

Discrete Causal Representations from Heterogeneous Domains

A Bayesian Approach with Social Survey Applications

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2026 ISBA World Meeting

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University of Chicago

Julius von Kügelgen
ETH Zürich

WHAT IS CAUSAL REPRESENTATION LEARNING?

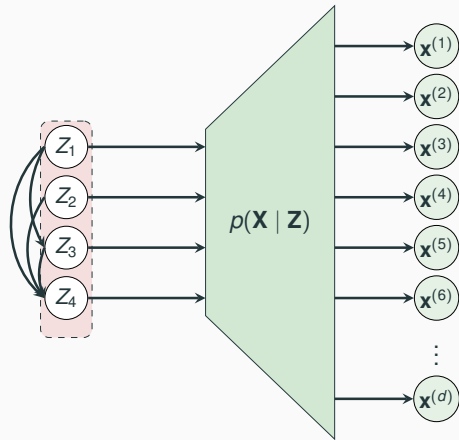
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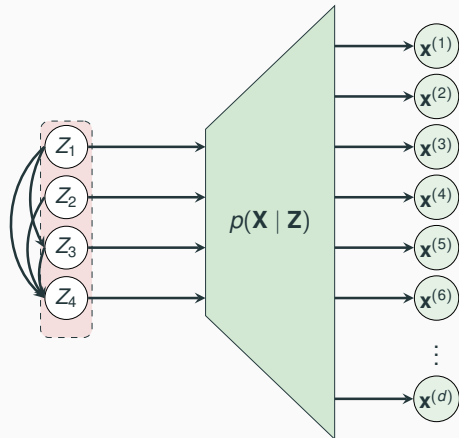
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- ▶ CRL¹ aims to infer:
 - ▶ Latent Causal Variables $\mathbf{Z}$
 - ▶ Latent Causal Graph

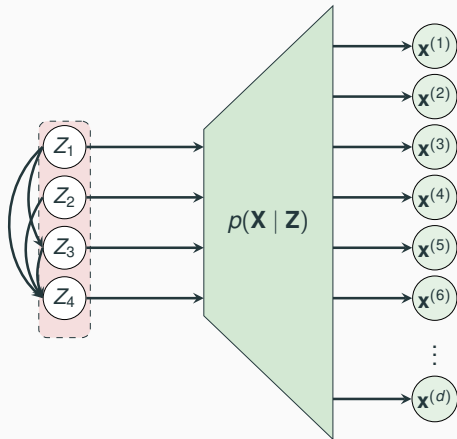


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¹ Schölkopf et al. *Toward Causal Representation Learning*. Proceedings of the IEEE, 2021.

Independent Causal Mechanisms²

$$p(\mathbf{z}) = p(z_1, \dots, z_L) = \prod_{\ell=1}^L p_{\ell}(z_{\ell} \mid \mathbf{pa}_{\ell})$$



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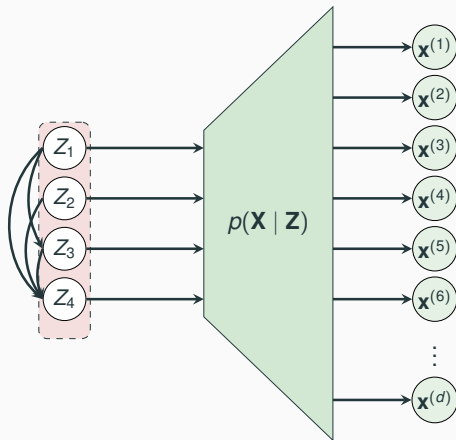
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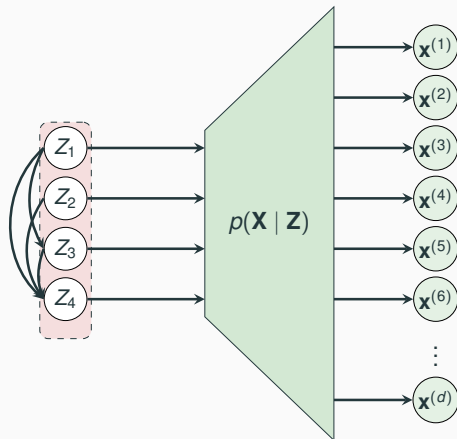
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Marginal observational distribution

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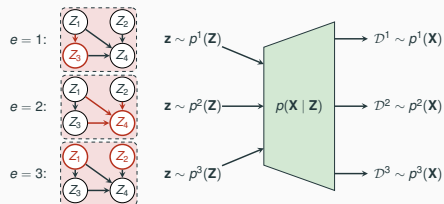


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MULTI-DOMAIN DATA ASSUMPTIONS

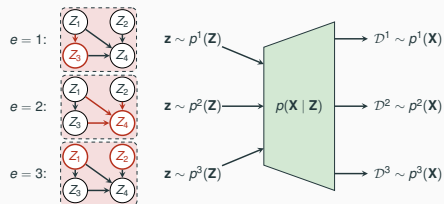
- We observe datasets $\{\mathcal{D}^e\}_{e \in \mathcal{E}}$.
- $\mathcal{D}^e$ is a set of i.i.d. samples from a domain-specific distribution $p^e(\mathbf{X})$



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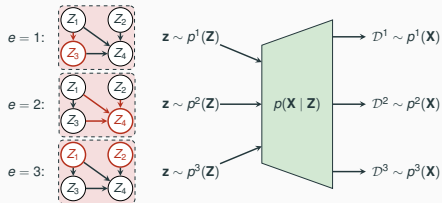
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A1: Invariant measurement model

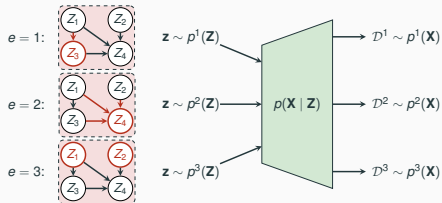
Only the latent distribution changes across domains:

$$\mathbf{z}^{e,j} \sim p^e(\mathbf{Z}), \quad \mathbf{x}^{e,j} \sim p(\mathbf{X} | \mathbf{Z} = \mathbf{z}^{e,j})$$

$$p^e(\mathbf{x}) = \sum_{\mathbf{z}} p(\mathbf{x} | \mathbf{z}) p^e(\mathbf{z})$$

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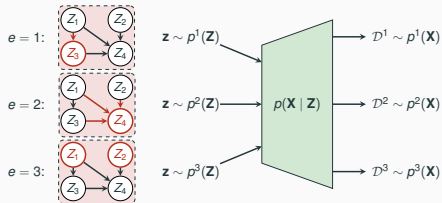
A2: Shared mechanisms³

Unintervened mechanisms are shared across domains.

$$p^e(\mathbf{z}) = \prod_{\ell \in \mathcal{I}^e} \tilde{p}_\ell^e(z_\ell \mid \mathbf{pa}_\ell) \prod_{\ell \notin \mathcal{I}^e} p_\ell(z_\ell \mid \mathbf{pa}_\ell)$$

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A3: Sparse Mechanism Shift^{1,3}

