



SCALEDDEM

ScaleDem Analytical Framework: Four Dimensions for Scaling Democratic Innovations/D1.1

WP1, T1.2

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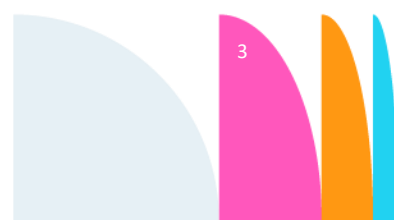


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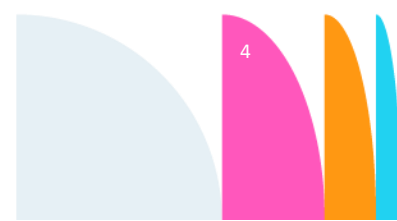
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Abstract

D1.1 is the first significant research output of the Horizon Europe ScaleDem project and represents an initial step toward inductively developing a theory of scaling democratic innovations. Building on literature in both the fields of social innovation and democratic innovation, this deliverable offers essential conceptual clarity by developing a multi-dimensional analytical framework that helps make sense of how democratic innovations can **grow beyond isolated pilots to achieve broader and more lasting impact**. It first unpacks four core scaling directions: embedding into formal institutions (Scaling High), expanding across people and places (Scaling Out), shaping civic culture and values (Scaling Deep), and enhancing process quality (Scaling In). It then identifies common barriers to scaling and organises enabling conditions across macro (institutional and political), meso (innovation-specific), and micro (actor-related) levels that may support overcoming these obstacles. Finally, it examines how these different scaling dimensions can interact, reinforce, or sometimes constrain each other through feedback loops.

Importantly, this framework does not seek to establish causal laws or offer a universal formula for success. Instead, it serves as an analytical scaffold to structure observations, clarify key concepts, and support more realistic, adaptable strategies for scaling democratic innovations in diverse contexts. By laying this foundation, D1.1 sets the stage for the next phases of the project, including developing a Theory of Change and conducting **comparative empirical research, notably using QCA**. It ultimately aims to assist researchers, practitioners, and policymakers in assessing scaling pathways and thinking more strategically about how democratic innovations can achieve wider and more durable impact.

Dimensionality of Scaling: Conceptual Gaps and Emerging Questions

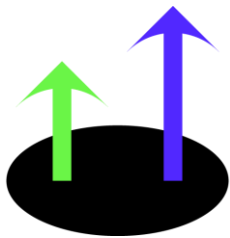
As democratic innovations have proliferated in Europe and beyond, attention has shifted from experimenting with new formats toward understanding how these practices do not remain confined to isolated pilot projects but instead can achieve broader and more lasting impact at the core of the democratic fabric. In this context, the challenge of scaling becomes more and more prominent. While the difficulty of enlarging the demos and direct democratic practices to larger and larger polities was thought to be the main challenge to democracy-beyond-the-polis by the philosophers of Antiquity, the concept of scaling remains a relatively new concept in the contemporary literature on democratic innovations (Dahl, 1989). Other fields, however, have long developed nuanced frameworks that help unpack its multiple dimensions.

In social innovation studies, Moore et al. (2015) distinguish between “scaling out”, which entails replicating or spreading innovations to reach wider populations or geographies; “scaling up”, which involves embedding innovations into broader institutional or policy systems to achieve systemic change; and “scaling deep”, which seeks to transform cultural values and relationships to sustain long-term impacts. Westley et al. (2014) similarly highlight that scaling can take varied configurations, beyond simple replication, requiring strategic engagement with complex systems to secure enduring influence. In the domain of sustainability transitions, Augenstein et al. (2020) discuss the inherent dilemmas in moving sustainable alternatives from protected niches to the mainstream, cautioning that “upscaling” often involves compromises between transformative aims and integration into dominant regimes. Bauwens et al. (2022) extend this reasoning by examining how community enterprises navigate institutional complexity when upscaling, emphasizing that expansion frequently necessitates shifts in governance structures and legitimacy to reach broader user groups. Collectively, this body of work underscores that scaling is neither linear nor purely quantitative: it spans institutional embedding, geographic diffusion, and cultural shifts.

By contrast, the concept of scaling in the field of democratic innovations has so far received only fragmented attention. Scholars have long explored how democratic innovations (DIs) can grow and achieve *broader significance*, emphasizing various dimensions such as integrating participatory mechanisms for wider coverage and more robust engagement (Spada & Allegretti, 2017), fostering diffusion and uptake across levels of government (Smith, 2019), enhancing the geographical expansion, sustainability, and reach of participatory formats (Pradeau, 2021), or amplify participants’ attitudes, behaviours, and capabilities (Theuwis et al., 2025). In this respect, it is also important to clarify that scaling is not synonymous with *impact*, for which a large body of literature already exists (Jacquet, et al., 2023). Niemeyer (2014) provides one of the earliest systematic discussions on scaling by exploring how deliberative mini publics might scale up to influence mass publics within a deliberative system. Yet his focus remains primarily on informational flows and institutional linkages of deliberative mini publics, rather than offering a comprehensive multi-dimensional framework for scaling participatory processes more broadly. An earlier attempt made by Vergne (2013) differentiates between six dimensions of scaling (numbers, territories, time, impact, quality, institutionalization). More recently, Arantzazulab (2023) has stressed the need for designing democratic experiments that can inspire replication and institutional adoption, but without

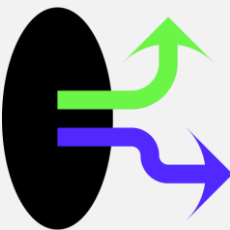
elaborating scaling as a structured concept. A broad literature also addresses the question of scaling through digital tools. A first wave concentrated around the concept of “civic tech” and digital democracy, while an emerging literature is now examining scaling largely in the context of artificial intelligence as a means to expand or accelerate citizen deliberation (McKinney, 2024, 2025; McKinney and Chwalisz, 2025). However, these discussions often remain focused on the technological leverage for scaling, leaving broader questions around embeddedness or culture largely unaddressed.

