2) information sharing between terror networks has allowed for the faster and more effective dissemination of suicide attacks as a tactic.

First, the organizations which oppose Beijing’s foreign policy designs already use suicide bombing against domestic or western targets. In Pakistan, the Balochistan rebels extensively deployed of suicide bombing in their decades long conflict with the central government in Islamabad. In East Africa, terrorist

groups like Al-Shabaab have made ample use of suicide bombing as a tactic against Western interference. It seems unlikely that these groups would have to relearn suicide bombing as a tactic against Chinese intervention. Pape's logic supports this idea; the existence of prior non-suicide conflict is just a proxy variable for the erosion of group norms against suicide. In groups which have already adopted suicide bombing, those norms no longer exist. Thus, suicide terrorism as retaliation to Chinese foreign policy can occur without the historically necessary condition of a failed conventional struggle.

Second, cross-group learning about the effectiveness of suicide attacks makes organizations more willing to adopt martyrdom tactics. Because suicide terrorism has generally been effective at coercion occupiers to surrender concessions, terrorist groups may become more willing to readily employ the tactic and may encounter less resistance while doing so. In Pape's research, it took the Sikh and Kashmiri suicide terrorists' years (arguably decades) of failed conventional conflict with India before adopting suicide terrorism as a tactic (Pape, 2006). By contrast, the Afghan Taliban adopted large scale suicide terrorism after only four years of fighting the United States. The Taliban were able to override social stigma over suicide because they saw the demonstrated successes of martyrdom campaigns abroad (Williams, 2007). Iraqi terrorists picked up the tactic in even less time, less than two years after the initial American invasion. The normalization and successes of suicide terrorism will likely make it even easier for groups in the future to make use of the tactic.

One major factor in cross-group learning has been the rise of ISIS. During its rise, ISIS launched more suicide attacks than any other group in the world. The effects were astounding, ISIS crippled the armed forces of the Iraqis, the Syrians, and the Kurds for years and stole thousands of miles of land. This victory was built off of a massive suicide campaign, which launched as many attacks as the rest of the world combined. 65 percent of all recorded ISIS attacks were suicide attacks (START, 2016). ISIS also trained terrorist fighters from around the world, who have gone back to their homelands and spread ISIS-tactics to their home terrorist networks. While concrete data is lacking,



it is easy to see terrorist organizations modeling themselves off of the highly successful tactics employed by the Islamic State. Already, up to five thousand Uyghurs are returning home to China from having joined groups like ISIS in the Middle East, intent on carrying out vengeance against Beijing (Reuters, 2017). It is hard to imagine that after years of fighting with ISIS that these terrorists harbor serious reservations over the use of suicide attacks. ISIS has networks and affiliates throughout South and Central Asia, and Africa. Their effective use of suicide terror as a tool of coercion will facilitate the spread of martyrdom throughout contemporary terror networks.

### **Conclusion**

Chinese foreign policy provides a forum to interrogate social science questions that have traditionally been focused on Western Democracies. For decades, the primary units of analysis in studies which analyze international relations have been the United States, Western Europe, and Russia. Scholarship like Pape's has been trained in countries and metrics which map poorly onto the Chinese state structure. Such a different model of government and political body means that the labels which characterize Western institutions find few analogues in Chinese society.

Yet, while American labels rarely apply to Chinese institutions, the logic which characterizes Pape's causal mechanisms holds true. Instead of looking the checkbox criteria of 'democracy,' analyzing the underlying mechanism of cost tolerance highlights surprising parallels between the two countries. While Chinese projects rarely amount to Western-style 'foreign occupation,' the PRC's escapades inflame many of the same political grievances. The formal institutions are different, but the same basic incentives are at play. In other places, Pape's framework is more explicitly satisfied. China's religious differences with its target, mostly Muslim nations, mirror America's during the War on Terror. Suicide Terrorism, then as now, responds to political grievances against a culturally different foreign occupier who terrorists believe that they can coerce into concessions.

China's foreign policy makes retaliatory suicide terrorism, already nascently brewing, highly likely. Beijing's economic and military growth have led to a sprawling network of international commitments which threaten local ways of life, just as they threaten to draw Beijing further into heavier forms of engagements. The suicide terror which has already occurred as backlash to Chinese investments should be seen as a prelude to what will happen when Beijing's global investments mature.

**About the Author**

Jakob Urda is a fourth year undergraduate studying political science at the University of Chicago. He is the Deputy Data Manager at the Chicago Project on Security and Threats, where he analyzes data on international terrorism. Jakob would like to thank Professor Robert Pape for his guidance and feedback during the writing process.

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## Data

The data regarding suicide attacks was generously provided by the Chicago Project on Security and Threats (CPOST).

Chicago Project on Security and Threats (CPOST). 2019. Suicide Attack Database (January 2018 Release). [Data File]. Retrieved from [http://cpost.uchicago.edu/suicide\\_attack\\_database](http://cpost.uchicago.edu/suicide_attack_database).

# Income-Education Gradients in Developing nations: Creating a New Database of Income Levels

Tal G. Roded

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The purpose of this project is to accurately identify the correlation between parental income and children's education attainment across developing nations. Past studies have examined such a relationship mostly within developed countries and using proxies for income. This study explores the strength of that connection across developing nations that exhibit a variety of wealth distributions. It is the first such database that examines education in developing nations through income levels rather than income percentiles.

By converting the income distribution in each nation to standardized income levels, differences in income-schooling among diverse societies can be more accurately portrayed and compared. With a valid comparison tool, the effects of varying wealth levels upon children's schooling outcomes in any country can then be understood. The results are standardized income-schooling gradients for each developing nation and an analysis of the variation among these gradients.

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**A** primary determining factor for the amount of education a child will receive is parental income. When a family has higher income levels, children are more likely to receive more education. More educated children can have a major impact on all aspects of a society - certainly the potential for economic growth. Increasing the education of new generations is one of the driving forces behind developing and growing a country's economy. Thus, it follows that knowledge of how income changes can affect childhood education attainment are of essential importance for understanding the economic outlook of a nation. This is especially true for developing nations, in which children's education can greatly vary and hold great impact for the development of the nation as well as the shape of its future. Yet, most existing studies that compare family income and childhood education focus only on developed economies. Even rarer are studies that compare across developing nations, all

with varying income distributions and societal mobility. The issue is that income can be extremely difficult to measure in developing nations, where much of the population does not earn an income. Instead, many are self-employed, contract workers, or subsistence farmers - altogether not earning actual wages.

Consequently, if the effects of changes in income upon education attainment in developing nations are to be understood, a method must be developed to analyze and chart income and education. Current studies of developing nations only compare income percentiles to years of education received, resulting in an inability to compare across nations or to consider income variance within each nation. This research project focuses on supplying that missing information by creating a method for conversion from income percentiles to income levels. The results are estimated gradients of family income to childhood education that both account for income variance and are able to analyze the differences across developing nations. Every country has a unique wealth distribution and level of income inequality. This results in gradients of different slopes, representing the strength of correlation that changes in income can have upon years of schooling, dependent on the nation. Nations with steeper gradient slopes would be more responsive to income changes. Gaining an understanding of developing nations' income-education gradients will allow for greater understanding of the economic environment as a whole. Analysis of the gradients can reveal optimal economic policies for maximizing the effect of education loans and other strategies intended to influence the slope of the gradients.

### **Shortcomings of Existing Methodology**

The current standard approach for measuring income in developing nations relies on the Demographic and Health Surveys (DHS).<sup>1</sup> DHS are nationally representative surveys that provide data on family wealth/income and childhood schooling among many other variables. DHS utilize nearly identical questions across the developing nations surveyed, which allows for standardized comparisons

1           Demographic and Health Surveys program is funded by the U.S. Agency for International Development (USAID).

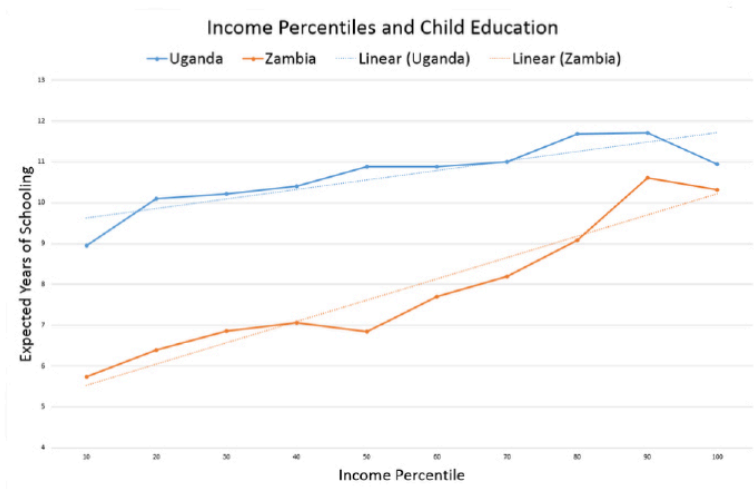


across these nations. Surveys are also done in waves every several years, with nearly identical question sets in each wave. The comparisons of developing nations done in this study are based off the results of these Demographic and Health Surveys. Rather than attempt to directly measure income, DHS instead uses households' answers to survey questions as proxies for income. For example, the surveys include questions such as "Do you have any livestock?," "Do you have dirt floors or solid floors?," and "Do you have indoor plumbing?" Questions of these types are more applicable to citizens of developing nations who do not earn wages. These proxy questionnaires are standard across all countries within the DHS database - over 90 in total. Taking the answers to the standardized questionnaires, one can then perform a principal component analysis<sup>2</sup> to achieve a unitless stand-in for income. This was first done by two researchers, Deon Filmer and Lant Pritchett, in a 1999 study that created an income proxy - income percentiles - from the DHS data.<sup>3</sup> Filmer and Pritchett were able to overcome the lack of information on incomes in developing nations through their method. The study shows that a linear connection did exist, with higher income percentiles resulting in more schooling for children. An example of a chart created from the method used by Filmer and Pritchett is presented in Figure 1.

### **Figure 1: Existing Methodology**

2            Statistical procedure that converts a data set described by several correlated variables into a new set of variables called "principal components". The new variable set may then map out the similarities of the data.

3            Filmer, D. and Pritchett, L. (1999), The Effect of Household Wealth on Educational Attainment: Evidence from 35 Countries. *Population and Development Review*, 25: 85–120. doi:10.1111/j.1728-4457.1999.00085.x



in many practical purposes. For one, using income percentiles for every nation eliminates information on income variance. Using the Filmer and Pritchett method, it is unknown if one country has a wider distribution of incomes compared to another. As a result of creating income percentiles from a principal component analysis for each individual country, this method creates income proxies that are non-comparable between countries. So while the Filmer and Pritchett study did reveal that higher income percentiles correlated with additional years of education, they did not reveal much more. The connection of income-education in one country could not be compared to that in another, limiting the usefulness of this method.

Perhaps an even greater shortcoming of the current methodology is the inability to calculate semi-elasticity in each nation. Semi-elasticity is a percent change in results according to an absolute change from the parameter. For example, the statement “A \$1,000 increase in income will increase expected schooling by 20%” states the semi-elasticity of schooling based on income. We are unable to figure out semi-elasticity with current methodology (the Filmer and Pritchett method), as we do not have income in numerical values - only

in percentiles.<sup>4</sup> Without an ability to compute semi-elasticities, we are again unable to compare across countries, preventing studies from being done on the effects of income changes or policies directed toward increasing education. By converting income percentiles into income levels, the door can be opened for such research to be done and for more effective economic policies.

## **Methods**

The goal of this project is to create income-education gradients of developing nations that can be compared to each other. These gradients consist of two variables - childhood education attainment and parental income level. To construct these gradients, several steps must be taken, beginning with transforming the data into a usable format. The main source of data comes from the Demographic and Health Surveys. The “childhood education attainment” variable is taken from questions on children’s schooling attendance for all children aged 6-18. The “parental income level” variable is taken from a principle component analysis of wealth percentiles, created through a set of questions on real economic conditions that is asked through the survey. A wealth percentile is then calculated per household from the results. The task is then to convert these unitless percentiles into income levels for every country.

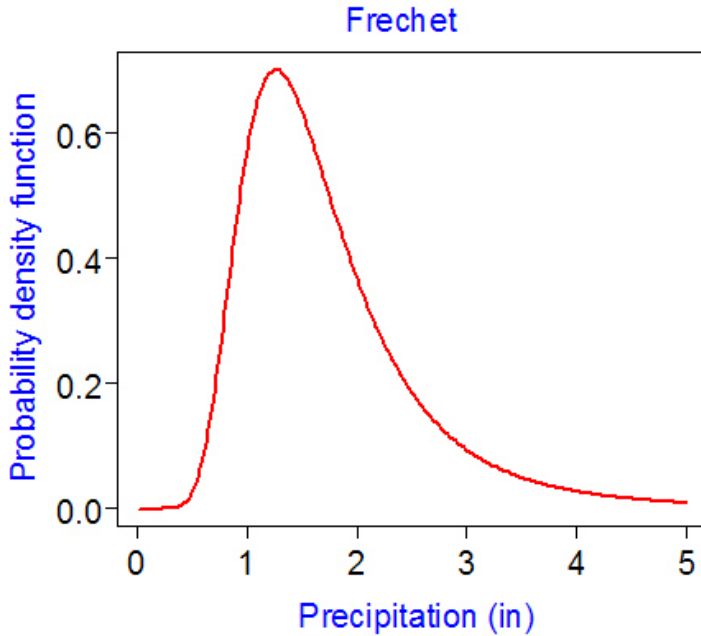
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<sup>4</sup> Wealth deciles with expected years of schooling are presented for two nations, Uganda and Zambia, in Table 1..