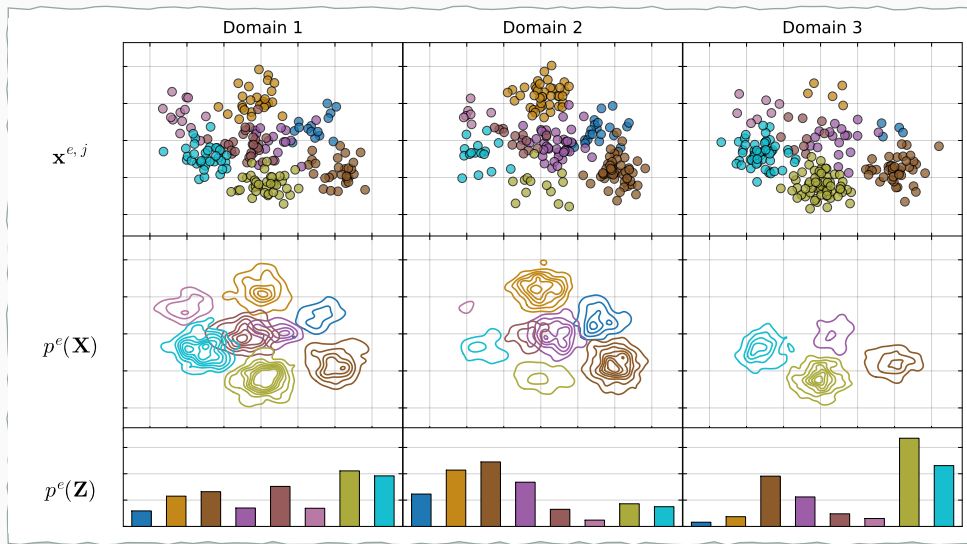
Each domain changes only a small subset of mechanisms:

$$|\mathcal{I}^e| \ll L$$

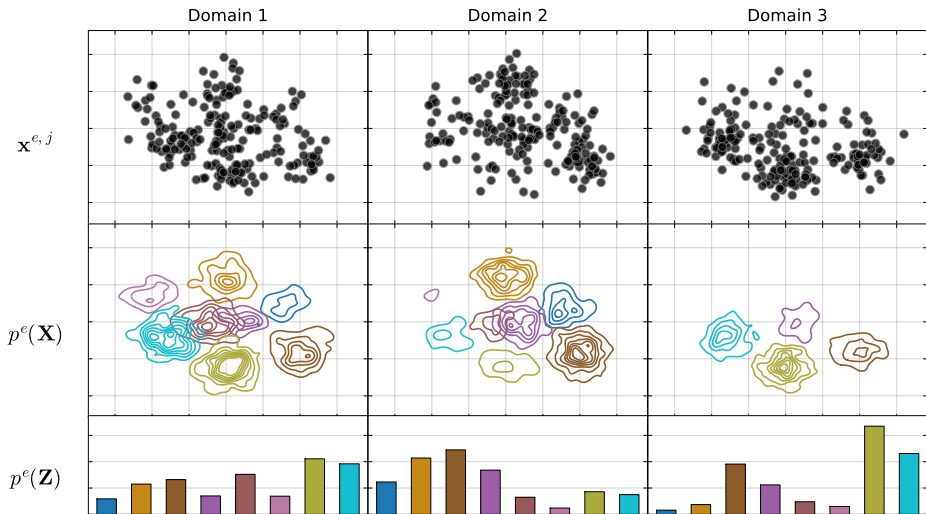
³Perry et al. *Causal Discovery in Heterogeneous Environments under the Sparse Mechanism Shift Hypothesis*. NeurIPS, 2022.

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Measurement Model

$$\mathbf{x}^{e,j} \sim \mathcal{N}_D \left(\mathbf{m}_0 + \sum_{\ell \in [L]} \mathbf{m}_\ell z_\ell^{e,j}, \text{diag}(\sigma^2) \right)$$

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Latent Mechanisms

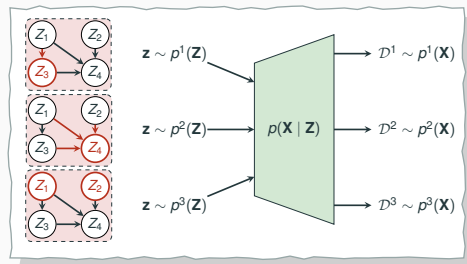
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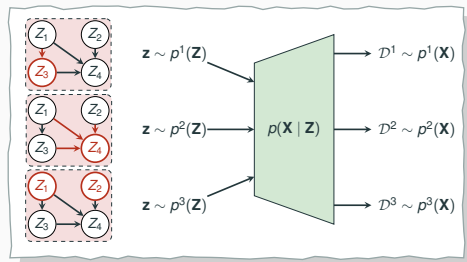
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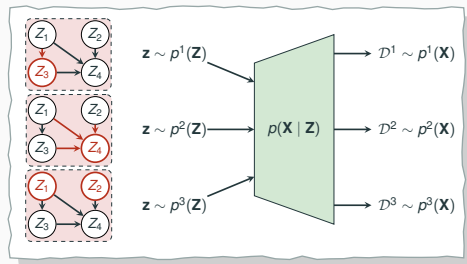
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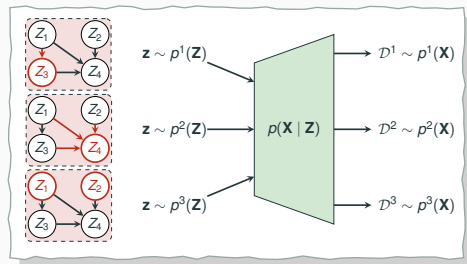
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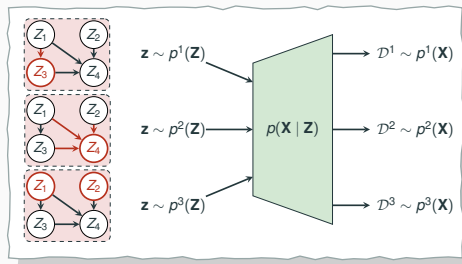
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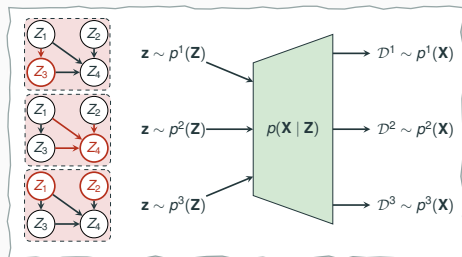
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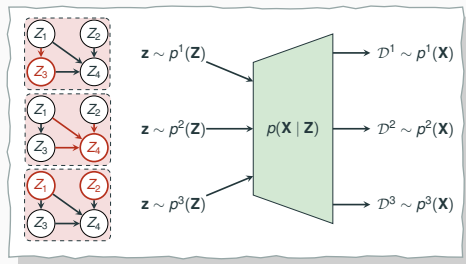
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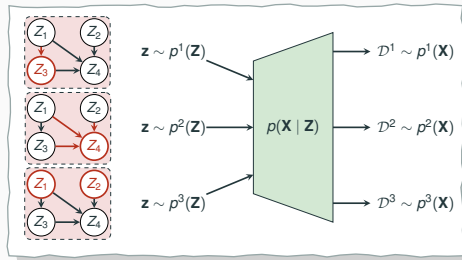
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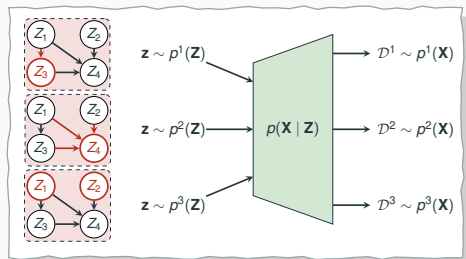
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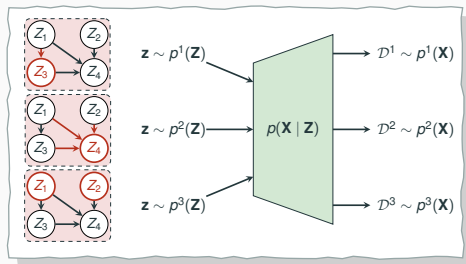
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$$p(Z_\ell = k) \propto e^{\theta(\mathbf{pa}_\ell)_k + \mathcal{I}_\ell^e \delta^e(\mathbf{pa}_\ell)_k}$$

