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Bornschieer, Simon

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# Historical Polarization and Representation in South American Party Systems, 1900-1990\*

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## Abstract

Although ideological polarization can create problems for governability and democratic stability, I argue that it also has beneficial effects in new democracies. By clarifying the political alternatives, polarization creates strong links between parties and voters, and thereby instills mechanisms of accountability. These mechanisms force parties to remain responsive to evolving voter preferences. A comparative historical analysis of six South American cases demonstrates that the vast differences in the quality of representation in the 1980s, immediately after many countries in the region returned to democracy, were rooted in an early bifurcation of party systems in the first half of the twentieth century: While prolonged periods of ideological conflict occurred in some countries in this period, polarization was aborted by various means in others. By showing that ideological moderation may help formal democracies to survive, but that aborting conflict in the long run severely hampers key aspects of the quality of democracy, this article suggests a revision of conventional views regarding ideological polarization.

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## Introduction

Party systems in new democracies differ dramatically in their capacity to structure citizen preferences and represent them in the political process, which would be one of the most central goals of popular rule according to democratic theory. In this article, I argue that in the long run, party systems that experienced prolonged periods of ideological conflict differ starkly from those where elites avoided polarization. Contrasting party platforms allow voters to make sense of what politics is about and create strong links between social groups and political parties. If parties retain their spacial positions, ongoing conflict is capable of reproducing alignments over generations, instilling long-term mechanisms of programmatic accountability.

The stark differences in terms of the quality of representation in Latin America provide an excellent context to verify this claim. What is more, a coherent theoretical framework to explain how party systems rooted in ideology emerged in some Latin American countries, but failed to crystallize in others, is still lacking. I argue that the paths between representative and unrepresentative party systems bifurcate when – at different points in the first half of the twentieth century, depending on the country – the left makes its appearance on the political scene. At this point, party systems either became polarized, or saw competition restricted. Parties started offering distinctive platforms along the economic policy dimension early in the twentieth century in Chile and Uruguay, and with the advent of Peronism in Argentina. As I will show, these party systems still stood out in the 1990s in terms of representational quality. The balance of power between left and right is crucial in explaining whether party systems

became polarized or not: Where the established social and political elites felt threatened by leftist parties, they banned challengers, resorted to the military to intervene, or employed clientelistic benefits to de-mobilize newly emerging social groups. Peru is the prime example in this article where elements of all of these strategies were employed in combination. Likewise, pacted transitions back to democracy, such as those that occurred in Colombia and Venezuela in 1958, proved damaging for political representation. What these countries, along with others that I study in less detail – Brazil, Ecuador, Bolivia, and Mexico – have in common, is that they represent instances of what I call “aborted polarization”. As a consequence, responsive party systems either never formed, or parties progressively lost touch with society as they cartelized.

My central claim is thus that the quality of representation – a term I define below – in the 1980s and 1990s, after many countries in Latin America had re-democratized after years of military dictatorships, displayed patterns stemming from a long-term path dependent evolutionary process. Considerable research has addressed changes in Latin American party systems since the 1980s.<sup>1</sup> But with the exception of Kitschelt et al. 's recent book,<sup>2</sup> we lack a comparative account based on a limited set of variables to explain where the initial configuration in the 1980s came from, and what mechanisms underpinned its continuity for much of the early twentieth century. What is more, if the focus is on the impact of historical polarization, continuities actually remain stronger than discontinuities. Out of the eleven countries I study, only

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<sup>1</sup> E.g., Roberts 2013; Roberts 2014; Gibson 1997; Stokes 2001; Levitsky 2003; Handlin 2013; Levitsky and Loxton 2013; Lupu 2014.

<sup>2</sup> Kitschelt et al. 2010a.

Argentina may have jumped off-track by the 2000s. The breakdown of the Venezuelan party system, on the other hand, can be explained by the long-term consequences of the collusive behavior of the major parties.

By demonstrating the merits of polarization, I contradict modernization theorists, proponents of pacted transitions, and other scholars who have championed political moderation as key for democracy.<sup>3</sup> In theory, of course, party positions need not be polarized, but only sufficiently distinct for programmatic alignments and congruent representation to emerge. In reality, however, in the Latin American historical context, challenging parties tended to be highly polarizing. Cases where party systems were not polarized, yet provided voters with identifiable, distinctive policy options, were virtually inexistent – the only partial exception is the Uruguayan case. Given a choice between polarization and the absence of policy-based representation, many students and observers of Latin American politics endorsed polarization-aborting pacts that I show are detrimental for representation. Paradoxically, even the party systems literature, albeit being strongly shaped by Lipset and Rokkan's conflict-based explanation of party system formation, has developed a pro-moderation bias at least since Sartori's influential work on polarized pluralism.<sup>4</sup> At the same time, recent research from the advanced democracies supports my claim that polarization creates, while de-polarization dilutes the links between social groups and parties that have stabilized party systems since the formation of the historical cleavages.<sup>5</sup> Party

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<sup>3</sup> E.g., Lipset 1957; Karl 1986; Mainwaring and Scully 1995, 2; Collier and Collier 2002[1991].