As such, there is still no consolidated framework to guide how democratic innovations can systematically scale. This deliverable addresses this gap by proposing a multi-dimensional analytical framework to better capture the complexity of scaling DIs. Rather than assuming a single path or predictable outcome, we understand scaling as a dynamic, context-dependent process, shaped by institutional arrangements, cultural and political support, the design of innovations themselves, and the strategies of diverse actors who drive (or hinder) change. Building on insights from both previous research and practitioner experience, our aim is to offer a structured yet flexible lens through which to examine how scaling unfolds along four core scaling dimensions:



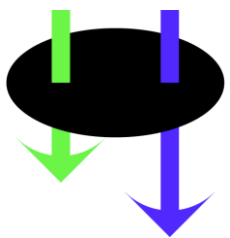
Scaling High

Embedding the innovation into formal institutions—gaining traction in laws, policies, or administrative procedures



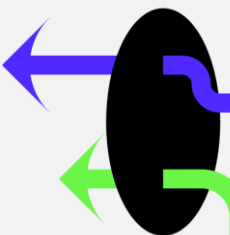
Scaling Out

Reaching more people and places by replicating the innovation across different settings or increasing the number of participants involved.



Scaling Deep

Shaping attitudes, values, and civic identities—fostering emotional and normative attachment to democratic participation.

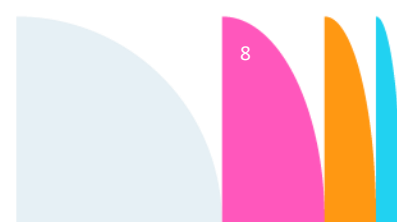


Scaling In

Strengthening the internal quality of participation—ensuring processes are more and more fair, inclusive, and deliberative.

These dimensions are deliberately framed using spatial signifiers to convey the direction and process of change inherent in scaling. Scaling describes how a democratic innovation evolves, expands, or embeds itself more deeply within a system, moving from one state to another. This is distinct from impact, which refers to the outcomes or results of an intervention at a specific point in time. While successful scaling can certainly enhance or multiply impact, the two are conceptually different: put simply, impact is static, scaling is moving. This raises important questions about the nature of scaling itself. Is it a process that unfolds autonomously, as if democratic innovations evolve like independent entities? Or is it a socially and politically driven process, actively constructed and carried forward by different actors who may vary depending on the dimension? How do these dimensions interact and influence one another? Exploring these questions is crucial for understanding scaling as more than an organic trajectory, but as a complex, actor-driven evolution shaped by varied contexts.

This working paper is intentionally positioned as a starting point. It does not present a comprehensive theory of scaling, nor does it seek to define concrete indicators or prescribe specific research designs. Instead, it offers an analytical anchor to clarify key concepts, outline initial operational definitions, and establish relevant levels of analysis. The goal is both analytical and practical: to provide a foundation that can help researchers, practitioners, and policymakers assess how democratic innovations scale, identify barriers and enabling factors, and think more strategically about where and how scaling might occur. Ultimately, this paper aims to stimulate reflection and dialogue within the broader community, inviting critical engagement that will inform and refine subsequent phases of the ScaleDem project.



1. Unpacking Scaling: definitions and potential indicators

1.1. Scaling High: Institutional Embedding and Political Uptake

Scaling High refers to the capacity of democratic innovations to integrate formal political institutions, laws, and policy-making processes. While previous studies used this expression to indicate DIs movement across territorial levels of governance (for example, from local to national) (Pogrebinschi & Ryan, 2018), we think it provides an effective spatial metaphor capturing more broadly DIs institutional ascent, that is, when innovations become recognized, embedded or mandated by public authorities at any level.

A core element of Scaling High is **institutional embedding**, which signals democratic innovations are not one-off experiments but are rather consolidated within ongoing governance. This includes budgetary stability, such as regular funding lines rather than ad hoc grants, as well as administrative anchoring in the form of permanent teams, secretariats, or dedicated civil servants embedded within public institutions. Crucially, institutional embedding also consists of functional integration, i.e., the extent to which participatory processes are connected to official decision-making bodies, such as legislative committees, planning departments, or executive branches, through formal workflows or designated review channels. All these structures signal the consolidation of participatory practices within the institutional and bureaucratic machinery.

Equally vital is **policy uptake and integration**. This refers to the degree to which outputs from democratic innovations, such as recommendations or priorities, are reflected in actual policies, regulations, laws, or strategic decisions. Tangible uptake signals that participation has substantive weight, not just procedural value.

The third dimension of Scaling High involves **legal embedding**. This occurs when democratic innovations are formally recognized and integrated into statutory frameworks, whether through legislation, regulations, or constitutional provisions. Legal embedding gives democratic innovations formal legitimacy and institutional permanence, ensuring they are not just optional add-ons. In some contexts, this includes mandated follow-up mechanisms: procedural obligations for public authorities to respond to citizens' recommendations, explain their decisions, or engage in formal debate. These requirements help close the feedback loop between citizens and institutions, transforming participation into influence.

We propose below a summary table outlining the internal dimensions and sub-components of the Scaling High concept. As with the other scaling dimensions presented in this framework, this conceptual and analytical mapping is intended to facilitate the future operationalization of these concepts into concrete indicators for empirical research. This step, however, lies beyond the scope and objectives of the present document, which aims primarily to provide a structured analytical foundation for the next phases of the project.

Table 1. Scaling High: Sub-Dimensions and Key Components

Sub-dimension	Main Component(s)
Institutional Embedding	<ul style="list-style-type: none"> • Growing budgetary and/or funding stability • Stronger and stronger Administrative and logistical anchoring • Procedural and organizational integration
Political Embedding	<ul style="list-style-type: none"> • Policy uptake and implementation
Legal Embedding	<ul style="list-style-type: none"> • Increasing legal or constitutional recognition • Higher number of mandated follow-up or implementation mechanisms

1.2. Scaling Out: Expanding Democratic Innovations Across People and Places

Scaling Out is perhaps the most easily grasped dimension of scaling. It refers to how democratic innovations expand in three directions, ‘horizontally’ (expanding across new places, institutions and kind of institutions, and/or policy domains), ‘vertically’ (across level of governance) and ‘transversally’ (extending the scope of participants towards including more and new participants).