ε -intervention-detectability

For each candidate shift $(\ell, e, \mathbf{pa}_\ell)$, either the mechanism is unchanged,

$$p^e(Z_\ell \mid \mathbf{pa}_\ell) = p(Z_\ell \mid \mathbf{pa}_\ell),$$

or the change is bounded away from zero:

$$\text{KL}(p(Z_\ell \mid \mathbf{pa}_\ell) \parallel p^e(Z_\ell \mid \mathbf{pa}_\ell)) \geq \varepsilon.$$

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Second-order approximation

$$\begin{aligned} D(\delta) &= \text{KL}(\text{softmax}(\theta) \parallel \text{softmax}(\theta + \delta)) \\ &\approx \frac{1}{2} \delta^\top H_\theta \delta \\ &\approx \frac{1}{2} \delta^\top H_0 \delta, \quad H_0 = \frac{1}{K} \left(\mathbf{I} - \frac{1}{K} \mathbf{1} \mathbf{1}^\top \right). \end{aligned}$$

SHIFT PRIOR: DETECTABILITY AND KL APPROXIMATION

$$p(Z_\ell = k) \propto e^{\theta(\mathbf{pa}_\ell)_k + \mathcal{I}_\ell^\theta \delta^e(\mathbf{pa}_\ell)_k}$$

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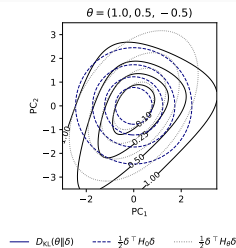
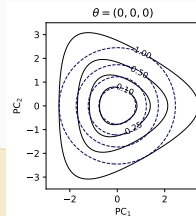
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Log-space Gaussian priors

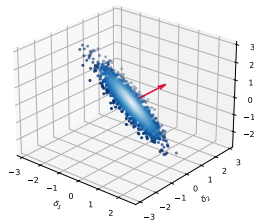
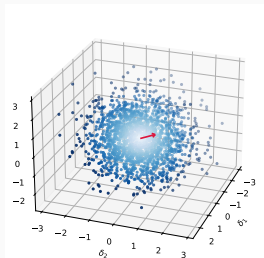
$$\theta_\ell(\mathbf{pa}_\ell) \sim \mathcal{N}_K(\mathbf{0}, \Sigma_\Theta),$$

$$\Sigma_\Theta = \text{diag}(\sigma_\Theta^2) - \frac{1}{K} \sigma_\Theta \sigma_\Theta^\top$$

$$p(\delta \mid \Sigma_\Delta, \varepsilon) \propto \mathcal{N}_K(\mathbf{0}, \Sigma_\Delta) \mathbb{1}\left\{\frac{1}{2} \delta^\top \mathbf{H} \delta \geq \varepsilon\right\}$$

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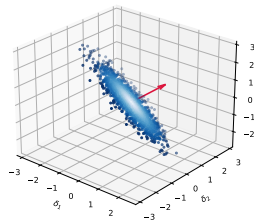
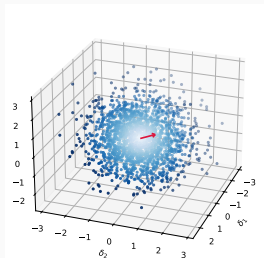
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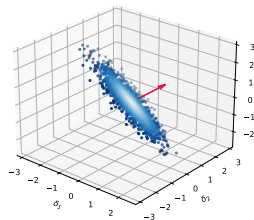
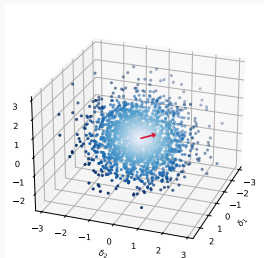
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Measurement model symmetry

For any permutation $\pi \in S_L$ of latent coordinates,

$$p(\mathbf{x} \mid \mathbf{z}, \mathbf{M}, \sigma) = p(\mathbf{x} \mid \mathbf{z}_\pi, \mathbf{M}_\pi, \sigma)$$

$$\mathbf{z}_\pi = (z_{\pi(1)}, \dots, z_{\pi(L)})$$

$$\mathbf{M}_\pi = \begin{bmatrix} \mathbf{m}_0 & \mathbf{m}_{\pi(1)} & \cdots & \mathbf{m}_{\pi(L)} \end{bmatrix}$$

In the additive Gaussian model, column $\mathbf{m}_\ell$ determines how Z_ℓ affects the mean of $\mathbf{x}$.

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Why this matters

- The causal graph is fixed to a complete DAG ordered

$$Z_1 \preceq \cdots \preceq Z_L.$$

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- Permuting columns of $\mathbf{M}$ permutes the causal order of latent concepts.

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The measurement model is symmetric; the full model is not, because the priors over $\mathbf{Z}$ break this symmetry.

World Values Survey

- ▶ Large-scale cross-national survey measuring values, beliefs, and norms⁴.
- ▶ Covers topics such as democracy, religion, gender equality, societal trust, work, and economic security.
- ▶ We focus on wave 7, conducted from 2017–2022.