**Table 1: Wealth Deciles and Expected Years of Schooling for Developing Nations**

Country Name	Wealth Decile	Expected Years of Schooling
Uganda	1	8.945059
Uganda	2	10.09116
Uganda	3	10.22036
Uganda	4	10.40478
Uganda	5	10.87477
Uganda	6	10.88902
Uganda	7	10.99979
Uganda	8	11.67777
Uganda	9	11.70906
Uganda	10	10.94056
Zambia	1	5.738305
Zambia	2	6.397762
Zambia	3	6.856928
Zambia	4	7.063737
Zambia	5	6.847053
Zambia	6	7.705533
Zambia	7	8.193643
Zambia	8	9.076662
Zambia	9	10.60495
Zambia	10	10.31084

Source: DHS Program. Available Datasets, The DHS Program, [dhsprogram.com/data/available-datasets.cfm](https://dhsprogram.com/data/available-datasets.cfm).

**Figure 2: Frechet Distribution**

Source: “GEV Distribution.” Statistics of Weather and Climate Extremes

**Figure 3: Frechet Distribution Equation**

$$F(x) = e^{-\frac{x}{A} - \Theta}$$

To convert household income percentiles into income levels, a model of income distribution for any general society must first be constructed. I used a Frechet Distribution, or Maximized Extreme Value Type II Distribution, to map income distribution. Figure 2 provides an example of a Frechet Distribution. Specifically, a two-parameter Frechet Distribution was used, controlled by a shape and scale parameter as outlined in the function presented by Figure 3. The model takes in the mean income of the nation, measured by the GDP per capita, and the income distribution of the nation, measured by

the Gini coefficient.<sup>5</sup>

**Table 2: GDP per capita and Gini Coefficients of Developing Nations<sup>6</sup>**

Country Name	Wealth Decile	Expected Years of Schooling
Uganda	1	8.945059
Uganda	2	10.09116

The shape parameter ( $A$ ) of the model controls the average and can be adjusted to match the corresponding GDP per capita (mean income) of a nation. The scale parameter ( $\theta$ ) controls the variance of the model and can be adjusted to match the corresponding Gini coefficient of a nation. The Gini coefficient is a statistical measure of the degree of inequality of a data set and thus can be used to estimate the variance, or income inequality, of a country. A higher Gini coefficient signifies more inequality, while a lower Gini coefficient signifies less inequality. Meanwhile, a lower  $\theta$  results in more variance in our model, meaning greater inequality in the data. So by setting  $\theta$  to lower values I am able to simulate a country with greater inequality, or in other terms, a higher Gini coefficient. By repeatedly adjusting the  $\theta$  value of the model, the inequality of any country can then be estimated. The  $A$  parameter is then calculated from the  $\theta$  value,<sup>7</sup> and the end results are two parameters -  $\theta$  and  $A$  - that match the mean income and Gini coefficient of the desired nation. These two

5 The dataset used for GDP per capita and Gini Coefficient of each country is presented in Table 2.

6 As defined by Investopedia.com, GDP per capita is “a measure of the total output of a country that takes gross domestic product (GDP) and divides it by the number of people in the country.”

7 ‘ $A$ ’ parameter calculated from  $\theta$  parameter using the equation  $A = (\text{mean\_income}) / (\text{gamma}(1 - (\theta - 1)))$  where ‘mean\_income’ is the mean income of the desired country, ‘ $\theta$ ’ is the matching  $\theta$  parameter value, and ‘gamma’ is the gamma function.

parameters are plugged into the inverse Cumulative Distribution Function<sup>8</sup> of the Frechet Distribution and the result is a graphical model of a nation with mean income and Gini coefficient matching the parameters. The income percentiles of the model can then be calculated and compared to the income levels also produced by the model. This allows me to convert the existing percentiles data on developing countries into income levels data for each and every country surveyed by the DHS program. Once this is done, I then plotted the income levels against expected years of schooling for each country.<sup>9</sup> This achieves an income-education gradient that can be compared across developing nations.

**Figure 4: Inverse Cumulative Distribution Function of the Frechet Distribution**

$$iCDF = A * (-\log(\text{dataset})^{\frac{-1}{\theta}});$$

**Results and Discussion**

Using this new methodology, I can create an income-education gradients for any country surveyed by the DHS. For example, two developing nations included in the database are Uganda and Zambia - I ran both these through the new method. Figure 5 displays the results for when the model is run for Uganda and Figure 6 displays the results for when the model is run for Zambia.<sup>10</sup> Both are graphed on axes of expected years of schooling to parental income (measured in US dollars), with equivalent axes scales and ranges to allow for easier comparison. Uganda is a nation with a relatively lower Gini coefficient of 0.424, compared to Zambia with a Gini coefficient of 0.556. The results of these differences in Gini coefficients are partially displayed in the gradient for each nation. Uganda, with a low Gini signifying a more equal distribution of incomes, has a relatively flatter income-education gradient slope. This means that increases in family

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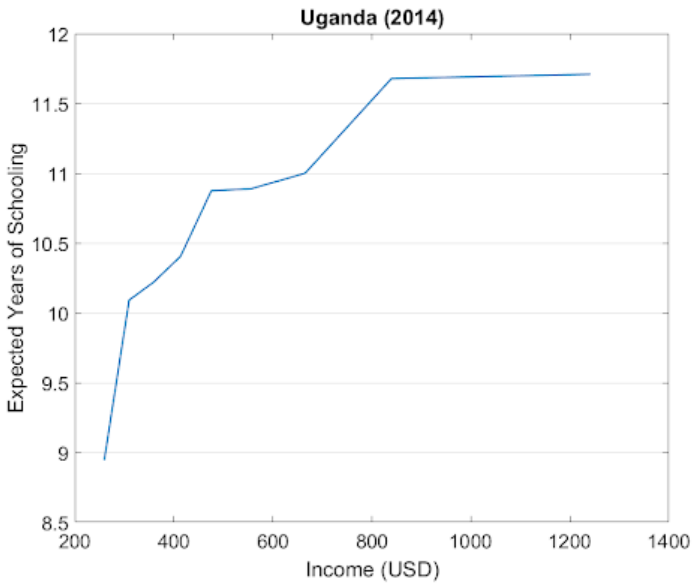
8 The inverse CDF of the Frechet Distribution is shown in Figure 4..

9 Data on expected years of schooling per country taken from the DHS database.

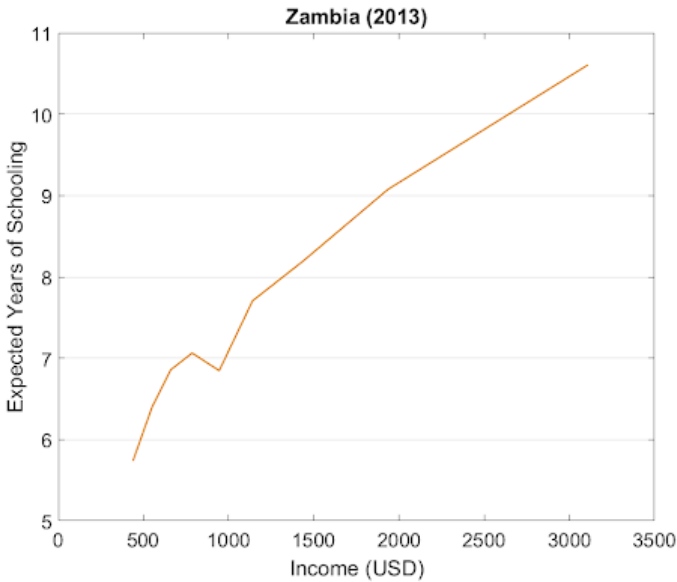
10 A slight downward spike is present at the \$1000 mark for Zambia's graph. This is likely a result of noise in the data taken from the DHS.

income will have lesser effects on expected years of schooling for children. On the other hand, Zambia with a high Gini coefficient, which signifies a more unequal distribution of income, has a relatively steeper income-education gradient slope. Increasing the income of families in Zambia, even for households in the higher income brackets, could have much more significant impacts for expected years of schooling compared to equivalent income changes in Uganda.

**Figure 5: Uganda Income-Education Gradient**





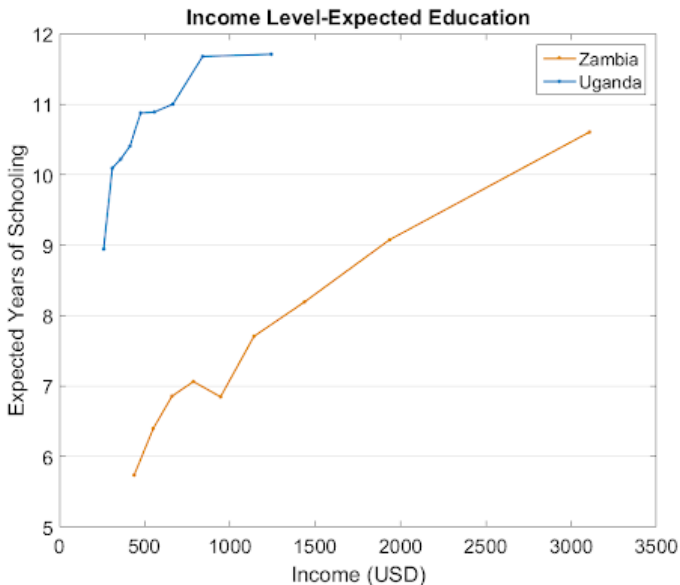
**Figure 6: Zambia Income-Education Gradient**

Putting these results in terms of semi-elasticity further illuminates the differences between the two nations, representative of the differences of low Gini coefficient and high Gini coefficient countries in general. To increase expected schooling in Uganda from 9 years to 10 years would take a relatively small increase in income - 20% of total income, which amounts to a \$50 increase.<sup>11</sup> To increase expected schooling in Zambia from 9 years to 10 years would take a greater increase in income - 40% of total income, or about a \$750 increase. Figure 7 shows the results of the above two countries being charted together. The difference in the gradient slope of Uganda and Zambia is readily apparent. Uganda's slope forms a downward concave shape while Zambia's slope is for the most part a linear pattern. These results further support the idea that Zambia's households are greater influenced by changes in income in comparison to Uganda's households. Comparing this new graph in Figure 7 to the chart of previous methodology, as shown in [Figure 1](#), reveals very different graphical interpretations of the

<sup>11</sup> All dollar amounts are considered in US Dollars valued at the time of the survey. This would be US Dollars in 2014 for Uganda and US Dollars in 2013 for Zambia.

income-education relationship in developing nations. The new methodology reveals much more information about the individual nations and provides a more accurate graphical portrayal of the income-education gradients of developing nations.

**Figure 7: Comparison of Uganda and Zambia Gradients**



## Conclusion

The income-education gradients constructed from this new method allow us to compare the relationship between parental income levels and childhood education attainment. These gradients pave the way for numerous further studies and applications. The results of economic policies such as loans for education or the effects on public education of income constraints can now be fully understood. Following this, the effectiveness of policies can be calculated and their actual statistical impact can be estimated for specific developing economics.

Understanding the actual impact that changes in income can have on a

country-to-country basis can have huge ramifications for efforts to improve education in developing nations. Increasing income in the USA will not have much of an impact for K-12 education - because of overall higher incomes as well as laws and expectations for children to receive education. In simpler terms, income is not a significant constraint on childhood education attainment. Even the children of the poorest families are expected to receive nearly equivalent years of schooling as the richer families for the first 12 years of education. So, introducing a policy that subsidizes education costs or provides grants to low-income families to send their children to receive K-12 schooling will likely not have a significant effect on education attainment. However, such a policy could have an incredible impact for families in Uganda earning between \$200 and \$800 per year.<sup>12</sup> Here, we see in our income-education gradient a very steep slope, revealing that increasing income can boost schooling attainment by up to 3 years. In Zambia, we find that such a policy would have an even greater effect, that by boosting the parental income from \$500 to \$2500 we may be able to increase years of expected schooling by up to 4 years. By running the new method for any other developing nation in which data from the DHS program or other sources exist, additional income-education gradients can be built and similar analysis made. This allows for effective policy actions through specializing education loans on a per country basis and an accurate tool for predicting the actual educational impact of income changes depending on the country and current level of income. Reliable data on income in developing nations has before now been sparse and limited in function. Now that there exists a database of developing nations' income levels, with a method for comparing expected years of schooling to parental income, more accurate research can be done on the incomes, education, and economies of these developing nations.