The first aspect of Scaling Out centres around the kind of institutions activating DI and for what. An innovation might begin in one city or municipality, and later be adapted or adopted in other towns, regions, or countries. This **horizontal scaling** demonstrates that an idea or method can travel beyond its original home, responding to the needs of different communities. Replication also takes the form of thematic or sectoral spread: for instance, a DI used in environmental policy might later be applied in education or public health. Finally, horizontal scaling can concern the spread to other types of institutions: From public authorities to companies / civil society organizations or the contrary: From management technique within companies to public authorities.

The second direction is **vertical**, across levels of governance. An innovation implemented at the local level may later be adopted on the regional or national scale. DIs deployed at global and/or international level may set the scene for national/regional/ local replications.

The third direction of scaling out is **transversal** and refers to an increasing number of citizens directly involved in a single democratic innovation. When these innovations include more participants over time, or reach a higher percentage of eligible or affected populations, they are expanding their footprint in a meaningful way. However, numbers alone do not tell the full story. Who participates matters just as much. For this reason, attention to the *diversity* of participation is key: The *diversity* of participation is also key: are young people involved? Are people with lower incomes, minority backgrounds, or different education levels present? Importantly, are gender backgrounds equally present, selected, and given the opportunity to participate in DIs? And beyond people, are non-human, future generations included as well? All these questions help assess whether the innovation is reaching not only more people, but also a more diverse cross-section of society.

Table 2. Scaling Out: Sub-Dimensions and Main Components

Sub-Dimension	Main Component(s)
Horizontal	<ul style="list-style-type: none"> • Replication across institutions • Diversification of institutional types (public, hybrid, civic led) • Variation across policy domains or issue areas
Vertical	<ul style="list-style-type: none"> • Uptake of the DI across levels of governance (local, regional, national, supranational)
Transversal	<ul style="list-style-type: none"> • Increasing number of participants • Increasing diversity of participants

1.3. Scaling Deep: Civic Culture and Emotional Engagement

Scaling Deep refers to the impact of democratic innovations not in terms of how far they spread, but in how deeply they shape people's values, beliefs, attitudes, and civic identities. Rather than focusing on numbers, reach, or institutional influence, this dimension asks a different question: *How do democratic innovations get internalized deep into people's beliefs and behaviours?* At the heart of Scaling Deep is the idea of '**internalisation**', the extent to which exposure to democratic innovation processes helps individuals embrace democratic norms and develop stronger emotional and cognitive ties to democracy deep inside themselves. This might mean feeling a deeper trust in institutions, adopting habits of respectful deliberation, gaining a sense of empowerment, or remaining active in civic life beyond the initial event, being convinced that DI is a legitimate tool to use as a decision maker. Importantly, this process can involve not only participants but also potentially anyone exposed by the innovation (including civil servants, resources persons, speakers, etc.).

People relate to democracy in different ways, and Scaling Deep can apply across several interrelated sub-dimensions. One is **performative**, where participants come away more satisfied with how democracy functions, feeling that the process was fair, effective, and worth trusting. This often translates into renewed belief that institutions can work in the public interest. Alongside this is the **normative one**, which reflects shifts in people's core democratic convictions: a stronger belief that democracy is the most legitimate form of government, and a growing appreciation for democratic practices such as listening, exchanging reasons, and tolerating disagreement.

The **symbolic sub-dimension** emerges when individuals feel heard, seen, and politically recognized—when their participation affirms that they matter and that their voice counts. These symbolic experiences are often accompanied by the **emotional sub-dimension**: a sense of pride, belonging, or hopefulness that stems from meaningful engagement with others in a shared civic project. Finally, there is the **behavioural sub-dimension**, which refers to the actions people take after their participation ends: do they continue to participate in civic life, engage with institutions, or take initiative in their communities? This could be evidence that something lasting has shifted.

These five dimensions — performance, normative, symbolic, emotional, and behavioural — capture the different but connected ways in which democratic innovations can leave a more and more meaningful, enduring mark.

Table 3. Scaling Deep: Sub-Dimensions and Main Components

Sub-Dimension	Main Component(s)
Performative	<ul style="list-style-type: none"> Increase of democratic trust and satisfaction with democracy
Normative	<ul style="list-style-type: none"> Internalization of deliberative norms and practices (listening, reason-giving, tolerance) Internalization of democratic principles
Symbolic	<ul style="list-style-type: none"> Growing sense of political empowerment and efficacy
Emotional	<ul style="list-style-type: none"> Formation of stronger emotional ties to democracy, including feelings of hope, belonging, or pride
Behavioural	<ul style="list-style-type: none"> Growth of sustained civic engagement beyond the initial innovation (e.g., participation in future democratic or civic activities)

1.4. Scaling In: Enhancing Process Quality

Scaling In refers to the capacity of a democratic innovation to preserve and continually improve the quality of its own internal processes. While other dimensions of scaling focus on reaching more people or influencing broader systems, Scaling In is concerned with refining the participatory process itself. It asks whether democratic innovations remain inclusive, fair, and procedurally sound as they grow or adapt over time. In other words, it is not just about how far or how high an innovation can go, but about how well it functions on the inside and how it can become even better. This dimension of scaling also resonates with widely recognised quality standards and ethical benchmarks for public participation processes, such as those set out in the OECD Guidelines (OECD, 2022).

A key concern of Scaling In is **inclusiveness**, whether different types of people are concretely ensured equal visibility, speaking turns, participation, etc. throughout the process. But while increasing diversity of participants is a Scaling Out process, inclusiveness here refers to interactional inclusion, ensuring that participants equally contribute in varied ways (e.g., emotional as well as rational expression), and are supported across the full cycle. A process inclusive in design but unable to sustain concrete and balanced engagement risks undermining its own democratic legitimacy. Importantly, inclusiveness also applies to whether innovations are long lasting. Is the process repeated across cycles? Is it built to endure changes in leadership, funding, or political context? Ensuring **continuity** is often what turns a promising innovation into a long-term, impactful, and democratic institution, and an important indicator of the quality of the overall process.