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CRL setup

- ▶ **x**: responses to survey questions.
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- ▶ **e**: country / survey environment.
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$D = 37$

survey questions

85,851

total responses

$L = 3, K = 3$

discrete latent variables

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MEASUREMENT MODEL

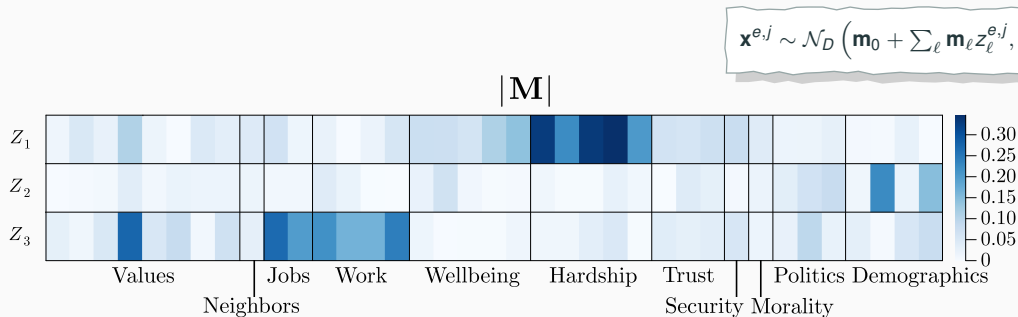
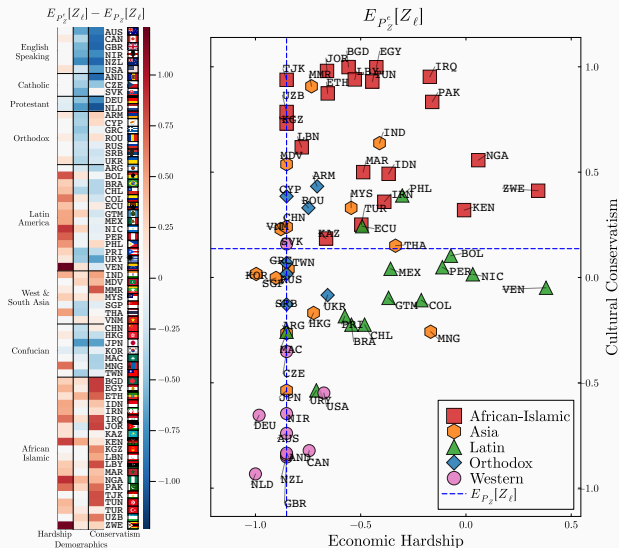


Figure 1: Measurement matrix from latent variables to survey responses.

$Z_1 \mapsto$ economic hardship, $Z_2 \mapsto$ demographics, $Z_3 \mapsto$ cultural conservatism

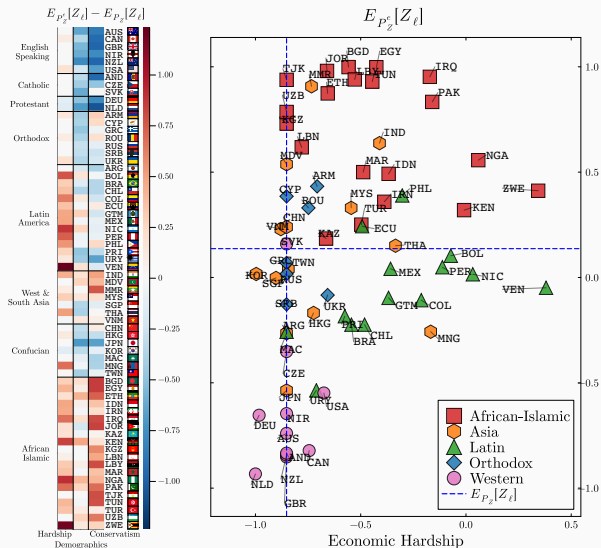
LATENT MAP



$$\mathbf{x}^{e,j} \sim \mathcal{N}_D \left(\mathbf{m}_0 + \sum_{\ell} \mathbf{m}_{\ell} z_{\ell}^{e,j}, \text{diag}(\sigma^2) \right)$$

$$z_{\ell}^{e,j} \sim \text{Cat} \left(\text{softmax} \left(\theta_{\ell}(\mathbf{p}_{\ell}^{e,j}) + \mathcal{I}_{\ell}^e \delta_{\ell}^e(\mathbf{p}_{\ell}^{e,j}) \right) \right)$$

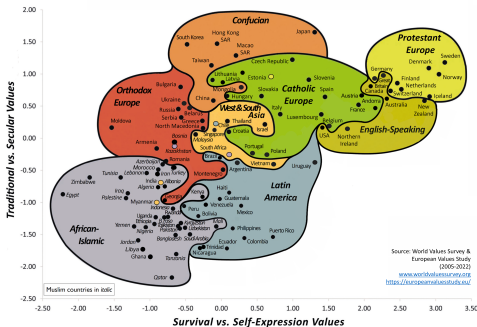
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The Inglehart-Welzel World Cultural Map 2023



CAUSAL GRAPH RECOVERY

Ordering of latent concepts

hardship $\preceq$ demographics $\preceq$ cultural conservatism

Post-hoc edge strength

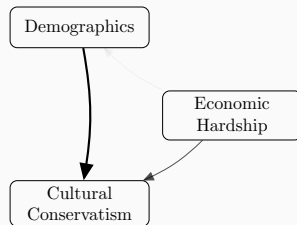
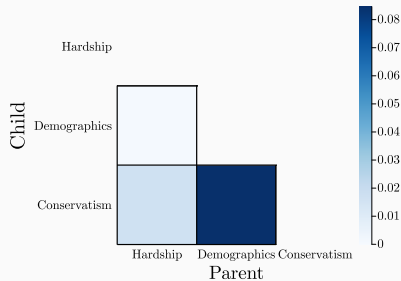
*Causal influence*⁵ measures the change in the joint distribution when the direct influence of Z_j on Z_ℓ is removed.

$$CI_p^{j \rightarrow \ell} := D_{\text{KL}}(p(\mathbf{Z}) \parallel p^{j \rightarrow \ell}(\mathbf{Z})),$$

$$p^{j \rightarrow \ell}(z_\ell \mid \mathbf{pa}_\ell \setminus z_j) = \int p(z_\ell \mid \mathbf{pa}_\ell) p(z_j) dz_j$$

and $p^{j \rightarrow \ell}(\mathbf{Z})$ is the interventional distribution arising from replacing $p(z_\ell \mid \mathbf{pa}_\ell)$ by $p^{j \rightarrow \ell}(z_\ell \mid \mathbf{pa}_\ell \setminus z_j)$.

Baseline Causal Influence



⁵ Janzing et al. *Quantifying Causal Influences*. The Annals of Statistics, 2013.

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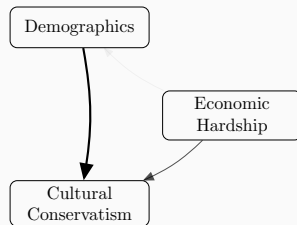
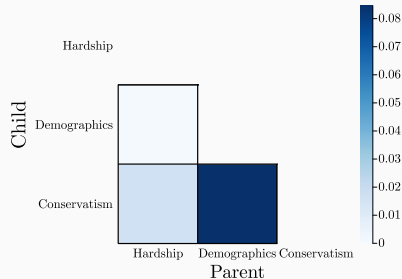
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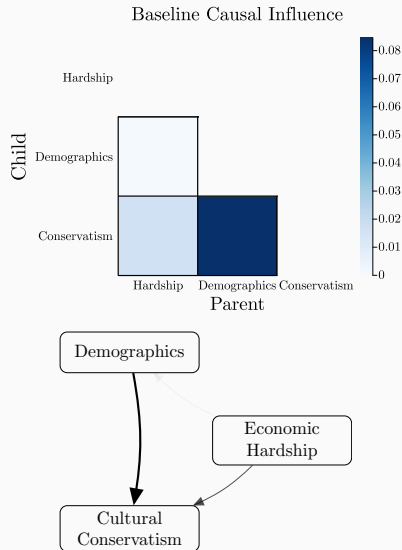
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We also can look at intervention indicators($\mathcal{I}$), direction(Δ), and relations per environment.