<sup>4</sup> Lipset and Rokkan 1967; Sartori 1976.

<sup>5</sup> E.g., Adams et al. 2011; Evans and de Graaf 2013; for Latin America, see Torcal and Mainwaring 2003.

differentiation also fosters another normative desirable goal: Franklin shows that individuals' propensity to vote is rooted in the degree of polarization they experienced in the first rounds of elections they participated in, and this is one of the most important factors shaping aggregate levels of turnout.<sup>6</sup> Evidence from outside Latin America likewise suggests that if conflict does not surpass a certain threshold, polarization has beneficial effects. Le Bas argues with respect to Africa that polarization results in more cohesive and more socially rooted party organizations.<sup>7</sup> Parties of this kind are necessary for democracy to function.

The remainder of this study is structured as follows. The first section starts out by arguing for the need to move beyond party system institutionalization to meaningfully capture differences between party systems. Although the empirical analysis will be situated at the country level, I then substantiate my claim that polarization is good for representation by presenting an individual-level theory of how this process allows voters to develop partisan attachments, and argue that these attachments force parties to remain responsive to voter preferences even as alignments are reproduced over generations. In the second section, I develop a specific theory for the Latin American context, identifying the conditions under which polarization lasted long enough for this individual-level process to occur and party systems to become anchored in the populace. The bulk of the article is then dedicated to a comparative historical analysis of six cases, which are chosen based on a briefer analysis of eleven South American countries. The predictions derived from this analysis are then used to explain voter-

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<sup>6</sup> Franklin 2004.

<sup>7</sup> Le Bas 2011.

party congruence in the 1990s, employing existing quantitative evidence. In the final section, I discuss rival accounts to my own.

Beyond institutionalization: how congruent representation emerges and perpetuates itself

As the actors linking citizens and the political system, parties play a central role in democratic governance. Indeed, their representative function makes them a key element of democracy itself.<sup>8</sup> A first wave of comparative research that sought to explain differences between Latin American party systems and elsewhere was based on the party institutionalization approach, pioneered by Mainwaring and Scully's seminal book.<sup>9</sup> Dix, Coppedge, and Roberts and Wibbels all set out to explain differences in the degree to which party systems are institutionalized.<sup>10</sup> This perspective makes the problematic assumption, however, that stable party systems tend to offer clearly identifiable policy options, or what Kitschelt terms programmatic linkages.<sup>11</sup> Where programmatic linkages prevail, goods are distributed according to universalistic, publicized criteria and irrespective of whether an individual supported the party that distributes the benefits.<sup>12</sup> But parties can also build a loyal following – resulting in aggregate stability and hence an institutionalized party system – by

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<sup>8</sup> Pitkin 1967; Dahl 1971; Powell 2004; Kitschelt et al. 2010a.

<sup>9</sup> Mainwaring and Scully 1995.

<sup>10</sup> Dix 1989; Coppedge 1998; Roberts and Wibbels 1999.

<sup>11</sup> Kitschelt 2000.

<sup>12</sup> Stokes et al. 2013, 7-10.

distributing particularistic benefits, that is, by building clientelistic linkages. Looking only at institutionalization, then, makes the Chilean, Uruguayan, Colombian, and Venezuelan party systems appear similar for much of the twentieth century. But these party systems could hardly look more different in the degree to which they offered divergent policy options and in their capacity to respond to popular demands.

If the quality of representation is the dependent variable, then the lack of sustained party differentiation – or polarization – goes a long way to explaining why many countries score so low. I define the quality of representation as the degree to which parties represent the programmatic preferences of their voters, resulting in congruence between parties and voters. Polarization is used in accordance with standard language in this article to describe a state of affairs in which left and right parties advocate clearly contrasting policies. These policies need not be radical or extreme – not least because what is considered radical is highly time-specific – but sufficiently distinct, allowing even voters with limited political knowledge to distinguish party platforms. Voters can then form ideological schemas for understanding politics, in Conover and Feldman's terms.<sup>13</sup> These schemas are the individual-level reflection of conflicts that have shaped a society and its party system. Stated this way, it is clear that institutionalization is a necessary, but not a sufficient condition for good representation: For strong programmatic linkages to emerge, the options not only have to be stable, but also represent contrasting policy options. Empirical analyses lend support to this supposition. For instance, Lachat shows that party polarization

