# A Report on "The Populist Harm to Democracy: An Empirical Assessment" by Kyle and Mounk (2018)

Reviewer 2

February 06, 2026

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isitcredible.com

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I am wiser than this person; for it is likely that neither of us knows anything fine and good, but he thinks he knows something when he does not know it, whereas I, just as I do not know, do not think I know, either. I seem, then, to be wiser than him in this small way, at least: that what I do not know, I do not think I know, either.

Plato, *The Apology of Socrates*, 21d

To err is human. All human knowledge is fallible and therefore uncertain. It follows that we must distinguish sharply between truth and certainty. That to err is human means not only that we must constantly struggle against error, but also that, even when we have taken the greatest care, we cannot be completely certain that we have not made a mistake.

Karl Popper, 'Knowledge and the Shaping of Reality'

# Overview

**Citation:** Kyle, J., & Mounk, Y. (2018). The Populist Harm to Democracy: An Empirical Assessment. *Tony Blair Institute for Global Change*.

**URL:** http://institute.global/insight/renewing-centre/populist-harm-democracy

**Abstract Summary:** This paper empirically assesses the impact of populist governments on democracy using a global database, finding that populist rule, regardless of ideology, has a highly negative effect on political systems and significantly increases the risk of democratic erosion.

**Key Methodology:** Quantitative analysis using a global database of populist leaders and parties (1990-2018), employing duration models (Cox proportional hazards) and regression analysis on Polity IV and Freedom House data.

**Research Question:** What is the effect of populist rule on a country's democratic system, specifically regarding the quality of democracy, checks and balances on executive power, and political participation?

# Summary

## Is It Credible?

This report by Kyle and Mounk for the Tony Blair Institute for Global Change sets out to empirically resolve the debate over whether populism is a corrective force for democracy or a threat to it. Drawing on a "first-of-its-kind global database" of 46 populist leaders and parties, the authors argue that populism represents a "clear and present danger to democracy" (p. 23). The report's headline claims are stark: populist governments are "four times more likely" than non-populist ones to harm democratic institutions (p. 4), they stay in office twice as long as non-populist democratically elected leaders (p. 3), and they oversee significant declines in press freedom, civil liberties, and political rights (p. 4). While the descriptive statistics presented are striking, the credibility of the causal claims is complicated by the study's definitions and research design.

A primary challenge to the report's credibility lies in the potential circularity of its central definitions. The authors define populism not just by anti-elite rhetoric, but by a "distinctive mode of political organization" that involves "bulldozing over political and civil-society institutions" (p. 8). Having defined populists in part by their tendency to dismantle institutional constraints, the finding that these leaders subsequently erode checks and balances (p. 4) and initiate what the report calls "democratic backsliding" (p. 29) borders on tautology. The study essentially confirms that leaders selected for their anti-institutional posture indeed act against institutions. This does not invalidate the correlation, but it suggests the "harm" is baked into the classification of the leaders rather than being a surprising downstream consequence of populist ideology itself.

Furthermore, while the authors use strong causal language—stating that populist rule "leads to" democratic erosion (p. 3)—the observational nature of the data makes

causality difficult to establish. The authors acknowledge that democracies electing populists may already be "less consolidated and more likely to backslide" (p. 29), and they attempt to control for this using country fixed effects and other variables. However, the magnitude of the effect is highly sensitive to model specification. For instance, in the regression analysis of democratic backsliding, the coefficient for populist rule changes dramatically depending on whether a lagged dependent variable is included (p. 30). This sensitivity suggests that distinguishing the specific impact of the leader from the underlying trajectory of the country's democratic health is fraught with difficulty. It remains plausible that populism is a symptom of democratic decay rather than its primary cause.

The report also employs interpretive frames that consistently view ambiguous data as evidence of harm. For example, the finding that populists stay in office "twice as long" as non-populists (p. 3) is presented as a warning sign. Yet, in a vacuum, longevity could simply indicate political success or popularity. Similarly, the authors argue that populists leave office in "dramatic circumstances" (p. 14), noting that many are forced to resign or are impeached (p. 4). A different interpretation might view impeachments and forced resignations as evidence of democratic resilience—proof that institutions are strong enough to remove overreaching leaders. By framing these outcomes exclusively as evidence of "populist harm," the report sidesteps the possibility that the turmoil is the sound of democracy working to correct itself.