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POSTERIOR LANDSCAPE

Evidence across causal orderings

$$\log \text{BF}(\pi) = \log p(\mathbf{X}, \Psi_{\pi}) - \log p(\mathbf{X}, \Psi_{\pi^*})$$

Red points are latent-order permutations; blue paths interpolate. The true ordering is the reference.

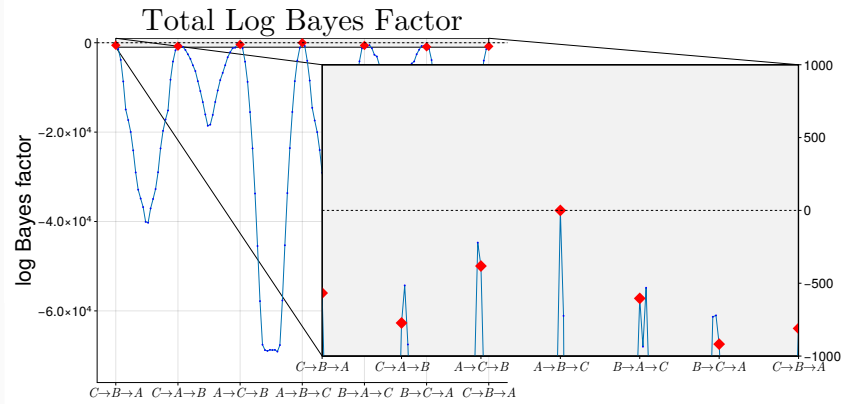


Figure 2: Multimodality across permutations of the causal ordering.

POSTERIOR LANDSCAPE

$$\log \text{BF}(\pi) = \underbrace{\Delta \log p(\mathbf{Z}_\pi, \Phi_\pi)}_{\text{latent mechanisms}} + \underbrace{\Delta \log p(\mathbf{X}, \Psi_\pi | \mathbf{Z}_\pi)}_{\text{measurement model}}.$$

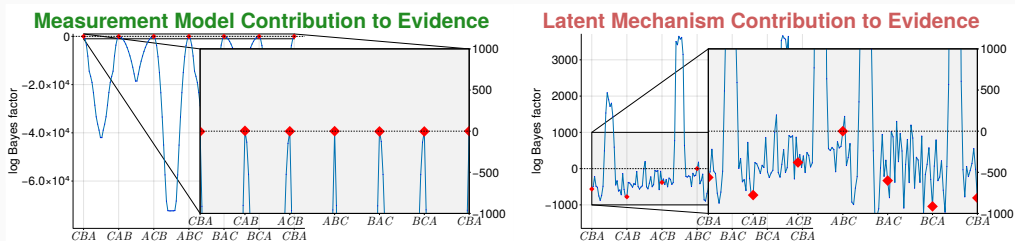


Figure 3: Measurement model creates permutation modes; latent mechanisms distinguish among them.

Inference strategy

- ▶ The model admits closed-form conjugate updates for most parameter blocks.
- ▶ The exception is (Θ, Δ) ; we exploit Pólya–Gamma augmentation⁶.

⁶ Polson et al. *Bayesian inference for logistic models using Pólya–Gamma latent variables*. JASA, 2013.

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Likelihood-tempered SMCS

Many weighted particles explore causal-ordering modes in parallel⁷.

$$p_{T_k}(\Phi, \Psi, \mathbf{Z} \mid \mathbf{X}) \propto p(\Phi)p(\Psi)p(\mathbf{Z}, \mathbf{X} \mid \Phi, \Psi)^{1/T_k}$$

$$\infty = T_0 > T_1 > \dots > T_K = 1, \quad \Phi = (\Theta, \mathcal{I}, \Delta), \quad \Psi = (\mathbf{M}, \sigma^2)$$

```

 $(\Phi, \Psi, \mathbf{Z})_0^{(s)} \stackrel{\text{i.i.d.}}{\sim} p_{T_0}(\Phi, \Psi, \mathbf{Z})$ 
 $w_0^{(s)} \leftarrow 1/S$ 
for  $k = 1$  to  $K$  do
  Set weights  $w_k^{(s)} \propto w_{k-1}^{(s)}$ 
   $\left[ p(\mathbf{Z}^{(s)}, \mathbf{X} \mid \Phi^{(s)}, \Psi^{(s)}) \right]^{1/T_k - 1/T_{k-1}}$ 
  Resample particles using  $\{w_k^{(s)}\}_{s=1}^S$ 
   $(\Phi, \Psi, \mathbf{Z})_k^{(s)} \leftarrow \text{GIBBSUPDATE}((\Phi, \Psi, \mathbf{Z})_{k-1}^{(s)}, T_k)$ 
end for
Return weighted particles at  $T_K = 1$ 

```

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PredictWise political opinion surveys

- ▶ Collected from U.S. respondents between 2017–2022.
- ▶ 7.8k respondents; 75.5k item-level responses.
- ▶ Each survey covers one political topic pair, with issue questions plus party/vote-choice questions.
- ▶ We analyze two surveys: *Trade & Regulation* and *Elites & Racism*.

7.8k

respondents

12

natural domains

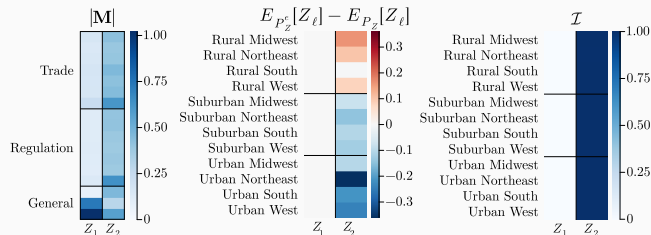
CRL setup

- ▶ **x**: political issue, party, and vote-choice responses.
- ▶ **z**: latent political attitudes within each survey.
- ▶ **e**: region $\times$ urbanicity survey environment.

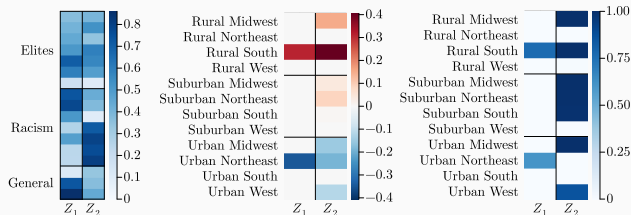
$L = 2, K = 5$

discrete latent variables

US SURVEY DATA: MOSTLY ONE-DIMENSIONAL



(a) Trade and Regulation



(b) Elites and Racism

What the model finds

- Most cross-environment variation collapses onto a single left-right axis.
- *Trade & Regulation*: clear rural-urban gradient.
- Rural domains shift right, urban domains shift left, suburban domains lie in between.
- *Elites & Racism*: similar gradient, with larger deviations in the rural South and urban Northeast.

LLM INTERVENTION PIPELINE

We use the PredictWise survey design, but replace natural domain shifts with controlled interventions on latent political topics.