Closely related is **process integrity**, or the extent to which the participatory mechanism operates through transparent, structured, and respectful practices (Curato & Parry 2024, Parry & Curato 2025, Curato et al. 2024). Scaling In means ensuring clarity in rules and goals, that arguments are clearly expressed, opposing views are given fair hearing, and participants remain focused on the problem rather than falling into polarization or personal attacks. High-quality processes do not happen automatically, they must be supported by good design, organization, and management, especially as initiatives become more complex or grow in size.

This connects directly to **procedural effectiveness**, another core aspect of Scaling In. Democratic processes must not only feel fair, but they must also function well. That means sticking to clear agendas, maintaining coherence over time, and producing tangible outcomes like recommendations or decisions. A process that breaks down, loses clarity, or deviates significantly from its original purpose risks undermining participants’ trust and wasting their time.

Finally, Scaling In includes a strong **learning and feedback dimension**. Innovations that scale well internally are those that reflect on their own performance, adapt based on past experience, and build mechanisms for improvement. This might involve evaluations, participant feedback, or structured opportunities for review between cycles. Without this capacity for learning, even well-intentioned processes can stagnate or repeat their mistakes.

Table 4. Scaling In: Sub-Dimensions and Main Components

Sub-Dimensions	Main Component(s)
Inclusiveness	<ul style="list-style-type: none"> • Growing commitment to equal access • Improving interactional diversity • Reaching balanced participation throughout the process cycle
Integrity	<ul style="list-style-type: none"> • Growing clarity of procedural rules and expectations • Improvement of the Respectful, non-polarizing and structured engagement
Effectiveness	<ul style="list-style-type: none"> • Improvement of the consistency and coherence in the process design and outputs • Strengthening of the ability to produce tangible and meaningful outcomes
Continuity	<ul style="list-style-type: none"> • Growing Organizational resilience and capacity for repetition over time • Better Survival across political, financial, and contextual changes
Learning and Feedback Capacity	<ul style="list-style-type: none"> • Presence of better and more regular reflection and evaluation mechanisms • Increased ability to adapt and improve based on learning from previous cycles

2. Scaling Settings: Overcoming Scaling Barriers

Scaling democratic innovations, in any dimension, encounters the same obstacles as with other areas of social and policy innovation (e.g., van Lunenburg et al., 2020). These barriers vary across contexts but generally fall into five broad categories: **institutional, political, cultural, resource-based, and design-related**. The first two are typically found at the macro level, describing the broader political and institutional environment in which innovations unfold. The next two are often tied to micro-level features of the individuals or teams initiating or implementing the innovation. Finally, design-related barriers concern the meso level, that is, the internal structure and delivery of the democratic innovation itself. Any of these barriers can slow, limit, or altogether prevent scaling.

2.1 Listing Most Common Scaling Barriers

The list below provides a general overview of the main barriers to scaling democratic innovations. While it does not aim to be exhaustive in capturing every specific case, it is intended to map the broad categories under which most common obstacles to scaling democratic innovations can be grouped.

Starting from the macro level, one major barrier is structural in nature. In many places, public administrations often operate under incentive structures that prioritize control, efficiency, and risk-aversion over responsiveness or innovation. This can lead to a lack of motivation to create or engage with participatory mechanisms, especially when such mechanisms are not legally mandated or politically incentivized (Pogrebinschi & Ryan, 2018; Ruijter & Meijer, 2020). Even where there is **openness to experimentation, bureaucratic systems frequently lack the capacity, coordination, or flexibility to adapt.** Institutional inertia, rigid procedures, and a limited culture of public engagement continue to prevent democratic innovations from being **more systematically embedded into governance** (Meier et al., 2019; Corbett, 2018).

A second set of 'macro' challenges is socio-political. Political elites may see democratic innovations as a threat to their authority or control over decision-making. They may resist these processes outright or subtly undermine them by selectively embracing results that fit their agenda while ignoring others (Sønderskov, 2020; Junius et al., 2020). In other cases, elites may simply be indifferent, or sceptical of citizens' ability to contribute meaningfully, especially in complex or technical domains (Barry & Bannister, 2014). These dynamics can create a political environment where citizen participation is tolerated but not taken seriously.

At the individual level, barriers can be cultural and cognitive. People may lack confidence in their own ability to engage or have limited civic knowledge and experience with deliberative norms (Gastil & Richards, 2013). More broadly, this also includes limited understanding of political facts, or low ideological and political sophistication (Kinder and Kalmoe, 2017), which can inhibit meaningful engagement and deliberation. These factors can lead to low participation, weak trust in the process, or an inability to scale innovations across different settings (Christensen et al., 2016; Landwehr & Faas, 2016).

Resource constraints can represent another individual-level barrier, especially for initiatives run at the local level or by civil society actors. Democratic innovations require time, money, skills (facilitation, project management, campaigning, programming, communication, etc), and networks of support. When funding is unstable, staff are overstretched, or access to technology or expertise is limited, it becomes difficult to sustain or replicate innovations (Barry & Bannister, 2014; Schradie, 2018; Janssen et al., 2012). These challenges are particularly acute in under-resourced communities or where state support is inconsistent.

Finally, **at the ‘innovation’ (meso) level, an important barrier stems from the design or logistics of the DI itself**. Poorly structured processes, unclear goals, or insufficiently prepared implementation teams can undermine the scalability potential (in any direction) of an innovation (Warren, 2025; Suiter & Reuchamps, 2017; Caluwaerts & Reuchamps, 2023). If a process is overly localized or lacks clear pathways for scaling, its impact may remain limited to a single place or issue (Purcell, 2006; Falanga, 2024). Some processes rely too heavily on either digital or in-person methods, excluding those who cannot access one or the other (Rucht, 2012). Others use biased recruitment strategies, such as only inviting politically active individuals or failing to ensure demographic diversity, which further limits inclusiveness and representativeness (Smith, 2009).