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12            Refer to Figure 5.

**About the Author**

Tal is a third year undergraduate studying math and economics at UC San Diego and is passionate about economic research. This past summer, he conducted an independent research project on income levels in developing nations and presented his work at the UCSD Summer Research Conference. He plans to work towards a Ph.D in Economics and eventually go into macroeconomic research. He would like to thank Dr. David Lagakos for his mentorship and guidance on his project, research, and paper.

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# The Role of Narrative in Popular Belief:

## An Analysis of Brexit

Rebecca M. Hill

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The British people's decision to leave the European Union (EU) in the Brexit referendum of June 23, 2016, widely shocked British politicians and academics aware of the economic benefits of EU participation. Drawing from narrative economics, a field recently introduced by acclaimed economist Robert Shiller, this paper examines the power of narrative and its influence on the British people's vote. Of the narratives circulating the UK prior to the Brexit referendum, three broad concepts pervade: migration, globalization, and the idea that the EU is holding Britain back. Through the use of Google Trends and sentiment analysis, this paper evaluates the prevalence of each narrative in the UK prior to the vote and concludes that the trends of social media and internet use are an important source of data on popular opinion, which should be utilized more widely by economists and other social scientists in the future.

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One of the most intriguing parts of the Brexit vote, held on June 23, 2016, was the fact that virtually no popular polls predicted the British people would vote to leave the European Union. European fiscal integration, first negotiated following the social and economic devastation of WWI and WWII, seemed well-established to many British politicians and academics. Clearly, Britain benefits from its participation in the EU; due to the EU's lack of trade barriers and specified free movement of people, it makes up half of UK imports and exports. Academics widely agree that participation in the EU accounts for a significant portion of the UK's GDP (Dhingra, Ottaviano, and Sampson 2015). So, why was the majority of the UK's population willing to risk economic decline, high tariff rates, customs duties, non-tariff barriers, a loss of access to the European Free Trade Association (EFTA) and the European Economic Area (EEA), and Britain's status as a world economic leader in order to separate the nation from the EU and continental Europe? The recent work

of Nobel Prize-winning economist Robert Shiller would indicate that these outcomes were not what the British people had in mind when they voted out. Rather, the Brexit decision “is related to the prevalence and vividness of certain stories, not the purely economic feedback or multipliers that economists love to model” (Shiller 3). The concept of narrative economics, which Shiller recently introduced as a new method for viewing major economic events such as the Great Depression and the Great Recession, sheds significant light on the popular turn against the EU that led Brexit to occur.

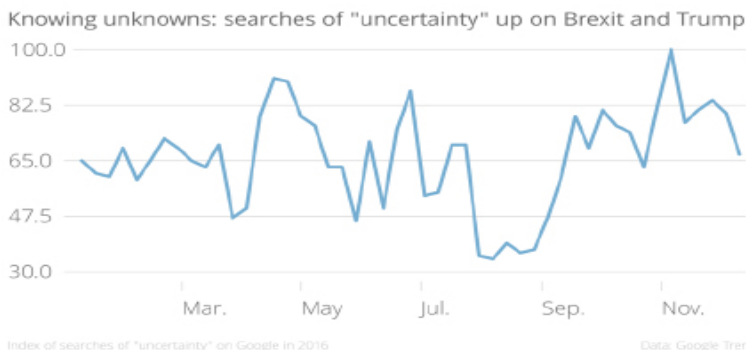
Narrative economics, as Robert Shiller defines it, is “the study of the spread and dynamics of popular narratives, the stories, particularly those of human interest and emotion, and how these change through time, to understand economic fluctuations” (3). These narratives are human constructs: simple stories, easily expressed, that individuals seek to bring up in conversation because they stimulate the concern or emotions of others, or because bringing up these stories advances self-interest. It has long been recognized, in fields ranging from criminology, to religion, to psychology and sociology, that stories are a significant and contagious method through which cultural and political beliefs are spread throughout society. Anthropologists report that a universal characteristic of the diverse tribes and peoples found around the world is that they all “use narrative to explain how things came to be and to tell stories” (Brown 1991). Often, the human mind uses narratives as scripts: for instance, when an individual finds themselves in an ambiguous situation, they will think back on similar narratives and adopt a role they have seen acted out before. Thus do narratives produce social norms, which then influence and govern our socioeconomic actions. The human mind also has “a tendency to form a personal identity and loyalty to friends built around perceived plots of others”—a predisposition to identify conspiracy, whether or not it exists (Shiller 10).

While it is difficult to identify why certain narratives go viral while others barely spread beyond the creator, there are several characteristics of narratives that are consistent. Like all stories, narratives are formulaic, and, in the sense that we will discuss them, to some extent dishonest or manipulative. They are



created by just one or a few people, and from there spread outwards, with the potential to influence huge swaths of a population. While the creator may have crafted the narrative strategically, to gain some advantage, creators tend to end up believing the fake news they created. They also have little control over the message after they first spread it: the spread of a narrative is affected by frequency of contact between the number of people who bear the message, the number who have not yet heard it, and the number who have heard it, believed it, and then forgotten or moved on (Kermack-McKendrick SIR Model for Disease Infection).

With that being said, what makes someone believe a narrative they have heard? Listeners are more susceptible to belief under several circumstances. One is the representativeness heuristic, identified by Kahneman and Tversky in 1973, which proposes that people form their expectations about a circumstance based on its similarity to some idealized story, memory, or model, and while doing so, neglect base-rate probabilities. This, of course, can easily propagate racism, sexism, and a whole range of negative stereotypes. The affect heuristic, meanwhile, suggests a concept quite similar to nudge theory—that “people who are experiencing strong emotions, such as fear, tend to extend their feelings to unrelated happenings” (Shiller 12). In this way, a local earthquake, for example, might negatively influence professional estimates of the likelihood of a stock market crash (Goetzmann, Kim, and Shiller 2016). Previous research of the European Central Bank has shown that up to 20% of the fluctuations in the economy are caused by uncertainty, and indeed, in the weeks before and following the Brexit vote, British news outlet City A. M.’s research shows “uncertainty” was a hot topic.



So it could be that what led many British citizens to vote for Brexit was not the careful consideration of Britain’s economic future, but uncertainty, and the belief in one or more of several virulent narratives that had been circulating the UK in the days and months before the vote. As Peter Praet, the chief economist of the European Central Bank, commented, “the outcome of the UK referendum can be partly attributed to the decades-long development and spread of negative popular narratives about European integration.” Some of these narratives, such as the nationalist claim that the UK is stronger without the EU, are indeed long festering stories, while others, such as the threat of terrorism and the refugee crisis, are more recent developments. In the next few pages, as aided by statistics from original and academic research, I will use the lens of narrative economics to demonstrate that various popular narratives circulating the UK in the weeks before the vote combined in force to encourage British citizens to vote for Brexit, whether or not this exit is really in their future economic interests.

### **Narratives**

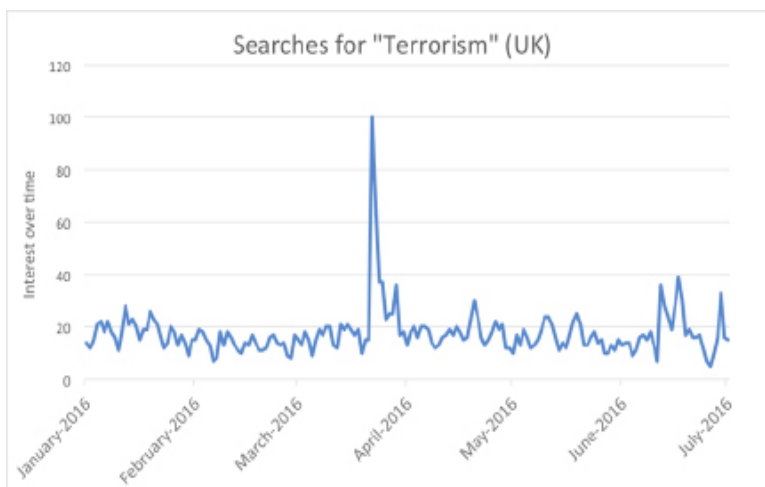
Of the negative narratives circulating the UK on and before June 23, 2016, three broad concepts pervade: migration, globalization, and the idea that the EU is holding Britain back. The stories on migration alone can be split into several shorter narratives. Migration has been a charged issue in Britain for years; in a 2013 survey, the Royal Statistical Society (RSS) found that the public believes 31% of British population to be immigrants, when in fact the number is only

15%--less than half the amount assumed. One of the common stories circulating the UK suggests there is so much immigration that public services such as the NHS are being inundated and are unable to provide for British natives as they should (Saul 2016). Undoubtedly, this story was fed by a parallel claim of the Leave campaign: that the money the UK gives to the EU could be spent on the NHS instead. Yet responsibility for the stretching of British public services lies not with immigration levels, but in fact with cuts made by the former PM, David Cameron. We must also recognize that this scapegoating of immigrants as the cause of British economic problems is in part due to racism, which appeals easily to the representativeness heuristic of listeners, and is sometimes not even subtly expressed. In a poster unveiled by the leader of the anti-EU UKIP party leader, Nigel Farage, six days before the Brexit vote, nonwhite migrants are pictured traveling in mass toward an unspecified destination. When questioned on the issue, Farage responded,

Frankly, as you can see from this picture, most of the people coming are young males... you don't know that [they are refugees]. They are coming from all over the world. If you get back to the Geneva Convention definition, you will find very few people that came into Europe last year would actually qualify as genuine refugees... When ISIS say they will use the migrant crisis to flood the continent with their jihadi terrorists, they probably mean it. (Stewart and Mason 2016)

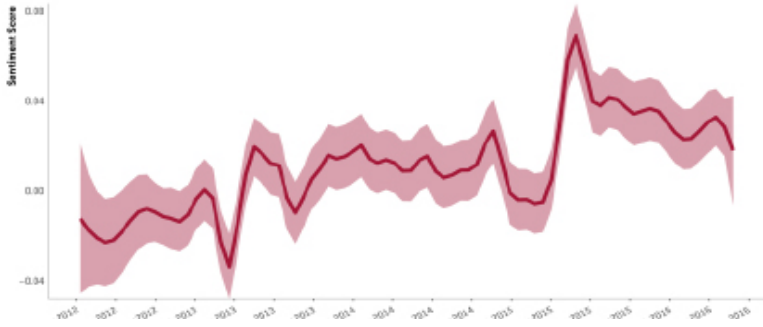


This runs into another troubling narrative about migrants to Britain—that many are potential terrorists and allowing them to enter the country risks the safety of British citizens. When surveyed about violent crime, 51% of the British population reported it was on the rise, when in fact it has been falling for years (RSS 2013). The threat of terrorism has been a prevalent narrative since 9/11, which re-intensifies every time another major terrorist attack occurs. As seen below, in the few months before the Brexit vote, “terrorism” became a pressing focus of popular concern. In late March, the 2016 Brussels bombing (organized by the same terrorist group that led the November 2015 Paris attacks) caused a spike in Google searches of the word “terrorism” in the UK, and on June 12, very close to the referendum, searches spiked once again as the Orlando nightclub shooting brought the issue of terrorism to the forefront of British minds.



After the Brexit referendum, Guisepppe Porcano and Henrik Muller of Bruegel conducted a sentiment analysis of tweets made about Brexit in the months leading up to the vote. Sentiment analysis is a recently developed form of statistical analysis that uses natural language processing, text analysis, and computational linguistics to determine the stance or attitude of a writer toward the topic they are commenting on. Procano and Muller found that up until

the European refugee crisis began coming to a head in May 2015, sentiment toward Brexit was largely negative. Once this crisis occurred, however, support for Brexit skyrocketed, and sentiment values remained positive, or pro-Brexit, until the June 2016 referendum.



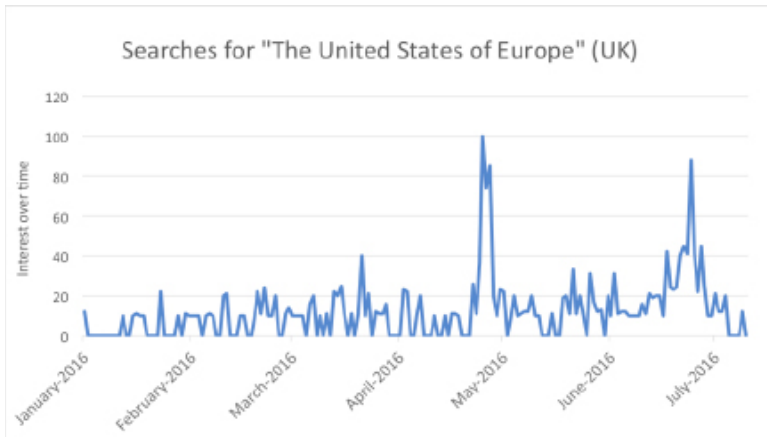
Yet the topic of migration was not the only narrative that swayed British voters. As one citizen expressed, “We used to rule the world, back before the EU, and... with Brexit we could do so again” (Saul). The narrative that the EU is holding Britain back is based in nationalism, and can be divided into two overlapping yet distinctive stories: that the EU limits Britain economically, and that the EU limits Britain politically.