Finally, the evidence regarding corruption is methodologically slippery. The paper claims that 40 percent of populist leaders are indicted on corruption charges (p. 4). Anticipating the counter-argument that many are *not* indicted, the authors argue that "only those populist leaders who do not erode an independent judiciary are ever charged in the first place" (p. 19). This logic creates an unfalsifiable framework: an indictment proves the populist is corrupt, while the absence of an indictment is taken to imply the populist has captured the judiciary to hide their corruption. Additionally, the reliance on expert-coded indices like Freedom House and Polity IV

introduces the risk of shared expert bias, where the same academic consensus that labels a leader "populist" may be predisposed to downgrade a country's democracy scores upon their election. Despite these limitations, the report provides a valuable descriptive profile of how leaders labeled as populist tend to govern, even if the causal arrow remains elusive.

## The Bottom Line

Kyle and Mounk successfully demonstrate a strong correlation between leaders classified as populist and subsequent declines in democratic metrics. However, the claim that populism *causes* this harm is weakened by a definition of populism that includes anti-institutional behavior, creating a circular argument where populists are identified by the very traits the study purports to discover. While the descriptive data on the longevity and turbulent exits of these leaders is compelling, the analysis likely overstates the causal impact of the leaders themselves versus the underlying instability that brought them to power.

# Potential Issues

**Circularity in the definition of populism:** The report's theoretical framework may create a circular argument by defining populism in a way that predetermines its conclusions. The authors define populism based on two claims, the second of which is that "Populists are the voice of the 'true people' of a country and nothing should stand in their way," which they elaborate involves "bulldozing over political and civil-society institutions" (p. 8). The study then empirically tests whether populists harm democracy by eroding checks and balances. This creates a potential tautology: the study finds that leaders who are defined by their anti-institutional claims do, in fact, act to remove institutional constraints. While it is not a foregone conclusion that a leader who claims to oppose constraints will succeed in dismantling them, the definition itself may filter out any potential populists who respect institutional limits, thereby baking the anti-institutional intent into the sample of leaders being studied. This makes the finding that populists are associated with institutional erosion less of a novel empirical discovery and more of a confirmation of the initial definition.

**Inability to establish causality:** The report consistently uses causal language, such as its title and the claim that "populist rule... leads to a significant risk of democratic erosion" (p. 3). However, its observational research design cannot definitively establish causation. A strong alternative explanation is that populism is a symptom of pre-existing democratic weakness, institutional fragility, or popular discontent that both leads to the election of a populist and independently contributes to democratic backsliding. The report acknowledges this limitation, stating that "The types of democracies that elect populists may be less consolidated and more likely to backslide in the first place" (p. 29). It attempts to mitigate this through statistical controls and country fixed-effects models, which is a standard approach. Nevertheless, these methods may not fully account for unobserved, time-varying factors like rising polarization or declining trust in institutions that could drive both phenomena,

meaning the strong causal claims are not fully supported by the research design.

**Exclusion of coalition partners may bias the sample:** The methodology explicitly excludes populist leaders or parties who served as "minority partners in a coalition government" (p. 25), a decision for which no justification is provided. This methodological choice may introduce selection bias by focusing only on the most dominant populist actors who are powerful enough to lead a government outright. Many populist parties first enter government in a constrained, junior role, and excluding these cases removes a crucial set of data points that could reveal how populists behave when their power is limited. This selection may inflate the measured negative effects of populism, as the sample is skewed towards cases where populists had the most unconstrained power to enact their agenda, thus limiting the generalizability of the findings.