Table 5. Major Barriers to Scaling Democratic Innovations

Barrier Type	Description	Key References
Regulatory / Institutional (<i>Macro level</i>)	Bureaucratic logics prioritizing risk-aversion, control, and efficiency; lack of administrative capacity.	Meier et al. (2019); Corbett (2018)
Socio-Political (<i>Macro level</i>)	Elite resistance, indifference, or selective support based on strategic interests or scepticism toward citizen competence.	Sønderskov (2020); Barry & Bannister (2014); Junis et al. (2020)
Cultural / Cognitive (<i>Micro level</i>)	Low civic knowledge, weak trust in the legitimacy or value of participation.	Gastil & Richards (2013); Christensen et al. (2016)
Resource-Based (<i>Micro level</i>)	Limited funding, staff, expertise, and support infrastructure; barriers to access in low-resource or politically marginal settings.	Barry & Bannister (2014); Janssen et al. (2012); Schradie (2018)
Design / Procedural / Logistical (<i>Meso level</i>)	Poor process design, vague agendas, biased recruitment, exclusive formats (digital-only or in-person-only), lack of scalability or institutional links.	Warren (2025); Suiter & Reuchamps (2017); Pogrebinschi & Ryan (2018); Purcell (2006); Rucht (2012); Smith (2011); Falanga (2024)

2.2. Overcoming Barriers

Recognizing the barriers to scaling democratic innovations is only part of the picture. Equally important is identifying the conditions under which these innovations are more likely to grow,

deepen, or become embedded in governance. This section offers a first step toward that understanding.

This analytical framework does not aim to establish rigid causal rules, that is the role of a fuller Theory of Scaling to come following empirical investigation. Instead, drawing on a broad, structured review of the literature, we identify and organise key conditions that may help democratic innovations overcome barriers and generate meaningful change across the four different scaling dimensions presented above. Our goal here is to structure and prioritise these enabling conditions to sketch a range of plausible pathways through which scaling might occur, not to provide an exhaustive list.

We also group these conditions across three analytical levels: the broader institutional and political environment (macro), the features of the innovation itself (meso), and the actors who design, support, or implement it (micro). This helps make sense of how different factors interact to support scaling. In doing so, we address a critical gap in much of the existing literature on democratic innovations, which, despite recent comparative efforts, has often focused on standout cases. As Spada and Ryan (2017) note, this can overlook the range of contextual factors needed for democratic innovations' success and replication. By broadening the focus to these enabling conditions, we lay the groundwork for more realistic and adaptable strategies for scaling democratic innovations. The following sections describe each category and explore how they relate to the four scaling dimensions.

2.2.1. Regulatory/Institutional Frameworks (Macro)

The broader institutional environment, its structures, rules, and administrative capacities significantly shapes the prospects for scaling democratic innovations. Formal frameworks can either open pathways for scaling by encouraging participation and experimentation, or constrain it through rigidity, bureaucratic inertia or lack of procedural support.

For Scaling Out, the openness of institutional settings to innovation, decentralization and cross-jurisdictional experimentation is especially important. When governance structures are less centralized, more flexible and supportive of localized adaptation, democratic innovations find more space to replicate across different settings (Meier et al., 2019; Feeney & DeHart-Davis, 2009; Osborne & Plastrik, 1997). Administrative stability and logistical capacity, such as the ability to support replication, manage data, or facilitate local adaptations, can also play a key role (Ferreira & Allegratti, 2019).

In Scaling Deep, institutional support takes a different form. Embedding civic education, especially education oriented toward deliberative democratic values within formal systems such as schools, universities and civic programs can profoundly gradually strengthen the cultural and normative foundations that sustain democratic innovations over time. Institutions that systematically teach deliberation, active citizenship, and democratic reasoning help cultivate citizens who are ready to engage meaningfully (Boggs, 1991; Carcasson & Sprain, 2012; Hanson & Howe, 2011; Levinson, 2012).

For Scaling In, the focus is on procedural scaffolding: whether institutions provide frameworks that support, incentivize, and standardize high-quality citizen participation. This includes establishing evaluation criteria, transparency requirements, feedback mechanisms and standardized guidelines for participatory processes. Institutional frameworks that encourage clear standards of fairness,

inclusivity, and deliberative integrity provide essential support for maintaining internal quality as democratic innovations grow (Pogrebinschi & Ryan, 2018).

Finally, **for Scaling High**, the successful integration of democratic innovations into formal decision-making depends on administrative stability and logistical capacity. Institutions must have the organizational infrastructure to 'absorb' participatory processes, manage outcomes and translate citizen inputs into actionable policy. Without administrative pathways and consistent commitment, scaling into formal law or policy is difficult to achieve (Pogrebinschi & Ross, 2019; Corbett, 2018).

2.2.2. Socio-Political and Cultural Contexts (Macro)

The socio-political and cultural environment strongly influences scaling as well. Civic traditions, public discourse norms, civil society dynamics and elite behaviour collectively form the informal ecosystem that can either foster or hinder scaling processes.

For Scaling Out, the presence of a deliberative civic culture, where public dialogue is valued and citizens expect participation, creates fertile ground for the expansion and replication of democratic innovations (Theuwis et al., 2025). Civil society plays a vital reinforcing role: advocacy coalitions, grassroots mobilization, and organized public pressure can push for the broader adoption of participatory practices (Pogrebinschi & Ryan, 2018). Elite behaviour also matters. Political or administrative elites may support democratic innovations out of ideological commitment, practical interest, or in response to electoral or societal pressures that demand greater public engagement (Barry & Bannister, 2014; Junius et al., 2020).

Scaling Deep similarly depends on the cultural and normative foundations of democracy. Societies with strong traditions of civic engagement and deliberative public discourse and norms provide the social soil in which democratic participation, including through innovative mechanisms, can take root and foster deeper value shifts (Gherghina and Geissel, 2017; see also Theuwis et al., 2025). In such contexts, individuals are more likely to internalize democratic norms and maintain emotional and behavioural commitments over time.