The economic narrative holds that the EU imposes too many rules and restrictions upon the UK, and uses up its money without giving enough back in return. There is some truth to this idea; in 2010, the British Chambers of Commerce Burdens Barometer report found that an estimated one third of the country’s regulatory burden comes from EU directives. Yet although the UK does contribute more to the EU than it receives in monetary returns, this is only to a value of eight billion pounds a year, which makes up just 0.5% of GDP (European Commission, EU Financial Report 2015). There is also little truth in the Leave campaign’s widely influential claim that the UK sends 350 million pounds to the EU per week; the UK neither physically sends this money weekly, nor is the real amount 350 million. In reality, it is more than 100 million pounds less (Henley 2016).

As for the claim that there are an egregious number of rules and

regulations that the UK must comply with as a member of the EU, this too is based on false premises. “Brexit: The Movie,” a widely circulated, feature-length anti-EU film, claimed for instance that under EU law, pillows were subject to 109 separate regulations. In actuality, a good number of the regulations listed in tiny print on the screen had nothing to do with pillows. Rather, they included such regulations as, for instance, a rule on “the classification of a breakfast cereal ‘cut into the shape of pillows’” (Oliver 2016). While this did mislead voters, small regulations still are not making much of an economic difference for the UK. The most costly EU regulations that the UK adheres to concern employment rights and environmental protection—regulations that would not necessarily disappear if there were a soft Brexit, and that could easily be reproduced in UK law should a hard Brexit occur (Hunt, Wheeler 2017).

Narratives about the political influence of the EU on the UK center around the idea that if the UK is free to make its own laws, “unencumbered by the other 27 members, the UK can get on with things and start adopting a much more independent, self-confident, assertive role on the world stage” (Smith 2016). At this point, of course, the only European integration the EU specifically promotes is in fiscal policy and the universal protection of human rights. Neither of these points threaten Britain’s state sovereignty. Yet many British citizens fear a “United States of Europe,” and notably, the phrase spiked in Google searches just two months before the Brexit vote.



The primary reason for this spike was a press release of plans for an integrated “United States of Europe,” which was drawn up by speakers from the national parliaments of Germany, France, Italy, and Luxembourg seven months before. Of course, the distance between the date of the press release and the date the document about integration was originally released adds a degree of skepticism to the believability of the narrative. But as one flashy Daily Mail article on the subject declared, “Britain will have ‘very little say’ [in plans for a United States of Europe], a Cabinet minister warned today” (Slack 2016). Never mind that the Cabinet minister who warned this was Chris Grayling, a leading voice of the Leave campaign. The representativeness heuristic predisposes listeners to believe this narrative, given it fits with narratives that they have heard before. Many British citizens seemed to believe that the UK could not influence the direction of the EU, and that political participation in the EU was encroaching on British sovereignty and holding the nation back.

One final broad narrative that defined the popular move for Brexit was based in a rejection of globalization, as well as a rise of populism. Studies have shown that the people who voted for Brexit were older, poorer, less educated, and more geographically remote than those who voted against it (Hunt and Wheeler 2017). Even back in 2013, when the Ipsos Mori Social Research Institute conducted a survey on British beliefs about the state, the managing director noted “a lack of trust in government information” among

respondents. Popular resentment of the entrenched poor and working class against supposedly self-interested politicians and members of the elite has been simmering for decades. Only recently, as other narratives against the EU, migration, and change have intersected and compounded have the British people suddenly felt empowered to act on populist ideals. In rebelling against major institutions such as the EU, marginalized Brits feel as though they are participating in a victory of rational judgment over the indoctrination of the establishment. However, in doing so, many fall victim to Shiller's noted predisposition of the mind to see conspiracy.

### **Conclusion**

In the end, as Shiller pointed out, a significant socioeconomic event occurs as a result of many compounding narratives. It is nearly impossible to predict beforehand whether there are the right number and type of narratives, spread to the right number and type of people, to significantly influence the outcome of a given event. However, the outcome of the Brexit vote was at least in part due to the negative narratives about migration, globalization, and the EU that, circulating the British Isles in the days, months, and years before the referendum, emotionally mobilized the people to vote out. Yet there are still potentially influential narratives that I have not had the space or time to mention, such as the threatened collapse of the euro, which may have had an impact on the outcome as well. It is too late to change the vote. However, looking forward, we can recognize the potential of narrative economics in future analyses: it opens to researchers not an answer as to why and when people suddenly act emotionally and irrationally, but rather a suggestion of how these mood swings might be anticipated. As demonstrated in the Google Trends graphs throughout this document and in the sentiment analysis conducted by Bruegel, there is much data to be gleaned from popular social media and internet use. This does not mean that researchers will always know what to look for. However, social media is a vastly untapped resource, potentially applicable to fields of science ranging far beyond typical "soft" sciences like psychology and sociology. That



said, researchers must be willing to recognize the value of story and the spoken word. Narrative is a fundamental and biological component of human life, and identifying it as such will only further scientific attainment.

### **About the Author**

Rebecca Hill is a fourth year undergraduate studying English and Economics at the University of Connecticut. She is currently working on a novel examining mental illness in women, which will be accompanied by a critical essay exploring economic influences on the choices of women with mental illness.

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## Regaining Control in the Pacific: Recommendations for the U.S. Approach to China's Asian Infrastructure Investment Bank

Lisa J. Xiao

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This paper analyzes the current positions of the United States and China in the establishment of the Asian Infrastructure Investment Bank (AIIB) from an economic, political, and ideological lens and provides recommendations for the U.S. approach to the AIIB in order to regain control in the Pacific. The establishment of the AIIB marks the rise of China in the Asia-Pacific region and a consequent threat to the United States' Asia rebalance strategy and goals of advancing the United States' strategic position in Asia. China's motivations in establishing the AIIB have brought about controversies in the international community and inconsistencies internally. Since China announced its intentions to establish the AIIB, Washington has grudgingly accepted its establishment, challenged many internal inconsistencies, and raised debates about external controversies.

Ultimately, it is in the United States' best interest to implement a two-pronged approach. One, the United States should join the AIIB and exert influence in the Asia-Pacific region from within the bank. Two, Washington needs to improve the current practices of the Asian Development Bank and the World Bank by striving for greater efficiency, allowing developing countries to have a greater voice, and increasing its efforts in providing infrastructure financing in the Asia-Pacific region. In the end, Washington's Asia "rebalance" strategy will require subtlety, moving forward as it joins the AIIB and to reform incumbent institutions in order to meet the infrastructure demands and continue to advance the U.S.'s strategic position in Asia.

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**B**asics of the Asian Infrastructure Investment Bank: In October 2013, China announced its intention to establish the Asian Infrastructure Investment Bank (AIIB), an international financial institution that aims to support the building of infrastructure in the Asia-Pacific region.<sup>1</sup> On October 24, 2014,

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1 China's Asian Infrastructure Investment Bank: Knowns, Unknowns. (n.d.). Retrieved from <http://www.bloomberg.com/news/articles/2015-03-31/china-s-asian-infrastructure-investment-bank-knowns-unknowns>

twenty-one countries signed on to a memorandum of understanding (MOU) in a ceremonial launch for the AIIB.<sup>2</sup> On June 29, 2015, a signing ceremony of the Articles of Agreement (AOA) with fifty countries marked its formal establishment.<sup>3</sup> To date, the bank has 56 member states and 80 approved members.<sup>4</sup>

The AIIB is headquartered in Beijing, China. The AIIB has an authorized capital stock of \$100 billion. It is divided into one million shares, with a par value of \$100,000 each.<sup>5</sup> The bank also has a board of governors, board of directors, a president, one or more vice presidents, in addition to other offices and staff as needed. Each AIIB member is able to appoint a governor to have its representation on the board of governors, which meets annually.

### China's Motivations

Since declaring its intentions of establishing the AIIB, China has prioritized and invested significant political capital to rally regional support, increase its membership base, and address doubts from the international community. China has multiple motivations in establishing the AIIB. The most apparent and altruistic one is to help the region meet its increasing need for infrastructure development funds. China would be able to meet this need because of China's excess capacity and do so while increasing influence on trade abroad. The other motivation is to democratize the international order. Washington has viewed this as Beijing's challenge to the U.S.-led global economic order. The AIIB can also be motivated by the strategic gains that China would be able to acquire by the relationships it would be able to build with countries in the region.

According to the World Bank, there is a \$1 trillion infrastructure shortfall in low and middle income countries. As countries grow and continue to develop, they will continue to increase their demand for infrastructure. In

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2 Ibid.

3 Asian Infrastructure Data (World Bank). (n.d.). Retrieved from <http://data.worldbank.org/topic/infrastructure>

4 Ibid.

5 Interview: Jin Says AIIB May Lend \$2 Billion, Announce Projects in June. (n.d.). Retrieved from <http://www.bloomberg.com/news/articles/2016-01-22/jin-says-aiib-may-lend-2-billion-announce-projects-in-june>

a 2009 Asian Development Bank (ADB) report, Asia will need to invest \$8 trillion in national infrastructure projects and an additional \$290 billion in regional infrastructure projects in transportation and energy during the period of 2010 – 2020. The AIIB will provide increased funding for infrastructure in such areas as energy, telecommunications and transportation.<sup>6</sup> This is of particular importance for Asian countries undergoing rapid industrialization and urbanization.

The AIIB is also aimed at promoting China's "One Belt, One Road" strategy, one of the most important strategic initiatives that Chinese President Xi has adopted since 2013. Beijing has identified this initiative as the most important mid to long-term strategy to foster China's economic restructuring and boost the nation's slowing economic growth.<sup>7</sup> This is regarded in China as a renewed version of China's "opening-up" policy. Their key projects focus on national and intra-regional transportation, power, and telecommunications infrastructure. The new Silk Road Economic Belt is designed to link the country with Central Asia, the Middle East and Europe, and the Century Maritime Silk Road, in order to connect China to Southeast Asia, Europe, and Africa. The AIIB is believed to be able to help the implementation of the "One Belt, One Road" strategy. In fact, Chinese analysts and policymakers view this as the government's mechanism of providing financial and technical support in implementing the strategy.

Further, the AIIB will endow China with the opportunity to export its excess capacity. One of China's economic priorities is to address the problem of excess capacity and burgeoning foreign exchange reserves. More precisely, there was a series of massive government stimulus packages after the 2008 financial crisis, which was able to generate growth but also created excess

6 Press Release: Despite \$28 Billion Drop in Global Private Infrastructure Investment in Energy, Transport, and Water, Strong Showing of Renewable Energy Projects. (n.d.). Retrieved from <http://www.worldbank.org/en/news/press-release/2015/12/15/global-private-infrastructure-investment-in-energy-transport-and-water>

7 Interview with AIIB's Jin: China Is Doing Fine. (n.d.). Retrieved from <http://www.bloomberg.com/news/videos/2016-01-22/aiib-s-jin-says-china-is-doing-fine>

capacity. This combination of excess capacity and capital has led to the creation of the “Chinese Marshall Plan,” which envisions large-scale capital investment in the infrastructure of emerging economies along the “One Belt, One Road” strategy. This allows China’s foreign reserves to turn into practical assets, while the excess capacity can be absorbed by a growing Asian infrastructure market. The plan would also serve in the interests of Beijing because of its ability to generate jobs for Chinese laborers.

China also believes that infrastructure development financing by the AIIB could popularize the renminbi (RMB) as a traded currency within the international community. This has critical political and ideological implications, because China sees that the basis for American financial hegemony is established by the status of the U.S. dollar as the main reserve currency in international trade and finance. The internationalization of the RMB through the establishment of the AIIB would decrease the dollar’s influence in the international finance community. The internationalization of the RMB relates to the more general goal of the AIIB – democratizing the international economic order. China strives to reform the existing international financial system in an effort to accommodate its own expanding economic power and influence. China has historically supported and continued to maintain its support for the system of Bretton Woods institutions (i.e. the World Bank, International Monetary Fund, and ADB), which many recognize as institutions dominated by the West, under American leadership, and thus unfairly disadvantaging China in the international economic system. Chinese leaders have asserted in the past their frustrations by such an existing multilateral financial institutions’ governance structures, because they have yet to evolve to reflect the new distribution of power in the global economy. For example, while China’s GDP was \$10 trillion in 2014 and is expected to surpass that of the United States within a decade to become the world’s largest economy, its voice in these multilateral financial institutions has not caught up with its economic stature. In fact, China holds only 3.81% of the votes in the IMF while the United States holds 16.75%. Also, the position of the IMF president is

reserved for a European, while that of the World Bank has historically gone to an American. It is clear that a need for reform is recognized. At the same time, any proposed changes to the existing Bretton Woods system face an uncertain future. Even in 2010, when IMF member countries struck an agreement to boost the combined voting power of emerging markets (e.g. China, Brazil and Turkey) from 42.1% to 44.7%, the U.S. Congress failed to sanction the agreement because of concerns that the deal would weaken Washington's influence in the IMF (even though the United States would nonetheless retain veto power in the institution).