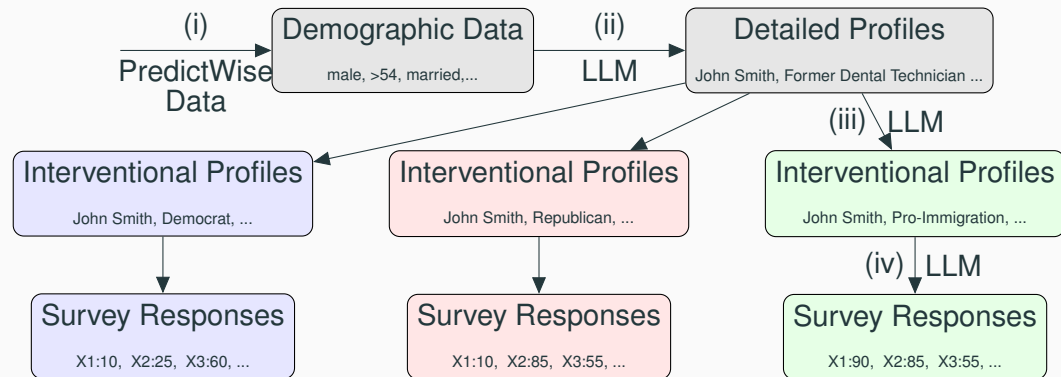
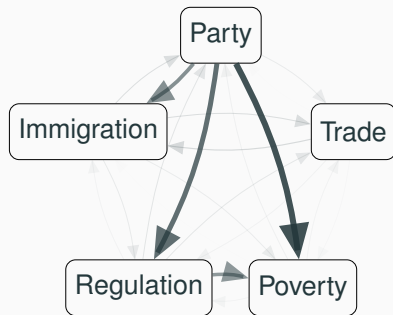
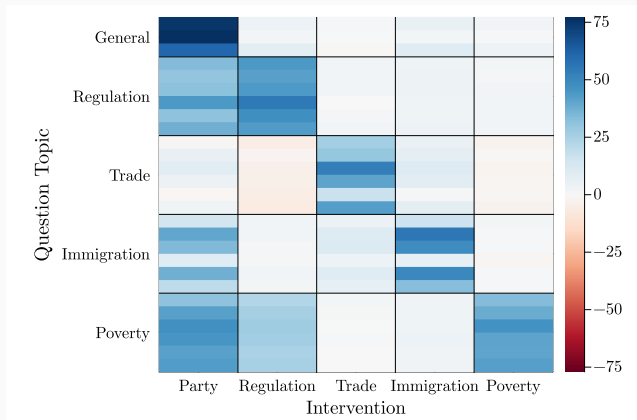


Figure 5: Four-stage pipeline: sample demographics, expand profiles, apply interventions, then generate survey responses.

LLM REFERENCE EFFECTS

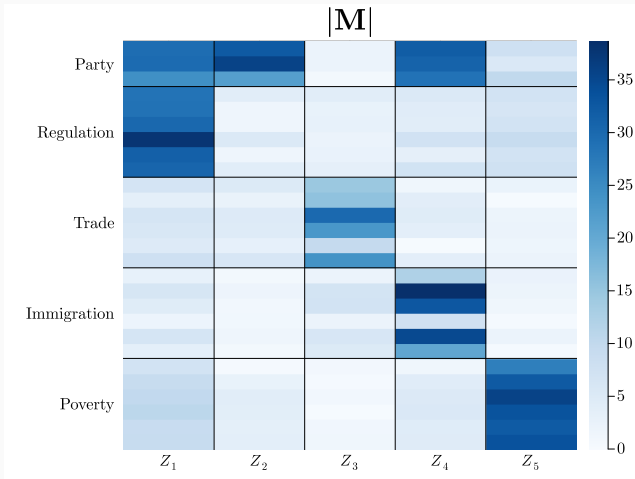
$$\text{ATE}(d, \ell) = \mathbb{E}_{do(Z_\ell \rightarrow +0.5)}[X_d] - \mathbb{E}_{do(Z_\ell \rightarrow -0.5)}[X_d],$$

$$w_{T, \ell} = \frac{1}{|T|} \sum_{d \in T} \text{ATE}(d, \ell).$$



Reference effects computed directly from known LLM intervention pairs; the structure is nearly block-lower-triangular, with strong party/regulation effects and weak trade effects.

LLM MEASUREMENT RECOVERY



Interpreting latents

The posterior mean $|\mathbf{M}|$ recovers the topic blocks used to generate the synthetic survey.

$Z_1 \mapsto$ Regulation(& Party)

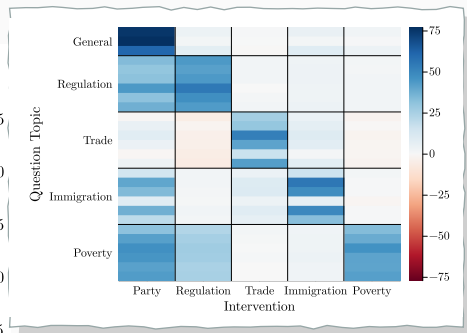
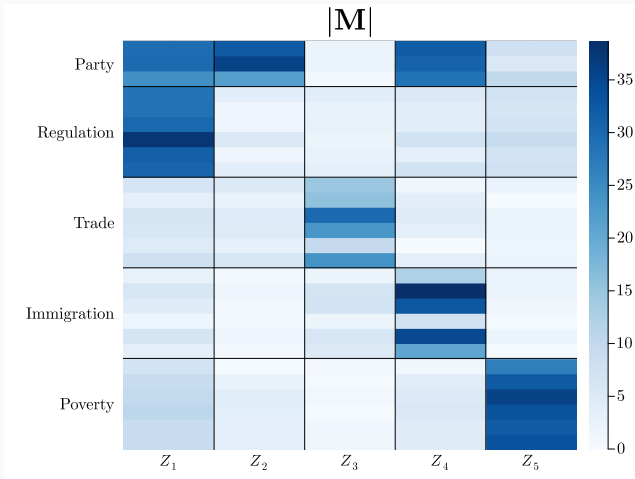
$Z_2 \mapsto$ Party

$Z_3 \mapsto$ Trade

$Z_4 \mapsto$ Immigration(& Party)

$Z_5 \mapsto$ Poverty

LLM MEASUREMENT RECOVERY



$Z_1 \mapsto \text{Regulation}(\& \text{Party})$

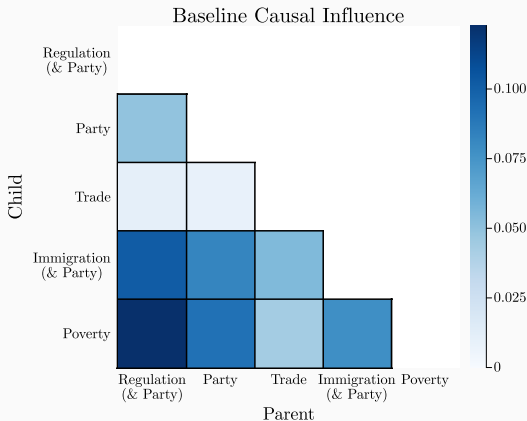
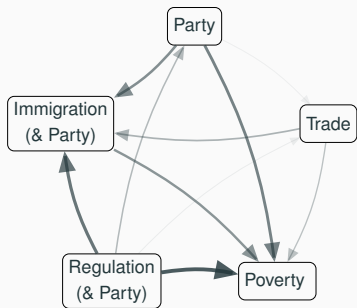
$Z_2 \mapsto \text{Party}$