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<sup>13</sup> Conover and Feldman 1984.



increases ideological voting.<sup>14</sup> At the system level, the clarity of party positions is a significant predictor of the quality of representation.<sup>15</sup> In an individual-level study of new democracies, Dalton and Weldon find that citizens have the capacity to “learn” partisanship, but only where party systems provide them with the opportunity to do so.<sup>16</sup> Likewise, a thread that runs through the recent volume on voting behavior in Latin America edited by Carlin, Singer, and Zechmeister, is that polarization is an asset to voters, because it allows them to base their vote on group interests, issues, and policy output.<sup>17</sup>

If sustained and institutionalized, conflict based on policy-related polarization results in the crystallization of stable political cleavages. Probably less polarization is necessary to maintain cleavages than to forge them in the first place, but some degree of periodical conflict is necessary to reinforce the political group identities that underlie cleavages, and to stabilize alignments over time.<sup>18</sup> In a classical essay, Converse estimated that, if we “simulate an electorate launched de novo in a party system”, it would take three generations for partisan identification to “mature”.<sup>19</sup> More recently, Dinas has shown that psychological attachments to partisan groups strengthen as voters select the same party over several elections.<sup>20</sup> It is easy to see that

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<sup>14</sup> Lachat 2008.

<sup>15</sup> Dalton 1985; see also Dalton 2008.

<sup>16</sup> Dalton and Weldon 2007.

<sup>17</sup> Carlin, Singer, and Zechmeister 2014.

<sup>18</sup> Sartori 1968; Bornschier 2010, 57-60.

<sup>19</sup> Converse 1969, 146.

<sup>20</sup> Dinas 2014.

this micro-level process can result in the macro-phenomenon that Lipset and Rokkan have famously referred to as the “freezing” of the major party alternatives.<sup>21</sup> The recent literature on the established democracies underscores that political conflict constitutes the reproductive mechanism underlying cleavages, even as they adapt to reflect new issues and concerns.<sup>22</sup> This is particularly true with respect to the socialization of new voters, who become acquainted with the prevailing structure of conflict in the first set of elections in which they participate.<sup>23</sup> At the same time, as the Latin American cases testify, because ideological schemas are social constructs, the structure of conflict can be reproduced in the minds of voters even during phases in which democracy is interrupted by way of political discussion and parental socialization. Obviously, the length of the interruption of the electoral calendar matters for the ability of links between specific social groups and political parties to survive, but so does the initial strength of the cleavage, because strong political sub-cultures are more likely to persist. Drawing on Lupu and Stokes, an important transmitting factor is that the grassroots networks characteristic of ideology-based parties tend to survive authoritarian interludes, and then put established parties at an advantage in perpetuating the structure of conflict from the prior democratic regime once elections are re-established.<sup>24</sup>

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<sup>21</sup> Lipset and Rokkan 1967.

<sup>22</sup> van der Brug 2010; Bornschier 2010; Evans and Tilley 2011; Adams et al. 2011; Evans and de Graaf 2013.

<sup>23</sup> Bartolini and Mair 1990, 218; see also the evidence in Lupu 2013, 56-58.

<sup>24</sup> Lupu and Stokes 2010, 102-103.

From a cleavage perspective, then, it is clear that polarization plays an important role in forming party systems anchored in society. For the most part, however, scholars working on party systems in the developing world have written off the conflict-ridden path of party system formation followed by the established democracies as inappropriate due to the weakness of religious and class identities.<sup>25</sup> At the same time, fears of political instability due to excessive polarization have promoted the idea that successful party system development implies ideological moderation.<sup>26</sup> Thus, although I follow Collier and Collier's analytical approach, and extensively draw on their historical material, we differ in terms of the outcome to be explained.<sup>27</sup> While they are concerned with the viability of formally democratic regimes in the turbulent 1960s and 1970s, I seek to explain the quality of representation after the latest wave of democratization in the 1980s. When the focus is on the quality of representation it becomes clear that ideological moderation comes at the price of fostering party systems that are out of touch with voter preferences. The record of several decades of polarized conflict, on the other hand, helps explain why Chile, Uruguay and Argentina are different from most other Latin American countries.

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<sup>25</sup> Randall 2001.

<sup>26</sup> Hartlyn 1988; Dix 1989; Collier and Collier 2002.

<sup>27</sup> Collier and Collier 2002.