While Beijing claimed to have established the AIIB based primarily on economic considerations, strategic considerations also play a significant role. Beijing's financial contributions to regional infrastructure and economic development through the AIIB will assist and improve China's overall relations with countries in its periphery – particularly in its efforts building the regional transportation network and trade agreements as to be facilitated by the AIIB. It is natural that tighter economic relations between China and surrounding countries will translate into greater strategic influence from Beijing throughout the region. It is no secret that heightened tensions over territorial and maritime disputes since Xi's inauguration have damaged China's reputation and relationships. It is Beijing's hope that the AIIB's economic impact will help reverse this trend by improving China's image and providing incentives for the otherwise unaccommodating nations to cooperate with Beijing. Framed in a less amicable way, the support that the AIIB provides to developing countries in the region may provide China with the leverage it needs to discourage countries from adopting anti-China policies. For instance, given the Philippines' approach toward China over disputed territory in the South China Sea, it would be difficult for the Philippines to receive favorable considerations by the AIIB and the Silk Road Fund – two financial institutions that China dominates.

The AIIB is one of the key drivers of China's pivot to avoid confrontation with the United States in the Asia-Pacific region and to seek an alternative sphere of influence in the vast area westward of China. The AIIB may also

aim to improve China's national security and external environment through stronger and better ties with Central Asian and Middle Eastern countries. Thus, this westward strategy included an important national security component with the goal of fighting terrorism, religious extremism and separatism in the volatile Xinjiang Uyghur Autonomous Region.

In the end, while this is a clear strategic utility of the bank, the vast majority of the international community and within the internal sphere of Chinese analysts and policymakers believe that the foremost role of the AIIB is to be a commercial bank and should thus be treated as such. This stance is necessary to ensure that there is demonstrable reluctance to allow political consideration to interfere with the AIIB's decision-making.

#### Further Concerns about the AIIB

These diverse goals in forming the AIIB also bring along many controversies in the international community and internal inconsistencies. Since China announced its intentions to establish the AIIB, Washington has raised debates about these external controversies and challenged these internal inconsistencies. The AIIB faces several inherent challenges ahead. Questions have been raised about the validity of China's claims to altruistically provide funding for infrastructure projects. There are also concerns about the amount of financial risk the bank will take on by funding high-risk infrastructure projects. The international community has also raised questions about the bank's identity – whether it is a multilateral development bank or a foreign aid agency. China is the largest shareholder in the AIIB. Naturally, Beijing is also pursuing some of its national interests through the bank. For instance, the AIIB has been closely related to China's "One Belt, One Road" strategy, which aims to export China's operations abroad through infrastructure projects.<sup>8</sup> As a result, the international community has raised questions about how the bank's decision-making process will be able to balance China's high stake in the bank and the interests of other

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8 Xi Jinping Says AIIB to Boost Asia Infrastructure Investment. (n.d.). Retrieved from <http://www.bloomberg.com/news/articles/2016-01-16/xi-jin-ping-says-aiib-to-boost-infrastructure-investment-in-asia>



members. China has stated that it aims to maintain high standards at the bank while concurrently making fast decisions through a lean hierarchy that does not have a resident board for oversight.

There exist uncertainties about the AIIB's fundraising model, loan guarantee system, and collaborations with existing multilateral institutions.<sup>9</sup> While the AOA has provided some answers to the international community, there remain many details to be worked out. After China announced its plan to establish the AIIB, questions arose about how this new bank would handle relationships with existing multilateral development banks. Beijing mostly downplayed the idea of a competition among the banks, and emphasized rather the potential for a mutually complementary relationship with the banks, particularly with the World Bank and the ADB.<sup>10</sup> To date, AIIB's initial projects are mostly complementary to existing multilateral and national institutions.<sup>11</sup> This will likely change in the near future. While the potential for complementary relationship exists, the reality is that the market for infrastructure finance is limited. Indeed, the demand in this market is large enough to accommodate all three banks. At the same time, there are limited high quality projects and the competition for these projects is steep. As a result, the AIIB will either fund projects that the World Bank and ADB reject or compete with the World Bank and ADB over fundable projects in the Asian region. The assessment is that the latter is inevitable. This kind of competition may not be a bad thing. It could induce these existing institutions to improve their operations and efficiency while reforming current management structures. In the possibility that the AIIB collaborates with the World Bank and ADB on certain projects, this would diversify the allocation of funds that go into riskier

9 Who's Afraid of the Asian Infrastructure Investment Bank? (n.d.). Retrieved from [http://www.bloomberg.com/news/articles/2015-03-20/who-s-afraid-of-the-asian-infrastructure-investment-bank-](http://www.bloomberg.com/news/articles/2015-03-20/who-s-afraid-of-the-asian-infrastructure-investment-bank)

10 "Asia-Pacific Rebalance 2025: Capabilities, Presence and Partnerships." Center for Strategic and International Studies: January 2016. Available at: [http://csis.org/files/publication/160119\\_Green\\_AsiaPacificRebalance2025\\_Abridged\\_Web.pdf](http://csis.org/files/publication/160119_Green_AsiaPacificRebalance2025_Abridged_Web.pdf)

11 For a list of the AIIB's currently approved projects, see: <https://www.aiib.org/en/projects/approved/>

projects. The different banks could also complement each other in terms of funding, functional expertise, and infrastructure project specialties. At the same time, since the AIIB has yet to fully clarify and validate its operating and fundraising models, the likelihood of collaboration of such a nature remains uncertain.

From an ideological perspective, the AIIB and China's other foreign investment strategies have been criticized as being "neo-colonial." Such criticisms have largely been placed in the context of China's involvement in Africa and Central Asia, where China's investment focuses on extraction of resources and building the infrastructure that is necessary to make such extraction possible. Similar to India's project Mausam, it mobilizes the Chinese diaspora. Debates currently exist about whether it is a means of imperialist expansion or an innocent revival of pre-1400 global trade. For example, China's role in Kazakhstan's oil sector and Kyrgyzstan's re-export market has significantly grown. As a result, Kazakhstan's economy has become increasingly geared towards this outside power. However, such criticism of neo-colonialism is flawed because neo-colonial endeavors also often include subsuming the existing political or cultural systems by the neo-colonial power from another nation. China explicitly avoids any inferences to such possibilities in its public statements.<sup>12</sup> This is in fact a part of the appeal that China promotes to encourage investments into other nations. In addition, just as Japan's influence on the East Asian bloc in the late 20<sup>th</sup> century was diminished when China, with its large population and economic size, integrated itself within the bloc, China also competes for power and influence – be it political or economic – with Russia and the United States in Central Asia.<sup>13</sup>

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12 Rachel Brown (2015) "Where will the New Silk Road Lead? The Effects of Chinese Investment and Migration in Xinjiang and Central Asia."

13 Ibid.

## **Past Response from the United States and the Asia Rebalance**

### **Strategy**

A part of Washington's Asia "rebalance" strategy is to secure substantially increased investment in the Asia-Pacific region. This includes investments of a diplomatic, economic, and strategic nature. The Obama administration made strengthening U.S. leadership in Asia a top priority of its foreign policy. However, since the inception of this rebalance strategy, Washington has had to answer to accusations that this strategy is simply one of containment aimed at China. The Chinese fears of encirclement are triggered when the United States makes a priority to strengthen ties with old allies and to forge new security partnerships with China's neighbors. Consequently, the challenge to Washington has been to engage diplomatically with Beijing to reassure China that the administration does not intend to contain China. Rather, Washington sees Beijing as an important partner, and, at the same time, the U.S. still maintains its security commitments to its East and Southeast Asian partners. This balance of a dual commitment is important at times when the Chinese are increasingly assertive in its territorial disputes.

The point is not that the United States has succeeded in assuaging Chinese fears or in reducing tensions between China and the United States, but that the administration believes it is important to avoid the impression that it seeks to contain China. Since 1945, the U.S.-led multilateral development banks (MDBs) have aimed to uphold high standards in transparency, debt sustainability, the environment, and project procurement. For six months following Beijing's announcement in October 2013 that China intended to create the AIIB, the Obama administration simply ignored the proposal. After nearly a year of deliberations about how to respond to the AIIB, Washington was still more focused on citing the AIIB's shortcomings rather than offering a constructive response to Asia's need for infrastructure investment. More than a year later, the Obama administration's position only evolved marginally from disapproval to a grudging acceptance. The U.S. has arrived at this position of acceptance only after ignoring the AIIB, debating whether there was a way

for the administration to push away the proposal, and dissuading allies from joining. The U.S. attitude towards the AIIB appear narrow and negative – pointing out problems with the bank, its membership, its relationship with other institutions rather than offering a response that addresses the issues raised by China’s proposal. Nonetheless, the United States has consistently dispelled the notion that the U.S. government opposes the creation of the AIIB. For instance, in the April 28, 2015 joint press conference between U.S. President Barack Obama and Japanese Prime Minister Shinzo Abe, Obama stated that Asia needs infrastructure, and it would be in everyone’s benefits for an institution like the AIIB to allow countries who have difficulty financing infrastructure to gain access to such financing in order to put infrastructure in place and consequently grow more rapidly.<sup>14</sup> China has been running a large account surplus for a long time, and the AIIB would allow China to put capital into development projects around the region.

When the United States was confronted with this proposal, the administration was unable to see its upside. Beijing was not only seeking a multilateral solution to a regional problem, but also pursuing technical assistance from experts with experience in managing existing development banks, including the ADB. Instead, the United States focused on the threat to existing international financial institutions, the risks to borrowers and the broader threat to the U.S.-led international economic order. As a result, when China’s initiative was taking shape and garnering support, Washington devoted more energy to dissuading its allies and partners from participating rather than seeking a way to engage the AIIB in a constructive way, or even offering alternatives for addressing the region’s infrastructure gap.

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14 AIIB’s Jin Says China-led Bank Isn’t Source of Tension With U.S. (n.d.). Retrieved from <http://www.bloomberg.com/news/articles/2016-03-25/a-i-i-b-s-jin-says-china-led-bank-isn-t-source-of-tension-with-u-s>

Washington has repeatedly stated that the United States does not aim to contain China's rise.<sup>15</sup> These policymakers have also called upon China to act as a "responsible stakeholder" for many years. At the same time, the United States has seemed to resign itself to China's efforts to evolve its own institutions outside of the existing regional architecture. Washington has failed to use multilateral organizations as a means to give China a greater stake in the existing order and to counter the argument that the U.S. seeks to contain China's growing power.

U.S. diplomats and officials in the region, who were watching the AIIB take shape, have stated that they were unable to obtain a substantial response from Washington. In the words of one analyst, the administration was "asleep at the switch." In late spring 2014, Chinese officials began enlisting founding members of the bank. It was finally then when Washington began to react. When it did react, the first instinct of international economic policymakers at the White House and the U.S. Treasury Department was to ask whether there was a way to prevent the bank from coming into existence. After it concluded that there was little that the United States would be able to do to prevent China from establishing the AIIB, Washington shifted its approach from trying to block its creation to trying to limit its influence and dissuade its wealthy, democratic allies from joining. By limiting the membership of the AIIB, Washington would be able to limit its legitimacy and chance of competing against already existing international institutions.

Central to this approach was to question China's plan for the AIIB's governance and lending standards. The Trump administration to date has not officially commented on the AIIB but indirectly has indicated he is not keen on supporting multilateral organizations. In the past, Washington directly voiced concerns that the bank would not be sufficiently transparent, particularly over its procurement decisions, and that it would not uphold high social, labor and environmental standards. U.S. officials have also expressed concerns that the AIIB is redundant given the existence of the Asian Development Bank and the

15 Bader, Jeffrey A. "Obama and China's Rise: An Insider's Account of America's Asia Strategy." Brookings Institution, 2012.

World Banks.

With regards to dissuading allies from joining, the Obama administration was initially able to convince Japan, South Korea and Australia abstain, but the ten ASEAN countries and India joined.<sup>16</sup> The latter group is countries that stand to gain the most from new infrastructure investment. Thus, even though the United States has convinced China that the AIIB needs to have higher standards, the United States was unable to pitch its response to the region's emerging economies. Both Beijing and Washington did not anticipate the positive reception from the vast majority of the international community.

## **Policy Options**

### 1. Join the AIIB and exert influence from the inside

The first policy option is to join the AIIB and exert influence in the Asia-Pacific region from within the bank. Despite the impression that Washington's response to the AIIB was mishandled, it should not be characterized as a total failure. The AIIB is gradually evolving in a manner that conforms to the U.S. government's emphasis on high standards. The pressure from the United States convinced key allies to withhold participation – and thereby the legitimacy that participation would confer – until China offered concessions on the bank's architecture.