$Z_3 \mapsto \text{Trade}$

$Z_4 \mapsto \text{Immigration}(\& \text{Party})$

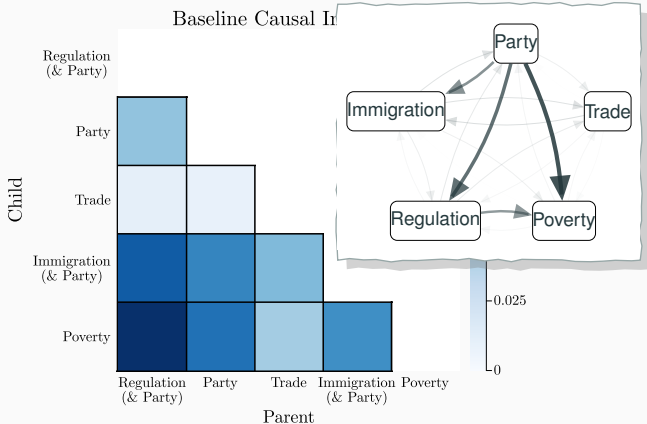
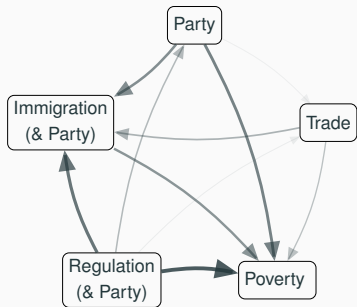
$Z_5 \mapsto \text{Poverty}$

LLM CAUSAL INFLUENCE RECOVERY



- Largest recovered edge: Regulation $\rightarrow$ Poverty.
- Trade is nearly independent of the other issue dimensions.
- Party signal is split across recovered latents, so party edges are less isolated.

LLM CAUSAL INFLUENCE RECOVERY

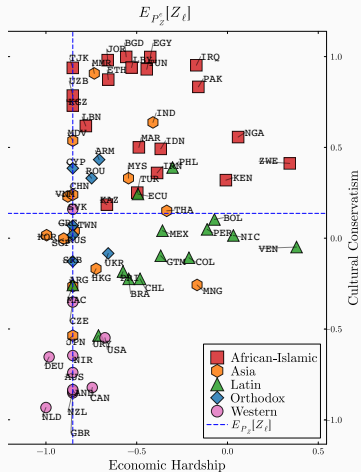
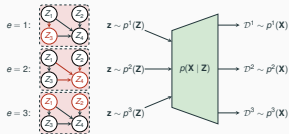


- Largest recovered edge: Regulation $\rightarrow$ Poverty.
- Trade is nearly independent of the other issue dimensions.
- Party signal is split across recovered latents, so party edges are less isolated.

THANK YOU

Thank you

Questions?



APPENDIX: KL SHIFT PRIOR

Finite-sample lower bound For testing $H_0 : p = p_0$ versus $H_1 : p = p_\delta$ with N_e samples,

$$p_0(T) + p_\delta(1 - T) \leq \eta$$

$$\Rightarrow \text{KL}(p_0 \| p_\delta) \geq \frac{2(1 - \eta)^2}{N_e}.$$

A detectable intervention therefore needs KL signal bounded away from zero.

Local KL expansion

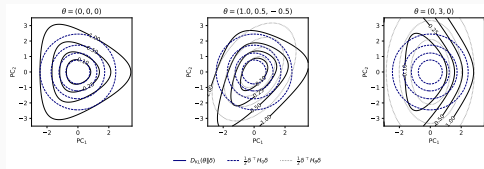
$$\text{KL}(\text{softmax}(\theta) \| \text{softmax}(\theta + \delta)) \approx \frac{1}{2} \delta^\top H_\theta \delta,$$

$$H_\theta = \text{diag}(p) - pp^\top, \quad p = \text{softmax}(\theta).$$

Fixed Hessian for tractability

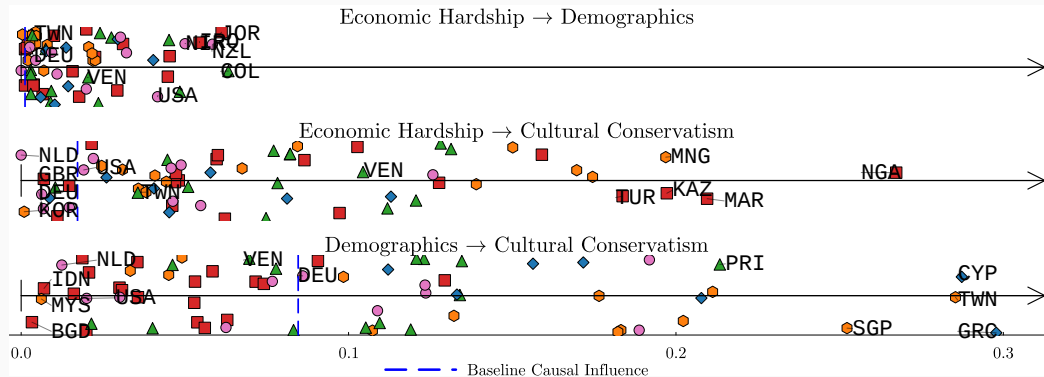
If the truncation depends on θ , its normalizing constant also depends on θ , breaking conjugate updates.

$$\frac{1}{2} \delta^\top H_0 \delta \geq \varepsilon, \quad H_0 = \frac{1}{K} \left(\mathbf{I} - \frac{1}{K} \mathbf{1}\mathbf{1}^\top \right).$$



The approximation is best near $\theta = \mathbf{0}$ and degrades for highly concentrated categorical distributions.

APPENDIX: ENVIRONMENT-SPECIFIC CAUSAL INFLUENCE



Baseline CI is only one view.

Environment-specific interventions may strengthen or weaken the dependencies among latent concepts.

Country-level variation.

The overall pattern is similar, but $Z_{\text{hard}} \rightarrow Z_{\text{cons}}$ and $Z_{\text{demo}} \rightarrow Z_{\text{cons}}$ vary substantially across countries, while $Z_{\text{hard}} \rightarrow Z_{\text{demo}}$ stays small.

APPENDIX: LABEL SWITCHING

Sign-flip symmetry

For any $\mathbf{s} \in \{-1, 1\}^L$,

$$\mathbf{z}' = \mathbf{s} \odot \mathbf{z}, \quad \mathbf{M}' = \begin{bmatrix} \mathbf{m}_0 & s_1 \mathbf{m}_1 & \cdots & s_L \mathbf{m}_L \end{bmatrix}.$$

This leaves the full posterior representation unchanged.

Not causal-order ambiguity

Permutation modes correspond to different causal orderings; sign flips are nuisance label switching.