Experimental evidence suggests that for **Scaling In**, maintaining high-quality participation may benefit from similar cultural conditions. Where traditions or norms of civil dialogue and public engagement are strong, participants are more likely to respect the deliberative process standards norms, tolerate disagreement, and engage constructively, even as processes grow in size or complexity (Strandberg et al., 2019; Thewis et al., 2024). This can make it easier to uphold standards of inclusivity, fairness, and integrity also besides the deliberative sphere, contributing to process continuity and fostering a learning-oriented environment.

In the case of **Scaling High**, socio-political practices again prove decisive. Civil society organizations and advocacy networks can create bottom-up pressure for institutionalization, helping to secure formal uptake of participatory processes (Pogrebinschi & Ryan, 2018). At the same time, the positive exposure of elites to democratic innovations, through past participation or observation, can reduce scepticism and foster support (Sønderskov, 2020). More broadly, elite receptivity may stem from electoral incentives, pre-existing ideological commitments, or responses to societal demands for greater transparency and inclusion (Junius et al., 2020).

2.2.3. Characteristics and Resources of Innovation Implementers (Micro)

Who leads a democratic innovation, and how, can have a significant impact on its ability to scale. The motivations, strategic orientation and practical capacities of initiators and implementers often determine whether an innovation **remains a localized experiment or evolves into a systemically impactful process**. As research in public innovation highlights (van Lunenburg et al., 2020), these actor-level enablers typically take three forms: **willingness (strategic ambition), ability (skills and competencies), and resource access (organizational and material support)**.

For **Scaling Out**, the ambition to reach broader and more **diverse publics** must be matched with **strong outreach and communication skills**. Innovations are more likely to scale horizontally when implementers intentionally **design for mass inclusion and know how to mobilize different publics across contexts** (van Lunenburg et al., 2020). This outward scaling also hinges on **access to funding and partnership networks** that can help expand reach, particularly in contexts where public engagement depends on digital tools, community-based intermediaries, or targeted outreach (Newton, 2012; Schradie, 2018; Sønderskov, 2020).

Scaling Deep, by contrast, requires a different set of capacities. Implementers must be able to engage people not just intellectually, but emotionally, connecting with their values, identities, and lived experiences. This might involve historically grounded civic education (Nelsen, 2023), or storytelling approaches that resonate with participants' sense of meaning and belonging (Molder et al., 2024). Supporting these deep transformations also requires long-term partnerships, with schools, media platforms, or civic organizations, and resources that allow for repeated or ongoing engagement (Newton, 2012).

For **Scaling In**, the focus is on process quality, making sure that internal process standards remain high even as participation expands. This demands skilled facilitation and design leadership, particularly in moderating discussions, crafting structured formats, and resolving conflict. In this context, resource needs are not just financial, they also involve time, space, and professional support to ensure that the process is thoughtful and inclusive (Newton, 2012).

Finally, **Scaling High** depends heavily on navigating institutions and building alliances. Implementers need to understand policy environments, form cross-sector partnerships, and frame innovation outcomes in ways that resonate with decision-makers. Often, scaling to this level requires leveraging institutional channels—through formal invitations, insider networks, or coalitions with supportive actors inside government. In Brazil, for example, bureaucratic activists within the state have played a key role in advancing and institutionalising participatory initiatives, showing how committed officials can drive democratic innovations into formal structures (Abers, 2019).

2.2.4. Characteristics of the Innovation Itself (Meso)

The way a democratic innovation is structured and implemented can affect how easily it scales. Some innovations are designed with flexibility, adaptability or deliberative strength, qualities that make them more likely to work in new settings or reach more people. Others, by contrast, may be more context-dependent or limited by rigid formats. These intrinsic characteristics influence how well an

innovation can stretch across space, deepen its cultural reach, or anchor itself in formal institutions (Geissel, 2012; Elstub & Escobar, 2017).

For **Scaling Out**, designs that enable both the **inclusion** of more and more diverse participants and the **replication of processes across contexts** are particularly important. Inclusive models, such as hybrid formats, random or disproportionate selection (especially when stakes are unevenly distributed), can expand participation beyond the already engaged (Rucht, 2012; Meylan-Stevenson et al., 2024; Newton, 2012). **Replicability** also benefits from structured and standardized formats (e.g., clear agendas, expert Q&A, group deliberation, consensus reporting, campaign toolkit, process guidebook, etc) that can be **reproduced “as is” or adapted with minimal redesign, especially when supported by toolkits or facilitation guides** (Suiter & Reuchamps, 2017).

For **Scaling Deep**, design features that foster emotional resonance and long-term engagement are key. Repeated formats that allow participants to re-engage over time (Fernández-Martínez et al., 2020), or designs that bring in lived experiences, such as personal testimonies or parallel group formats, can help bridge technical content with day-to-day realities, supporting value internalization and a sense of civic identity.

For **Scaling In**, high-quality processes depend on more fine-grained procedural scaffolding: clear speaking rules, multi-phase structures, and carefully designed agendas (Suiter & Reuchamps, 2017; Mikhaylovskaya, 2023). Selection procedures again matter, random or disproportionate selection strategies can help ensure legitimacy, while designs that incorporate personal narrative alongside expert input maintain both inclusion and relevance. Strategic issue framing, particularly avoiding highly polarized topics, can also contribute to maintaining process integrity (Rucht, 2012).

Lastly, for **Scaling High**, strategic alignment between the design of the innovation and the of policymaking institutions increases the chances of formal uptake. Innovations that frame their work in ways that resonate with administrative logic or legal structures, are more likely to be institutionalized (Newton, 2012; Rucht, 2012). At the same time, if they succeed to frame a contentious topic well and create solutions/agreements, this might also support institutionalization.