**The "populism as corrective" hypothesis is dismissed rather than tested:** The authors acknowledge the theoretical perspective that populism can be a "necessary corrective" that makes political systems "more fully democratic" by addressing popular grievances (p. 6). However, the empirical analysis is not designed to test this hypothesis on its own terms. When considering positive democratic outcomes like political participation, the authors pivot away from direct measures like voter mobilization, arguing that interpreting them is "difficult" (p. 21). Instead, they shift the focus to whether citizens have the right to participate as measured by Freedom House scores on civil liberties and political rights. This move effectively dismisses the "corrective" thesis without testing its core claims, which often relate to increasing political engagement among marginalized groups or making policy more responsive to public opinion. By focusing exclusively on institutional health and formal rights, the study may be talking past the "corrective" hypothesis rather than providing a direct empirical test of it.

**Potential for shared expert bias in datasets:** The study's empirical approach correlates one set of expert-derived data (the authors' list of populists, compiled from aca-

demic literature) with other expert-coded indices (Polity IV, Freedom House). This creates a risk of common-method variance, where the observed correlation may reflect a shared consensus among a particular group of political observers rather than an objective relationship between populism and democratic outcomes. The report does not acknowledge this possibility. Instead, it engages in a one-sided discussion of data limitations, arguing that biases in the democracy indices mean the study likely "undercounts actual cases of democratic erosion" (p. 17) and that corruption figures are a "conservative estimate" (p. 19). This framing ignores the plausible alternative that expert coders for Polity and Freedom House may be predisposed against populist leaders and are therefore quicker to downgrade a country's democracy score after a populist is elected, which would bias the results away from the null.

**Failure to analyze the majority of populists who do not harm democracy:** The report states that "24 per cent of populist leaders who assume office in a democratic country initiate democratic backsliding" (p. 17). This implies that the majority—76% of populist leaders in the sample—do not oversee such backsliding. The report acknowledges this, stating that "most democracies that are faced with a populist government do manage to survive" (p. 23). However, the analysis focuses exclusively on the average negative effect and provides no systematic analysis of the institutional, economic, or political factors that differentiate the harmful cases from the non-harmful ones. The report notes that this question "will be the subject of a follow-up publication" (p. 23), but its absence here means the current study misses a crucial opportunity to provide insights into how democratic institutions can successfully contain populist risks, focusing entirely on the threat rather than the sources of resilience.

**The argument regarding corruption indictments is potentially unfalsifiable and the measure is confounded:** The report's use of corruption indictments as evidence of populist corruption is based on potentially flawed logic. It argues that the high

rate of indictment (40%) is evidence of corruption, but then claims that the rate for populists who are not indicted may also signal corruption, because "only those populist leaders who do not erode an independent judiciary are ever charged in the first place" (p. 19). This creates a framework where both outcomes—indictment and non-indictment—can be interpreted as evidence of corruption, making the hypothesis difficult to falsify. Furthermore, this logic reveals that the measure is confounded: an indictment requires a functioning, independent judiciary, meaning it is simultaneously a signal of (alleged) corruption by the leader and a signal of institutional strength in the country. A populist who successfully destroys the rule of law would likely never be indicted, meaning the measure is not a clean indicator of corruption itself.

**The magnitude of the core finding is sensitive to model specification:** The report's regression models are inconsistent in their use of a lagged dependent variable (LDV). The LDV is included in the first model for each outcome (e.g., Table 5, Column 1), which is appropriate for estimating the change in a score. However, the LDV is dropped from the fixed-effects models (Columns 2 and 3), a standard practice to avoid Nickell bias in dynamic panel models. While this is a defensible methodological choice, the reported effect sizes for "Populist rule" are substantially larger in the models that omit the LDV (e.g., the coefficient for populist rule on the Polity IV score is -0.153 with an LDV but -0.797 without it, p. 30). This sensitivity suggests the magnitude of the report's core finding is heavily dependent on the chosen model specification, a nuance that is not fully explored in the main text.

**The narrative on rule of law is mismatched with the weak statistical evidence:** The executive summary and main text make strong claims that populists attack the rule of law (pp. 4, 19). However, the report's own discussion of its formal statistical test for this relationship concedes that the evidence is weak. When discussing the regression results using the World Bank's rule-of-law indicator, the report states, "the size of the effect is small and not robust in all models" (p. 19), a caveat repeated in the

appendix (p. 36). While the report pivots to other descriptive metrics like corruption indictments to support its claim, there is a notable inconsistency between the strong framing in the summary and the weak, non-robust result from its primary statistical model for this variable.