Furthermore, the AIIB is far from trying to unseat the World Bank and the ADB. It is still trying to look to both for guidance, personnel and technical assistance. Announcements of AIIB's initial approved projects (the majority being co-funded) have also signaled the AIIB's willingness to collaborate with existing institutions. By joining the AIIB, the United States would be able to provide such guidance and assistance. In doing so, it would be able to attain influence within the bank and prevent China from using the AIIB to gain strategic influence in the region. In fact, it is already apparent that China has been receptive to criticism and eager to work with wealthy nations and

16 Harris, Tobias. "The U.S. Response to the Asian Infrastructure Investment Bank" in *Asian Infrastructure Investment Bank: China as Responsible Stakeholder?* Sasakawa Peace Foundation USA, 2015. pp. 43-52.

incumbent institutions to ensure that the AIIB performs and delivers on its stated aims. In addition to naming a former ADB vice president, Jin Liqun, as the bank's first president, the bank has looked to hire other former ADB officials and reached out to the ADB for technical assistance.

In addition, joining the AIIB would allow the United States to look more seriously to China and Asia's other emerging economies. Washington's actions would have lived up to the vision, outlined in the rebalance strategy, of U.S. leadership committed to solving regional problems. It would allow Washington to advance the U.S. strategic position in Asia.

The U.S. government's first response to China's efforts to create new institutions or write the rules in the Asia-Pacific region should not be "how do we stop this?" This is because the AIIB will not be the last time that China proposes a new institution or, more generally, a challenge to the existing international framework. When an institution such as this one is designed to address a widely acknowledged problem, the U.S. government needs to contribute to the solution rather than defending the status quo to avoid speculation that Washington is simply trying to contain China.

By joining the AIIB, the United States will be able to continue addressing the challenges and contradictions posed by the ambitious plan the bank has for Asian infrastructure development. It will be able to contribute meaningfully by helping strike a balance between the growing demand for Asian infrastructure funds and the high standards the bank has pledged to follow. By joining the AIIB at this time, the United States will be able to shape the bank to cater its own interests, such as addressing issues as China's exercise of veto power.

## 2. Reform the incumbent multilateral development banks

The rise of the AIIB has brought attention to the inadequacies of the current multilateral banks, notably the World Bank and the ADB. The U.S. can focus its efforts on reforming the current status quo of international institutions to meet the needs that the AIIB is trying to address. The U.S. and its allies should address China's grievances that China's role in international financial

institutions is incommensurate with its wealth. The U.S. cannot be surprised that emerging economies like China and India wish to create new institutions when the incumbent institutions have not shifted to reflect the new global distribution of wealth.<sup>17</sup>

Furthermore, the current practices of the ADB and the World Bank can be improved by being more efficient, allowing developing countries to have a greater voice, and increasing its efforts in providing infrastructure financing in the Asia-Pacific region. For example, the United States should lead efforts in reforming shares at the ADB or increasing the bank's support for infrastructure lending. In all, the United States has to exert political capital to ensure that the system evolves with the global economy.

In addition, even though China has successfully completed the first stage of the AIIB's establishment, many important challenges lie ahead. Ultimately, the bank will be judged by its actual performance. By effecting reforms that make the ADB and the World Bank more efficient and well-respected institutions, these existing institutions would be able to compete with the AIIB for the opportunity to fund quality infrastructure projects. Should the ADB and World Bank gain the upper hand in such competition, the AIIB would be left to fund more risky projects. Put in the terms of zero-sum thinking, the improvement of the current U.S.-led multilateral development banks may deter the AIIB from being successful in the near future. In this way, the United States government will allow Washington and its allies take the lead in writing rules for Asia while solving widely recognized problems.

### 3. Exert influence from the periphery and further dissuade allies from joining

The third policy option is to continue the current policy towards the AIIB: refrain from joining, exert influence from the outside, and dissuade allies from joining the AIIB. Upon joining the bank, the Prospective Founding Members (PFMs), including developed countries, were able to use their bargaining power to negotiate, guide and shape the bank's AOA from within and enmesh China

17 Christensen, Thomas J. "The China Challenge: Shaping the Choices of a Rising Power," Norton, 2015.



in a network of international norms and standards. Opposition and criticism from the United States and Japan also played an important role in reining in China's ambitions and advocating for its own agenda.

The negotiations establishing the AIIB exemplify how China's behavior can be influenced by the international community. Additionally, as the United States has learned through its own experiences with multilateral institutions, it is difficult to run them well. As China has already discovered with the AIIB, a genuinely multilateral institution is difficult for a single country to dominate. Hence, the United States does not have to join the AIIB or change the current system of international institutions to prevent China from exerting itself as the great power in the Asia-Pacific region.

### **Policy Recommendations**

The U.S. should take on a combination of the first and second policy options. Washington should both join the AIIB and reform the current status of the ADB and the World Bank. This is because the United States should avoid zero-sum thinking with regards to setting agendas and building multilateral institutions in Asia. In order for American values to be taken seriously in the Asia-Pacific region and to take leadership in Asia, Washington needs not only to trumpet its American values and interests, but also to listen to and to act upon the concerns of other countries in the region, especially the region's small and medium-size powers.

The U.S. is competing with China not over who gets to write the rules in the 21st century, but over whose position in the region is seen as the most legitimate and respectful of the sovereignty and national interests of all countries in the region.<sup>18</sup> Currently, China is still locked in protracted territorial disputes with the same countries it is trying to pull into its orbit through trade and investment. On the other hand, the United States continues to enjoy a considerable advantage. The U.S. is an offshore power with a long history of sustained bilateral and multilateral engagement in Asia.

18 Clinton, Hillary. "America's Pacific Century," *Foreign Policy*, October 11, 2011.

The United States must be careful not to squander this advantage by pressuring its allies and partners to choose between the United States and China. The third policy option and the current actions of the United States would be a poor choice for this reason. In addition, as the past three years since the announcement of the AIIB have shown, the United States cannot afford to take a relentlessly oppositional stance when China offers to work with others. Washington cannot assume that its Asian allies and partners will share its approach because of the sheer size of China's economy and the influence Beijing it able to exert as a result.

Therefore, the two-pronged approach is to join the AIIB and exert influence in the Asia-Pacific region from within the bank, and improve the current practices of the ADB and the World Bank by striving for greater efficiency, allowing developing countries to have a greater voice, and increasing its efforts in providing infrastructure financing in the Asia-Pacific region.

### **Obstacles & Impact**

The United States administration will likely be constrained by the U.S. Congress to join the AIIB and reform the incumbent multilateral development banks. This is because Congress is responsible for authorizing U.S. contributions to MDBs and other international financial institutions and for approving any changes to the governance and structure of MDBs. Even when China was pledging tens of billions of USD to the AIIB, the U.S. Treasury was not even able to arrange a meeting within Congress to discuss the U.S. commitments to ADB and the Asian Development Fund (ADF). In light of Congress's inability to fund existing commitments to Asian development assistance, the U.S. administration may have difficulties offering concrete proposals to join the AIIB and to reform the current system. Devising a more nuanced approach will also take a significant amount of time and energy moving forward.

The manner in which the United States has handled the situation may have also tainted its reputation in the international community. Joining the AIIB at this time may seem hypocritical if the rhetoric is not delivered

properly, especially when the United States spent much of the time during the AIIB's establishment on dissuading its allies and citing the many reasons in which an additional multilateral development bank would be redundant or counterproductive. Pledging funds at this time may raise many questions about the United States' intentions of a rebalance strategy in the region. At the end, Washington's Asia "rebalance" strategy will require subtlety moving forward as it joins the AIIB and reforms the incumbent institutions in order to meet the infrastructure demands and continue to advance the U.S. strategic position in Asia.

### **Measuring Success & Failure**

One measure of success for the United States is the amount of influence, voting power, and respect it is able to garner within the AIIB, and continue to garner within the incumbent institutions.

Secondly, by intensifying the United States' involvement in multilateral institutions within the region, success can be measured by seeing the amount of improvement in economic integration in the region. More precisely, there should be stronger import and export relations, trade agreements, and minimized trade barriers in such a way that the countries in the region continue to look upon the United States as a great economic power, trustworthy ally, and a nation with model values and interests.

Thirdly, the policy actions would be considered a success if there is no, or at least minimal, diplomatic backlash from China for Washington's desire to exert influence within the AIIB and to reform the incumbent multilateral development banks.

In the end, we are witnessing the emergence of an era in which Asia is governed by overlapping clusters of institutions. This era is marked by a state in which some institutions are led by the United States and its allies, some by China, and some by others such as the Association of Southeast Asian Nations (ASEAN). These policy actions are aimed at resolving existing and potential disputes and at promoting regional integration in the Asia-Pacific region in light of rising powers like China, while at the same time for the United States to attempt to retain its hegemony in the region.

### **About the Author**

Lisa Xiao is a senior at the Johns Hopkins University, majoring in International Studies with a concentration in East Asian Studies. She is a Woodrow Wilson Research Fellow, the most prestigious and competitive undergraduate research fellowship at Johns Hopkins University. During her sophomore year, she received early admission to the M.A. program at the Paul H. Nitze School of Advanced International Studies (SAIS) in Washington, D.C.. Having previously lived in four countries, she is fluent in Mandarin, French, Cantonese, and English.

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# The Role of Hate in Attitudes Towards Civility and Violence Among Protestors

Katherine E. Ruehrdanz

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Emotions have received insufficient attention from scholars investigating political violence and civility in politics. In this paper, I examine how hate influences attitudes towards civility and political violence among American protestors. To that end, I use survey data collected at multiple protests in 2016 and 2017. I found that hate towards politics leads people to reject the idea that civility is necessary in protest. People with hate towards politics tend to believe that violence can be necessary to influence policymakers.

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**O**n a late September evening in Thousand Oaks, California, someone broke a window of the local Planned Parenthood, poured in gasoline, and set the building on fire (Rocha and Mejia 2015). Fortunately, the clinic was empty and no one was injured (Rocha 2015). Unfortunately, it was not an isolated incident; all across America, health care centers that provide abortion experience threats, harassment, and violence (National Abortion Federation 2016). On the other side of the country, crowds of pro-life activists come to Washington, D.C. for the March for Life every year (Peters et al. 2017). The event features speakers, signs, and chants. Countless such pro-life demonstrations occur in cities across the United States each year, with similar signs and civility. This all begs the question: why do some pro-life people use violence and intimidation tactics against health clinics while others channel their energy into coordinating marches or contacting their elected officials? Why do some believe they can create change by marching in the capital while others believe in the power of setting buildings on fire?

Despite the occasional violence, attempts to influence government are a critical part of democracy. Activists may choose their tactics by looking at costs, perceived probability of success, the choices of other activists, among other considerations (Blee 2013; Muller and Weede 1990; Wang and Soule 2012).

The efficacy of civility and violence as tactics to influence politics continues to be a subject of scholarly investigation. John (2006) and Paps (2003) write about the efficacy of riots and terrorism to generate political change, while Stephan and Chenoweth (2008) conclude that nonviolence is more successful than violence as a way to extract concessions from the powerful.

Protestors merit research as a unique population. Their mere presence at a protest indicates an above-average level of engagement with politics. It is possible that protestors conceptualize politics in different ways than the general population. In any case, there has been continued public discussion and concern about the alleged violence of protestors (Starnes 2016; Bump 2017). I hope that careful study can lead to a more accurate understanding and a more productive public discourse about the intersection of protestors, civility, and violence.

Political violence is a strictly goal-seeking activity, according to conventional wisdom (Bearman and Latin 2008; Walter 2009; Muller et al. 1991). However, by examining how emotions influence attitudes towards political violence, recent scholars have challenged that conventional wisdom (Jiménez-Moya et al. 2015; Moskalenko and McCauley 2009; Valentino et al. 2011). After all, it has already been established that emotions can influence attitudes and beliefs (Frijda and Mesquita 2000). Some studies found a relationship between hate and attitudes towards political violence; however, most of that research was done on populations outside the United States (Halperin 2008; Shuman et al. 2016; Tausch et al. 2011). This research expands on that body of work by studying Americans' attitudes towards civility and political violence as they relate to emotions, particularly hate. Specifically, this paper examines how hate towards politics influences beliefs about the necessity of civility or political violence in order for protest to influence the actions of policymakers. To that end, I use survey data from people at protests in the United States during 2016 and 2017. I find that hate towards politics is positively correlated with belief in the need for violence and/or property damage in protest.



## **Efficacy**

People who perceive that peaceful, legal, rule-following activism can reach their political goals tend to participate in such activism (Shuman et al. 2016). In other words, people participate in activism when they believe their efforts will work. On the other hand, low perceived efficacy of legal activism leads to support for political violence (Tausch et al. 2011; Wright et al. 1990; Shuman et al. 2016). This evidence supports the commonly-held idea that activists begin to support the use of violence when they believe that conventional tactics are ineffective. Recent research has challenged that idea.