Table 6. Key Enabling Factors Across Scaling Dimensions

Enabling Factor	Scaling Out	Scaling Deep	Scaling In	Scaling High
Innovation Characteristics (Meso)	✓	✓	✓	
Modular and replicable design formats	✓		✓	
Embeddedness of lived experience/testimony		✓	✓	
Structured deliberative agendas and phases	✓		✓	
Strategic framing and alignment with less polarized issues			✓	✓
Motivations and Abilities of Implementers (Micro)	✓	✓	✓	✓
Outreach and communication skills	✓			
Storytelling, civic education skills		✓		
Facilitation and deliberative design skills			✓	
Advocacy, institutional navigation, coalition-building				✓
Resource Access (Macro)	✓	✓	✓	✓
Funding and networks for expansion	✓			
Partnerships with education, media, civic orgs		✓		
Resources for process quality (time, staff, training)			✓	
Access to policymakers and formal institutional channels				✓
Regulatory / Institutional Frameworks (Macro)	✓	✓	✓	✓
Open frameworks	✓			
Civic education integration into institutions		✓		
Procedural standards for participatory processes			✓	
Administrative/logistical stability and capacity				✓
Socio-Political and Cultural Context	✓	✓	✓	✓
Deliberative civic culture and public discourse	✓	✓	✓	
Civil society pressure and mobilization	✓			✓
Elite support (due to positive exposure, electoral pressure, ideological commitment)	✓			✓

3. Relationship Between Scaling Dimensions and Feedback Loops

Scaling dimensions are not isolated from one another. In practice, we assume that progress along one dimension can open up possibilities for progress in others. Scaling often unfolds through feedback loops between dimensions, where developments in one area create favourable conditions for scaling elsewhere. Analytically and empirically, these potential interactions can be explored by examining how scaling indicators shift over time, either in single cases or ecosystems of innovations. Theoretical expectations about these pathways can later inform causal hypotheses, but at this stage, it is useful to map plausible connections. The example provided below offers a preliminary illustration of these feedback loops.

Scaling High can act as a catalyst for other forms of scaling. Legal mandates and formal recognition may increase the visibility, sustainability, and replicability of innovations, thereby supporting Scaling Out. For instance, if participatory budgeting becomes legally required across municipalities, it naturally expands participation across wider territories and demographics. Moreover, institutionalization may also foster Scaling In, by increasing the motivation of actors engaged in democratic practices, and by securing stable funding, professional facilitation, and clearer procedural standards that improve deliberative quality. Finally, formal uptake has the potential to enhance Scaling Deep, as citizens may develop greater trust in democratic processes when they see that participation can influence real-world outcomes.

Scaling Deep can also strengthen other dimensions. A strong civic culture based on deliberative principles may support Scaling In, by encouraging respectful engagement, tolerance, and thoughtful deliberation among participants. In parallel, widespread cultural support for participation may reduce institutional resistance, facilitating Scaling High when reforms are proposed or when democratic innovations seek formal adoption.

Scaling Out, by broadening participation, may generate feedback into both deliberative quality and democratic culture. Greater diversity of participants, if well-managed, can enrich discussions and support Scaling In by enhancing the inclusiveness and nuance of deliberations. Expanding participation can also contribute to Scaling Deep, particularly when groups historically excluded from public decision-making gain a sense of empowerment and belonging through meaningful engagement. It could perhaps also come with threats for that particular dimension, if it dilutes potential for consensus due to greater group interests and fewer points of agreement. Additionally, under certain conditions, broad participation may create political momentum that supports Scaling High, although volume alone is rarely sufficient without strategic advocacy and elite responsiveness.

For **Scaling In**, high-quality participatory processes can contribute to the development of deeper democratic dispositions among individuals exposed to the innovation (Scaling Deep). When participation is experienced as fair and meaningful, individuals may come to engage more strongly with democratic practices, develop a clearer sense of civic identity, and feel a greater sense of political efficacy. At the same time, cultural norms that emphasize equality, mutual respect, transparency, shared responsibility and compromise can help sustain process quality over time.

Table 7. Possible Feedback Loops Between Scaling Dimensions

Scaling High ↔ Scaling Out	<ul style="list-style-type: none"> • Institutional embedding can facilitate broader outreach and replication. • Widespread participation can, under certain conditions, generate momentum for formal institutional uptake.
Scaling High ↔ Scaling In	<ul style="list-style-type: none"> • Formalization and stable support can enhance process quality and deliberative standards. • High-quality processes can build legitimacy and support, making institutionalization more feasible.
Scaling High ↔ Scaling Deep	<ul style="list-style-type: none"> • Institutional recognition can reinforce trust in democracy and deepen civic norms. • A democratic culture supportive of participation can lower barriers to formal embedding.
Scaling Out ↔ Scaling In	<ul style="list-style-type: none"> • Expanding participation can diversify and enrich deliberative quality if well-designed. • Strong internal process quality can sustain expansion by maintaining legitimacy and engagement.
Scaling Out ↔ Scaling Deep	<ul style="list-style-type: none"> • Broad participation, especially by marginalized groups, can foster empowerment and civic identity transformation. • A culture of engagement and empowerment can, in turn, support sustained and expanded participation.
Scaling In ↔ Scaling Deep	<ul style="list-style-type: none"> • High-quality processes can cultivate deeper democratic values among participants. • Strong civic norms and emotional ties to democracy can sustain high quality standards over time.

Overall, scaling should be understood as a dynamic, interconnected process, where multiple dimensions may reinforce or unlock one another over time. Recognizing these possible feedback loops is key to building a flexible and realistic understanding of how democratic innovations grow and endure. This is not to say that there may not also be negative feedback loops between scaling dimensions, a hypothesis we want to further explore in a second stage of the process. For instance, Scaling deep might be impeded by the formal nature of certain process (Scaling High) which can

impede a certain sense of freedom and creativity. Similarly, accelerated Scaling Out and replication might happen at the cost of Scaling in and the quality of the process. Such negative correlations or even causations are equally worth exploring.

This raises new questions in turn that we hope to address in the second stage: what is the dominant direction of causality between these dimensions? Do we observe general patterns of sequencing between them? Under which conditions are they mutually reinforcing? How do we know that scaling dimensions affect each other, rather than due to some common external cause? What do these interactions look like in the eyes of individuals or groups engaged in democratic innovations?

Since each democratic innovation occurs within a specific institutional, social, and temporal context, we find that some contexts are more amenable to certain scaling dimensions rather than others. For instance, some contexts exhibiting string state-society relations may lead to strong policy integration (Scaling High) while struggling to engage broadly (Scaling Out). Other context with high social capital may foster deep civic engagement (Scaling Deep) without formal recognition. Each innovation thus reflects a **distinct scaling profile**, a unique combination of progress along these dimensions, shaped by its goals, design, and environment.