**Substantive effect sizes are reported in a way that lacks transparency and is difficult to verify:** The report summarizes its regression results using relative percentage changes that are difficult to verify and may overstate their practical significance. For example, it claims "populist rule is associated with a 10 per cent drop relative to the mean democracy score" (p. 31) and a "13 per cent decrease in political rights" (p. 22). However, the mean and standard deviation for these variables are never provided, making it impossible for a reader to replicate these calculations from the regression tables. The reported coefficient for political rights (-0.085 from Table 11, p. 39) appears small relative to the scale of the variable, making the large percentage claim difficult to interpret without more information. While the authors may have used a more complex calculation, the lack of transparency makes the claims difficult to scrutinize and risks overstating the practical significance if interpreted as an annual effect.

**Claims about left-wing versus right-wing populism are based on statistically untested comparisons:** The report concludes that its data "clearly contradict the belief that left-wing populism does not pose a threat to democracy" (p. 18). This conclusion is based on a descriptive comparison showing that 38 percent of right-wing populists (5 of 13) and 33 percent of left-wing populists (5 of 15) curtailed civil liberties. The report presents no formal statistical test to show that this small five-percentage-point difference is not due to random chance, which is a significant concern given the very small sample sizes. To declare that this "clearly contradicts" a major argument places a great deal of weight on a small, statistically untested variation in the data.

**Interpretive framing of outcomes is one-sided:** The report consistently frames am-

biguous outcomes in a way that supports its thesis. For example, it presents the finding that populists stay in office longer as a key indicator of democratic harm (p. 3), and while it acknowledges in the body text that this could reflect popularity (p. 14), this nuance is lost in the summary. Similarly, it frames the fact that many populists are forced to resign or are impeached as evidence of democratic damage (p. 4), excluding the equally plausible interpretation that the impeachment or forced resignation of a leader overstepping their authority is a sign of democratic resilience, demonstrating that institutional checks and balances are working.

**Presentation and transparency issues:** Several minor issues related to presentation and transparency appear in the report and appendix. The report uses at least four different and conflicting end-dates for its analysis (2014, 2015, 2016, and 2018), making its temporal scope unclear (pp. 25, 27, 28, 32). Sample sizes also vary substantially across statistical models without explanation, ranging from 527 to over 2,100 (pp. 28, 31, 36). Finally, the report's central comparative statistic—that 23 percent of populists cause backsliding compared to 6 percent of non-populists (p. 4)—is presented without stating the total number of non-populist leaders in the sample, making the 6 percent figure difficult to contextualize without referring to the tables in the appendix. While these issues may not invalidate the findings, they represent gaps in documentation and clarity.

# Future Research

**Causal identification strategies:** Future work should move beyond standard regression models to employ quasi-experimental designs that can better isolate the causal effect of populist leadership. For example, a regression discontinuity design focusing on close elections where populists barely won or barely lost against non-populist candidates would allow researchers to compare democratic outcomes in similar countries, thereby stripping away the confounding factors of pre-existing democratic decay or voter discontent.

**Analysis of democratic resilience:** Given the finding that the majority of populist leaders (76 percent) do *not* initiate democratic backsliding (p. 17), future research should focus specifically on this group. A comparative analysis of the "survivors" versus the "backsliders" could identify the specific institutional features, opposition strategies, or economic conditions that allow democracies to withstand populist governance without eroding. This would shift the focus from diagnosing the threat to identifying actionable sources of resilience.

**Objective measurement of institutional erosion:** To mitigate the risk of shared expert bias in indices like Freedom House or Polity IV, researchers should test these hypotheses using more objective, quantifiable metrics of democratic health. This could include tracking the specific number of journalists jailed, the frequency of executive decrees used to bypass legislatures, or the number of judges replaced before their terms expired. Using hard data rather than perception-based scores would provide a more rigorous test of whether populists systematically dismantle rights and rule of law.

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