Per-sample sign alignment

$$d_\ell^* = \arg \max_{d \in [D]} |M_{d,\ell}|, \quad s_\ell = \text{sign}(M_{d_\ell^*,\ell})$$

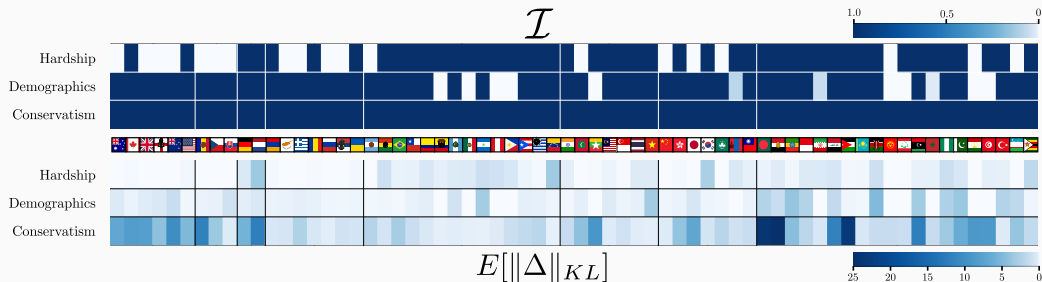
$$\mathbf{z}'_\ell = s_\ell \mathbf{z}_\ell.$$

With ground truth

$$s_\ell = \text{sign}(M_{d_\ell^*,\ell}^*) \text{sign}(M_{d_\ell^*,\ell}), \quad \mathbf{z}'_\ell = s_\ell \mathbf{z}_\ell.$$

All metrics and graphs use the aligned $\mathbf{z}'$ rather than raw $\mathbf{z}$.

APPENDIX: WVS INTERVENTION INDICATORS



Intervention presence

The posterior mean intervention matrix $\mathcal{I}$ gives

$$\Pr(\mathcal{I}_\ell^e = 1 \mid \mathcal{D}),$$

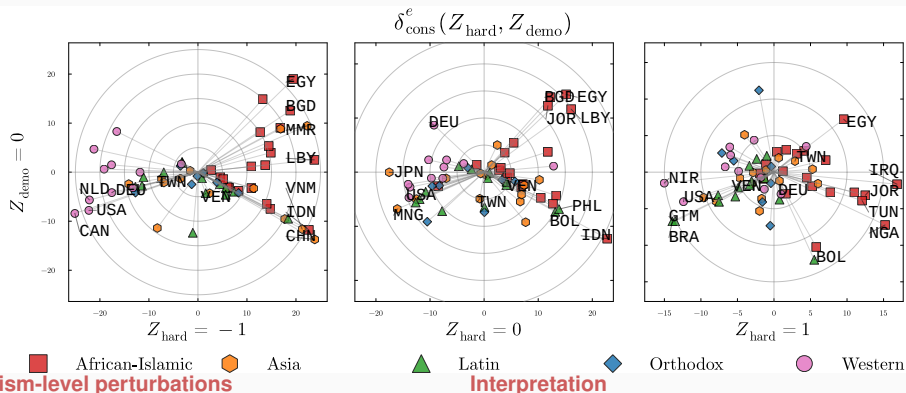
the probability that latent mechanism Z_ℓ is perturbed in country e .

Intervention magnitude

$$\mathbb{E}[\|\Delta_\ell^e\|_{KL}] = \mathbb{E}_{\mathbf{pa}_\ell \sim p^e}[D_{KL}(p(Z_\ell \mid \mathbf{pa}_\ell) \parallel p^e(Z_\ell \mid \mathbf{pa}_\ell))].$$

Many active interventions are small, so effective sparsity is stronger than $\mathcal{I}$ alone suggests.

APPENDIX: WVS INTERVENTION DIRECTIONS



For each country and parent configuration, $\delta_{\text{cons}}^e(Z_{\text{hard}}, Z_{\text{demo}})$ describes how $p^e(Z_{\text{cons}} | Z_{\text{hard}}, Z_{\text{demo}})$ shifts relative to baseline.

Many Western countries show a consistent downward shift in conservatism across parent states; countries such as Taiwan show more heterogeneous direction and magnitude.

$$p_{T_k}(\Phi, \Psi, \mathbf{Z} \mid \mathbf{X}) \propto p(\Phi)p(\Psi)p(\mathbf{Z}, \mathbf{X} \mid \Phi, \Psi)^{1/T_k}, \quad \infty = T_0 > \cdots > T_K = 1.$$

Sequential Monte Carlo Sampler with Likelihood Tempering

Require: Temperatures $\{T_0, \dots, T_K\}$, particles S , and tempered invariant kernels GIBBSUPDATE

1: $(\Phi, \Psi, \mathbf{Z})_0^{(s)} \stackrel{\text{i.i.d.}}{\sim} p_{T_0}(\Phi, \Psi, \mathbf{Z})$ for all $s \in [S]$

2: $w_0^{(s)} \leftarrow 1/S$ for all $s \in [S]$

3: **for** $k = 1$ **to** K **do**

4: Set weights $w_k^{(s)} \propto w_{k-1}^{(s)} \left[p(\mathbf{Z}^{(s)}, \mathbf{X} \mid \Phi^{(s)}, \Psi^{(s)}) \right]^{1/T_k - 1/T_{k-1}}$

▷ Reweight

5: $\{(\Phi, \Psi, \mathbf{Z})_k^{(s)}, w_k^{(s)}\}_{s=1}^S \leftarrow \text{RESAMPLE}(\{(\Phi, \Psi, \mathbf{Z})_k^{(s)}, w_k^{(s)}\}_{s=1}^S)$

▷ Resample

6: $(\Phi, \Psi, \mathbf{Z})_k^{(s)} \leftarrow \text{GIBBSUPDATE}((\Phi, \Psi, \mathbf{Z})_k^{(s)}, T_k)$

▷ Mutate

7: **end for**

8: **return** $\{((\Phi, \Psi, \mathbf{Z})_K^{(s)}, w_K^{(s)})\}_{s=1}^S$

APPENDIX: SMCS DETAILS

Reweighting

$$\tilde{w}_k^{(s)} = w_{k-1}^{(s)} \left[p(\mathbf{Z}^{(s)} \mid \Phi^{(s)}) p(\mathbf{X} \mid \mathbf{Z}^{(s)}, \Psi^{(s)}) \right]^{\frac{1}{T_k} - \frac{1}{T_{k-1}}}$$

$$w_k^{(s)} = \frac{\tilde{w}_k^{(s)}}{\sum_{r=1}^S \tilde{w}_k^{(r)}}.$$

Resampling

$$\text{ESS}_k = \frac{1}{\sum_{s=1}^S (w_k^{(s)})^2}, \quad \text{resample if } \text{ESS}_k < \tau S.$$

We use $\tau = 0.5$ and stratified resampling.

Mutation

After resampling, each particle is moved with Gibbs updates that leave $p_{T_k}(\Phi, \Psi, \mathbf{Z} \mid \mathbf{X})$ invariant.

Posterior approximation

$$p(\Phi, \Psi, \mathbf{Z}^{\mathcal{E}} \mid \mathbf{X}^{\mathcal{E}}) \approx \sum_{s=1}^S w_K^{(s)} \delta_{(\Phi, \Psi, \mathbf{Z}^{\mathcal{E}})_K^{(s)}}.$$

The final particle population represents uncertainty over latent assignments, mechanisms, measurement parameters, and causal ordering modes.