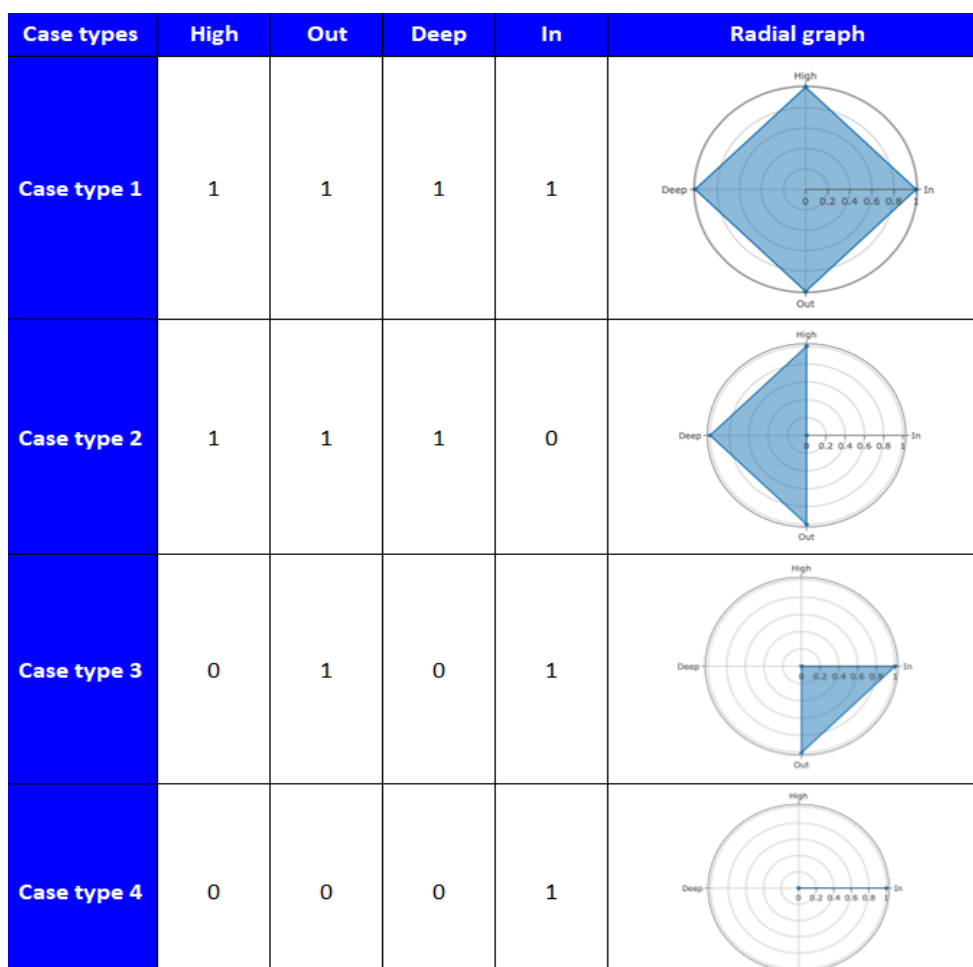


Figure 1. Scaling Dimensions as Spider Charts – Example Representation

To capture this diversity, we propose representing the scaling profile of a democratic innovation using a **spider chart**. This visual tool allows us to map the relative strength or extent of scaling across the four dimensions, offering a clear, comparative snapshot of how an innovation is evolving at a given moment. An example graphic is provided above.

Spider charts lend themselves to different degrees of achievement along each of the dimensions that can take on values between 0 and 1. Moreover, spider charts allow to ‘measure’ in an intuitive way not only the overall scaling potential of a given innovation but also the theoretical potential of a combination of innovations. In keeping with the spatial metaphors attached to each of our four dimensions, a spider diagram attached to a given case or case type offers an immediate and intuitive measure of the “democratic space” opened up by the said case.

This in turn can point to one of the value-added of the ScaleDem project as a whole. This analytical framework has started hinting towards plausible pathways through which scaling might occur, on the basis of which a first iteration of a Qualitative Comparative Analysis of the different cases identified in the [ScaleDem Knowledge Map](#) will be implemented. On such a ground, an initial Theory of Change will be able to offer hypothesis about “scaling combinatrix” to be further tested and refined throughout the entire project duration, in subsequent Work Packages, and notably through ScaleDem Scaling Grounds.

Conclusion

This framework provides a structured, multidimensional lens to understand how democratic innovations can scale. It identifies a broad set of enabling conditions which, depending on their specific configuration, may help innovations overcome barriers and achieve progress across different scaling dimensions. Some factors may be particularly decisive in certain contexts; others may compensate for what is missing elsewhere. The relevance of any one condition is likely to depend on the scaling goal, institutional setting, and design of the innovation itself.

Importantly, at this stage of the project, the present framework does not propose a universal formula for success, nor does it claim to establish conditions of causal necessity or sufficiency. Rather, it maps a **range of plausible pathways** through which scaling might occur. It serves as an analytical scaffold, helping practitioners and researchers identify key dimensions, analytical standpoints, and corresponding factors at play, and assess where support, adaptation, or intervention might be needed, and by whom.

The next step is theoretical yet empirically driven. Using iteratively QCA, and a variety of mixed methods to investigate each scaling dimensions, we intend to develop a Theory of Change and explore how these enabling conditions combine and interact, identifying the **causal mechanisms** that explain how and why scaling unfolds in different circumstances. It will aim to open the “black box” of scaling, clarifying how different trajectories emerge, when certain factors become essential, and under what conditions they might substitute for one another or reinforce each other. We very much hope to uncover some surprising insights, small seeds that can produce big effects or conversely conventional *idees recues* that will not stand the test of time.

In this sense, the analytical framework presented here is not a final answer, but a foundation: a way to better observe, compare, and understand the complex realities of scaling democratic innovations.

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