According to Saab and his coauthors (2016), support for political violence depends on the perceived efficacy of violent tactics, and does not depend on the perceived efficacy of rule-following tactics. When political violence is perceived as effective, people support it and are willing to engage in it, regardless of the perceived efficacy of peaceful activism (Saab et al. 2016). Similarly, Moskaleiko and McCauley (2009) found that the path to committing violence might not include past activism. They suggest that supporting political violence requires a different appraisal of the political situation and that violence “is not a more extreme form of activism” (Moskaleiko and McCauley 2009). So, the perceived inefficacy of legal activism may or may not be a significant factor in the conception of one’s support for political violence; there are other paths to arrive at support for political violence. Thus, there is a need for investigation into those other paths. What determines attitudes towards civility and violence in politics?

## **Hate**

Robert Sternberg (2003) theorizes that hate has three components: a psychological distancing due to repulsion or disgust; intensity in the form of anger and/or fear; and contempt through devaluation and dehumanization of the object of hate. Likewise, hate is related to moral exclusion, which occurs when a person believes that the object of hatred is not worthy of, or subject to, moral consideration (Tausch et al. 2011). Haters often exhibit cognitive

distortions such as dichotomous reasoning, greater-than-normal negativity bias, and over-generalization, which may manifest as characterizing an entire group based on only a few people (Beck and Pretzer 2005). Eran Halperin distinguishes between chronic hate, an ongoing emotional disposition towards something or someone, and immediate hate, which is formed in response to a significant event (Halperin et al. 2012). What we call “hate” usually refers to what Halperin terms “chronic hate.” This chronic hate is very closely related to contempt. In fact, contempt and hate are so closely intertwined that research on contempt and research on hate can be applied to one another (Shuman et al. 2016).

The relationship between hate and violence follows from the characteristics of hate. Hatred often provides a justification for violence (Baumeister and Butz 2005). Through moral exclusion, people who generally denounce violence can justify its use against a certain target. Furthermore, hate is related to the belief that the object of hate has an unchangeable evil nature (Halperin 2008). If something is inherently bad, then changing or reforming it is not possible. In that case, violence is a more justifiable option, and may be seen as the only effective way to deal with conflict or to successfully interact with the object of hate (Shuman et al. 2016; Halperin 2011).

### Hate and Anger

Consider hate and anger in an interpersonal context. When faced with the misbehavior of another individual, people tend to feel anger if the transgressor is a friend or someone who they think they can influence (Fisher and Roseman 2007). That anger motivates them to attempt to change the other person’s behavior and/or make changes or improvements to their relationship (Fisher and Roseman 2007). Alternatively, people tend to feel hate if the transgressor is a stranger, someone who they think they cannot influence, or someone who they believe is bad by nature and, therefore, cannot be changed (Fisher and Roseman 2007). Hate makes people give up concern for maintaining a positive relationship with the hated person (Tausch et al. 2011). Both hate and anger are

somewhat hostile feelings, but haters' feelings of hostility are not constrained by a desire to preserve relationships (Tausch et al. 2011). Haters are willing to violate norms of reciprocity and harm the hated person (Baumeister and Butz 2005).

This same process can occur when the relevant object is an outgroup, rather than an individual, who has committed an unjust act against one's ingroup. The belief that the outgroup can change leads to anger and a desire to reform or improve the outgroup (Halperin 2008). The belief that the outgroup cannot be changed leads to hatred and a willingness to support or commit violence against the outgroup (Halperin 2008). This relationship is moderated by one's level of identification with the ingroup, though it remains unclear exactly how that moderation works. Only in people strongly identified with the harmed ingroup does hate lead to willingness to commit violence, accordingly to research by Shuman and his coauthors (2016). Alternatively, people with less in-group identification may be more willing to support illegal tactics, because they are less concerned with the group's reputation than those with greater in-group identification (Jiménez-Moya et al. 2015).

In the context of politics, anger leads to greater participation in politics and activism through peaceful, legal means such as attending protests or rallies, volunteering on a campaign, and voting (Valentino et al. 2011). Hate stifles support for political compromise (Halperin 2011). Moreover, hatred leads to support for and/or willingness to participate in violence or actions which break the rules (Tausch et al. 2011). That effect may be due to hate increasing the perceived efficacy of political violence, or it may be for another reason; this remains unexplored.

Hate is destructive to relationships. I theorize that hate towards politics as a whole can function in the same ways as hate towards an individual or a group. Hate leads to a willingness to disregard norms of conduct (Tausch et al. 2011). Therefore, I expect that haters will disregard the need for civility in protest.

*Hypothesis A: People for whom politics evokes hatred are less likely to believe that civility is necessary to protest to influence the actions of policymakers.*

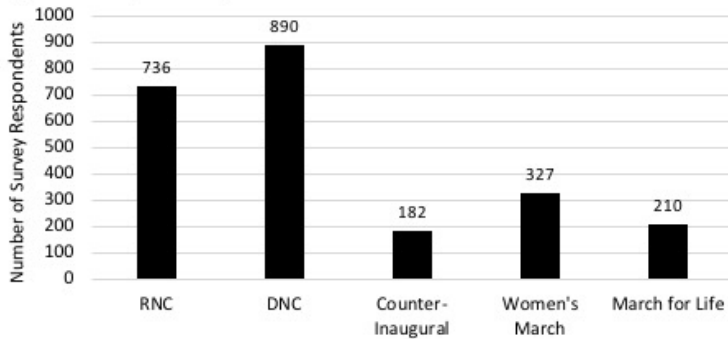
Hate has a close relationship with violence. I expect that hate not only influences the perceived efficacy of political violence but, in fact, leads people to believe that violence may be necessary to reach their political goals.

*Hypothesis B: People for whom politics evokes hatred are more likely to believe that violence and/or property damage are necessary to protest to influence the actions of policymakers.*

## **Methods**

### Survey Design

This study is based on surveys taken at protests in July 2016 and January 2017. Surveys were taken at the following five places: (1) protests outside the 2016 Republican National Convention in Cleveland, Ohio; (2) protests outside the 2016 Democratic National Convention in Philadelphia, Pennsylvania; (3) counter-inaugural protests in Washington, D.C. on January 20th; (4) the Women's March on Washington in Washington, D.C. on January 21st; and (5) the March for Life in Washington, D.C. on January 27th. The dataset contains 2,345 responses to the survey. The number of responses gathered from each of those five events is described in Figure 1. The six-page, pen-and-paper survey asks about political opinions, reasons for involvement in protest, political ideology and affiliations, involvement with political organizations, emotions towards politics, as well as demographic information such as age, gender, and income. Participation was voluntary and respondents did not receive compensation. It was also anonymous; respondents were not asked to provide their name or other personal identifiers.

**Figure 1. Sample Size by Event**

In order to collect a representative sample of the crowd at a protest, a team of research assistants used the anchor sampling method developed by Heaney and Rojas (2015). The anchor sampling method works as follows. The surveyors at an event spread out, with each starting in a different area. The surveyor arbitrarily chooses one individual in the crowd as an anchor. The anchor is not asked to take a survey, as it is possible the anchor was chosen with some bias. The surveyor counts five people to the right of the anchor and asks that person to fill out a survey. Regardless of whether they accept or refuse, the surveyor then counts five people to the right of that individual, and asks that person to fill out a survey. The surveyor continues on like so until three surveys have been planted. Subsequently, the surveyor selects a new anchor and starts the process over again. The anchor sampling method largely eliminates selection bias; while there is likely to be bias in the selection of the anchor, there is not bias in the selection of individuals offered a survey. This method produces a sample that is reasonably representative of the people in a crowd.

When someone declined to take the survey, surveyors recorded their best estimate of that person's race and gender. We used these counts to weight our data in order to account for nonresponse bias by race and gender. While this method does inevitably carry inaccuracies, it is a pragmatic way to deal with this methodological issue so that our results can be more representative of the people assembled at the events in question. Additionally, respondents were free

to decline to answer any question or to stop filling out the survey at any point. In order to account for missing data, imputation was used on the variables in my regressions.

Most of the survey questions are multiple choice, and many of those choices are ordinal, such as amount of agreement or disagreement, how often they do something, amount of approval, or how important something is to them. Subjective assessments like these are subject to anchoring bias, because people generally read the top option first (Strack and Mussweiler 1997). In order to limit those effects, we created two versions of the survey, which have the same questions, but with the multiple-choice options listed in the opposite order. Furthermore, with so many questions about politics, it is possible that reading and responding to one question may influence how people respond to questions placed later in the survey (Vriens et al. 2017). For that reason, we created two more versions of the survey by rearranging the order of the questions. This resulted in four versions of the same survey, which were distributed in equal amounts during data collection. In order to reduce stereotype threat, demographic questions were always on the last page, in order to reduce stereotype threat (Steele 2011).

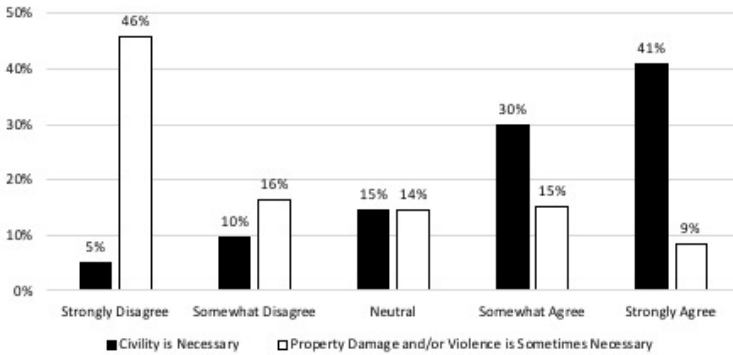
### Independent and Dependent Variables

In order to assess emotions with respect to politics, the survey asked, “These days, how often does politics make you feel?” followed by a few emotions. Survey respondents rated whether they felt that emotion almost always, often, sometimes, rarely, or never. Later in this paper, I sometimes use the term “political haters” in reference to the people for whom politics evokes hate.

As discussed in the hypotheses, the two dependent variables are the belief in the necessity of civility for protest to influence policymakers, and the belief in the necessity of violence and/or property damage for protest to influence policymakers. Later in this paper, I refer to these variables in shortened ways, primarily as “belief in the necessity of violence/civility,” however I am referring to these same concepts. These variables are assessed through survey responses

to a five-point Likert scale of agreement and disagreement with the following statements: “civility by the participants in a protest is necessary in order for protest to influence the actions of policymakers” and “property damage and/or violence are sometimes necessary in order for protest to influence the actions of policymakers.” The people’s responses to these questions are graphed in Figure 2. A majority of people surveyed believe in the need for civility and do not believe in the necessity of violence and/or property damage.

**Figure 2. Opinions on the Necessity of Civility and Violence in Protest**



There is a slight difference in those two questions in the form of the word “sometimes”: one states that civility is necessary, whereas the other states violence and/or property damage is sometimes necessary. This does place some limitations on my results and appropriate interpretations of them. Since these variables are not perfectly equivalent, it may not be appropriate to make the stark comparison between the two. Despite this discrepancy, these data remain useful. Examination of these can still lead to valuable insights about how people regard civility and political violence.

### Regression Models

In order to create a model, I used two ordered probit regressions. An ordered probit regression is appropriate in this case because the dependent variables are in the form of discrete, ordinal data. Model One looks at belief in the need for civility. Model Two looks at belief in the need for violence and/or property

damage. Both models include the same control variables.

**Table 1: Models of Civility and Violence**

Independent Variable	Model 1: Civility	Model 2: Violence	Mean (SD)	Percent Imputed
	Coefficient (Standard error)			
<i>Hate</i>	-0.079 ** (0.029)	0.102 *** (0.031)	2.481 (1.223)	28.85%
<i>Anger</i>	0.045 (0.036)	0.100 * (0.044)	3.797 (1.095)	52.19%
<i>Enthusiasm</i>	0.070 * (0.036)	-0.040 (0.040)	3.071 (1.121)	26.93%
<i>Hope</i>	0.025 (0.043)	0.034 (0.050)	2.925 (1.052)	53.62%
<i>Strength of Partisan Attachment</i>	0.102 *** (0.024)	-0.083 *** (0.026)	1.220 (1.220)	11.36%
<i>Liberal Ideology</i>	-0.081 *** (0.017)	0.108 *** (0.021)	6.854 (2.374)	27.91%
<i>Ideology other than Liberal or Conservative</i>	-0.213 * (0.099)	0.284 ** (0.099)	0.106 (0.309)	19.74%
<i>Membership in a Political Organization</i>	-0.087 (0.057)	0.127 * (0.060)	0.457 (0.498)	11.93%
<i>Female</i>	0.169 ** (0.060)	-0.246 *** (0.064)	0.459 (0.498)	20.84%
<i>Age</i>	0.003 (0.002)	-0.012 *** (0.002)	38.985 (16.280)	20.23%
<i>Level of Education</i>	-0.040 (0.023)	-0.023 (0.024)	4.180 (1.435)	18.51%
<i>Income</i>	0.001 ** (0.000)	-0.001 (0.000)	3.518 (2.112)	23.13%
<i>Frequency of Attending Religious Services</i>	-0.006 (0.023)	0.043 (0.025)	2.130 (1.439)	18.35%
<i>Conservative Event</i>	0.253 (0.134)	-0.635*** (0.146)		
<i>DNC</i>	0.106 *** (0.098 )	-0.497 *** (0.146)		
<i>RNC</i>	0.147 (0.105)	-0.280** (0.095)		
<i>Women's March</i>	0.419 *** (0.105)	-0.592*** (0.101)		
<i>March For Life</i>	0.438 * (0.198)	-0.238 (0.214)		
<i>Form 1</i>	0.091 (0.0528)	0.015 (0.055)		
Cut point 1	-1.494 (0.244)	-0.090 (0.244)		
Cut point 2	-0.855 (0.243)	0.385 (0.243)		
Cut point 3	-0.3167 (0.244)	0.876 (0.244)		
Cut point 4	-0.512 (0.245)	1.623 (0.245)		
N	2,041	2,041		
F	9.35 ***	16.76 ***		
df	2,044	2,036		

\*\*\*  $p \leq 0.001$ , \*\*  $p \leq 0.01$ , \*  $p \leq 0.05$

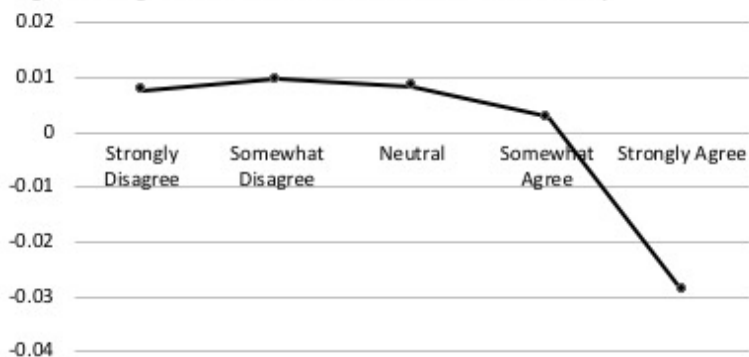
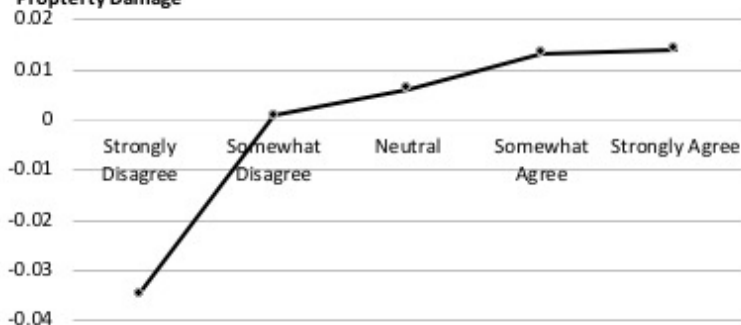
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## Results

Table 1 displays my regression results. The results of Model 1 are consistent with Hypothesis A. There is a negative correlation between hate and belief in the necessity of civility. This correlation carries a p-value of 0.006. Haters are less likely to believe in the need for civility. The results of Model 2 support Hypothesis B. Haters are more likely to believe in the need for violence and/or property damage. These results hold constant the following control variables: strength of identification with a main political party, membership in a political organization, gender, age, education, income, religious engagement, the event at which the individual was surveyed, and ideology as liberal, conservative, or other.

An examination of the marginal effects of hate, see Figures 3 and 4, reveals the following about the relationship between hate towards politics and opinions about civility and violence. With respect to the need for civility in protest, haters tend to towards disagreement or neutrality. Haters are much less likely to strongly believe in the need for civility in protest. When considering the proposition that violence and/or property damage is necessary in protest, haters tend to either agree or be neutral, though they are more likely to agree than being neutral. And haters definitely do not eschew the possibility that violence and/or property damage may be necessary for the efficacy of protest. This is robust evidence in support of my hypotheses. Haters tend to agree with its necessity for the efficacy of protest. Haters are less likely to agree with the need for civility in protest.

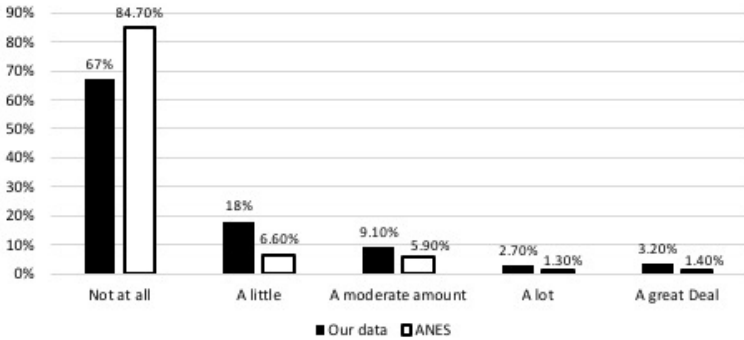
**Figure 3. Marginal Effects of Hate on Belief in the Need for Civility****Figure 4. Marginal Effects of Hate on Belief in Necessity of Violence and/or Property Damage**

### Protestors as a Unique Population

These data were taken from a sample of people at protests. By design, my results are not representative of the general U.S. population; a nonrandom selection effect regulates who decides to attend a protest. Therefore, great care should be taken when considering how this research applies to different populations. In any case, this population merits investigation; there are differences between protestors and the general population specifically in how they view political violence. Both our survey and the 2016 American National Election Study, which surveys eligible American voters, asked how much the surveyed person feels that political violence is justified in American politics today (ANES 2017). Figure 3 displays the results. The surveyed protestors are a

bit more accepting of political violence than the general population of eligible American voters. For this reason, it is worthwhile to investigate what factors influence their beliefs about political violence.

**Figure 5: Opinions on How Much Political Violence is Justified**



## Discussion

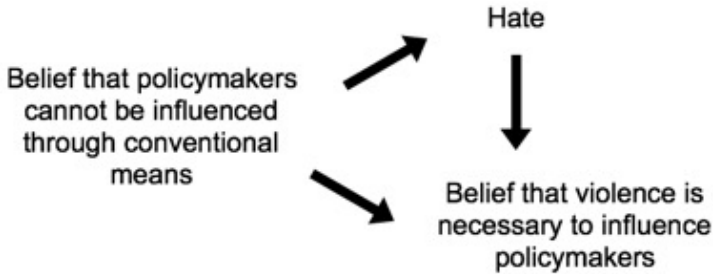
### Hate

My statistical analyses support Hypothesis B; hate leads to the belief that violence and/or property damage are sometimes necessary to protest to influence the actions of policymakers. This finding was expected, given the properties of hate. Hate causes a number of cognitive distortions which may influence one's appraisals (Beck and Pretzer 2005; Beck 1999). These distortions include over-generalization, which may manifest as a hater's belief that all policymakers are bad or corrupt (Beck and Pretzer 2005; Beck 1999). Hate also leads to dichotomous reasoning, also known as all-or-nothing thinking, which causes people to think in extreme terms, without any gray area (Beck 1999). Consequently, political haters may not only believe that violence is an effective means to influence policymakers, but also believe that violence is in, in fact, necessary to influence policymakers.

The belief that violence and/or property damage is necessary to influence policymakers may also require, at least to some extent, a judgment that political violence is justified. Haters dehumanize the object of hate, and come to view it as unworthy of moral consideration (Sternberg 2003; Tausch et al. 2011). In

this way, policymakers can become an “other” in the minds of haters, which further reduces the level of nuance in their thinking (Halperin et al. 2012). Similarly, haters lack empathy or altruism towards the object of their hate (Halperin 2008). These provide justification for violence, which may contribute to haters’ belief that violence and/or property damage is necessary in protest.

Still, the most accurate understanding of this relationship may include a confounding variable. My dependent variable is one’s level of agreement or disagreement with the statement “violence and/or property damage is necessary to protest to influence policymakers”. The assertion that violence is necessary implies, at least to some extent, that nonviolent tactics are ineffective, or at least less effective than violent tactics. So, a person’s assessment of the necessity of violence in protest hinges on both that person’s perceived efficacy of political violence and their perceived efficacy of nonviolence. Prior research has shown that a low perceived efficacy of nonviolence can lead to support for or willingness to engage in political violence (Tausch et al. 2011; Wright et al. 1990; Shuman et al. 2016). This introduces a methodological problem, because the perceived inefficacy of nonviolent activism also leads to political hate (Shuman et al. 2016). Thus, the perceived efficacy of nonviolence is a confounding variable; this is illustrated in Figure 6. The presence of a confounding variable casts doubt onto the relationship between my independent and dependent variables. Still, I believe that their relationship is real. My proposed mechanism is sound and based in research on the properties of hate. The correlation I found is statistically significant with a very low p-value. Nevertheless, I strongly recommend further research to investigate the exact relationships among these variables.

**Figure 6: The Possible Confounding Variable**

I also found support for Hypothesis A; hate leads to a rejection of the necessity of civility in protest. The mechanisms here are the same as those to the relationship between hate and political violence, but in the opposite direction. Civility in protest requires adhering to rules and norms. Haters tend to disregard norms and rules, at least with respect to the object of their hate (Tausch et al. 2011). Similarly, the use of civility indicates some concern for the preservation of relationships, whereas haters often disregard their relationship with the object of hate (Fischer and Roseman 2007). I suspect that haters have less charitable opinions of policymakers, and so they are less likely to see civility as necessary to influence those policymakers. Since hate influences one's thought processes in a way that reduces nuance, it may be easier for haters to develop uncharitable attitudes towards policy makers (Beck 1999). Indeed, the negative correlation between hate and civility flows naturally from the characteristics of hate.

### Limitations

This research benefits from a sample size of over 2,000. Still, there are limitations. These data were collected during or shortly after the 2016 elections. In fact, all of the events at which we fielded surveys had some relationship to the elections. While none of my variables are directly related to the elections, it is possible that the elections have influenced people's perceptions. In particular, the nomination and subsequent election of Donald Trump as President has

had a profound effect on many people. My findings may not be applicable to other countries with different historical experiences. Replication research could examine if these relationships hold true in different times and places.

My findings may be applicable to related variables, including the perceived efficacy of violence and the justification for violence. Still, the perceived efficacy of violence, the justification for violence, and the perceived necessity of violence are not equivalent. One may believe that civility is effective in protest, but that other tactics can also influence policymakers. Such a person might respond negatively to the necessity of civility in protest. By using a Likert Scale, I do capture some of this nuance. Still, future research should investigate the web of causation among perceived efficacy of political violence, attitudes towards political violence, and hate towards politics.

Furthermore, activism and protest are not always directed towards policymakers. For example, animal rights activists often pressure businesses to change their practices. I specifically examined attempts to influence policy makers. I suspect that my findings will hold true in those other contexts, since the mechanisms of hate would remain the same. In any case, this is a fascinating area for further investigation.

## **Conclusion**

Political haters tend to believe in the necessity of political violence and/or property damage to protest to influence the actions of policymakers. Similarly, political haters are less likely to believe that civility is necessary for protest to influence the actions of policymakers. Haters have less empathy, less nuanced thinking, and less concern for norms, rules, or relationships (Beck 1999; Tausch et al. 2011). Haters exhibit cognitive distortions and dehumanization of the object of hate, which may be policymakers as a group or politics in general (Sternberg 2003). All of these aspects of hate, contribute to haters' attitudes towards civility and violence in different ways. It is possible, though, that the perceived inefficacy of nonviolent activism is causing both political hate and the perceived necessity of violence.

By examining the role of emotions in assessments about the necessity and efficacy of political violence, I challenge conventional wisdom that political violence is solely a goal-seeking activity (Bearman and Latin 2008; Walter 2009; Muller et al. 1991). A person's attitudes towards political violence not only concern reaching a political objective, but they are influenced by emotions, namely hate towards politics. This research contributes to and has implications for not only the study of political violence but also for investigations of public opinion, partisanship, emotions in politics, and activism.

The findings presented here are not only relevant to scholars, but they have practical uses as well. They may be helpful to de-radicalization programs, which seek to either prevent those at risk from committing political violence, or treatment for those who have committed violence and are attempting to re-integrate themselves into society. These findings may also be useful to anyone creating risk assessments, and perhaps also to psychologists seeking to better understand emotions. By specifically studying protestors, I have examined a unique population with unique characteristics. While my results might not be generalizable to other populations, my main findings do generally correspond with other research in this area.

### **About the Author**

This is an abridged version of Katherine's senior thesis, which she wrote under the guidance of Professor Michael Heaney. Katherine recently completed her undergraduate degree at the University of Michigan in Ann Arbor, where she studied Organizational Studies, Economics, and Political Science. Special thanks to the Organizational Studies Program for its support of this project.

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