## Applying the theory to Latin America

Under which conditions did ideological conflict persist long enough to foster and then perpetuate congruence in Latin America? Put simply, prolonged polarization requires the prior presence of a strong and unified conservative pole, which subsequently allows for the entry of actors advocating redistributive interests. For the sake of simplicity, I refer to the latter as left-wing parties, although in the Latin American context, this group also comprises cases in which an established party moved to the left to mobilize new social groups (Uruguay), or parties that meshed Socialist and Fascist ideas (an example of the latter type is Bolivia's Nationalist Revolutionary Movement, MNR). In Western Europe, the church-state conflict delivered a first blow on the localized type of clientelistic politics prevalent before programmatic mass politics.<sup>28</sup> In most of Latin America, a similar conflict between Liberals and Conservatives emerged in the nineteenth century, but except for the case of Chile, it was largely pacified when mass suffrage was achieved.<sup>29</sup> For this reason, polarization capable of forming mass alignments occurred only as a result of the mobilization of the left, which in many countries coincided with, or indeed was the cause of, the process of suffrage expansion.<sup>30</sup>

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<sup>28</sup> Caramani 2004.

<sup>29</sup> McDonald and Ruhl 1989; Di Tella 2004; Middlebrook 2000; Hawkins et al. 2010, 242-50.

<sup>30</sup> Rueschemeyer, Huber Stephens, Stephens 1992.

Given the costs of repression and the risk of a radicalization of the politically excluded it entails,<sup>31</sup> conservative elites are likely to tolerate the mobilization of new social segments by parties of the left (or transformed elite parties) if they are confident to be able to defend their vital interests in parliament. Thus, in line with Rueschemeyer, Huber and Stephens' argument, the presence or absence of unified, nationwide conservative or liberal parties to protect such interests was crucial in Latin America.<sup>32</sup> This condition is itself the outcome of the degree of institutionalization of the earlier nineteenth century conflict between Conservatives and Liberals.<sup>33</sup> It is beyond the scope of this article, however, to fully explore this "critical antecedent", a term introduced by Slater and Simmons.<sup>34</sup> Where strong parties defending the interests of political and economic elites allowed for a toleration of the left, this should result in ideological polarization.

But polarization also requires that the major parties of the left and right refrain from forming pacts that limit the scope of policy alternatives that voters are presented with. Pacted transitions to democracy after authoritarian interludes or civil war often exclude or marginalize certain actors, which is damaging for representation. In the short run, pacts may result in certain interests losing representation due to the narrowing down of the policy spectrum. Far more important still are the long-term effects of restricting competition: The marginalization of competitors limits the inducements established parties have to maintain distinctive policy platforms. Without

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<sup>31</sup> Dahl 1971, chap. 1; Boix 2003, 21-46; Bermeo 1997.

<sup>32</sup> Rueschemeyer, Huber Stephens, Stephens 1992.

<sup>33</sup> Gibson 1996; Remmer 1984.

<sup>34</sup> Slater and Simmons 2010.

open contestation, the dynamic of competition changes: A mainstream (center-)left party challenged by a more leftist competitor is likely to lose to this competitor if it moves to the center. If contestation is restricted, on the other hand, left-leaning voters have nowhere else to go. Consequently, center-left parties do not face immediate losses when they collude with their mainstream center-right counterparts and eliminate programmatic distinctiveness. Curtailing competition also destroys parties' incentives to adapt to new social demands. I illustrate these mechanisms in a comparison of the Uruguayan and Colombian cases, but they also help to explain the breakdown of the Venezuelan party system in the 1990s.

Figure 1 shows the four combinations that result from the critical antecedent condition, the strength of the right (first bifurcation), and the critical juncture of polarization vs. aborted polarization triggered by the mobilization of the left (the second bifurcation). The most propitious route to good representation (Route 1) is open only to countries where a balance of power between left and right developed. Extensive phases of open competition and polarization set in motion the process theorized in the previous section, in which ideologically based partisan attachments develop. Pacted transitions to democracy, however, can abort polarization even in cases in which the right is strong, especially in the Cold War context (Route 2). Second most successful is Route 3, where polarization in the absence of a strong protection of elite interests makes democracy fragile, but where partisan identities are sufficiently strong to re-surface whenever open elections are held. This path is unlikely to be very common, but we will see that it was followed by one important case, Argentina. Most widespread in Latin America is Route 4, where the weakness of the right induces established actors to pursue strategies to de-politicize social conflict

or to resort to the military to defend conservative interests. Indeed, the parliamentary right was weak in most countries, as emphasized by students of democratic regime stability and party system formation alike.<sup>35</sup> The difference between Routes 3 and Route 4 is that in the former case, the strategy of de-politicization fails, while in the latter it succeeds.

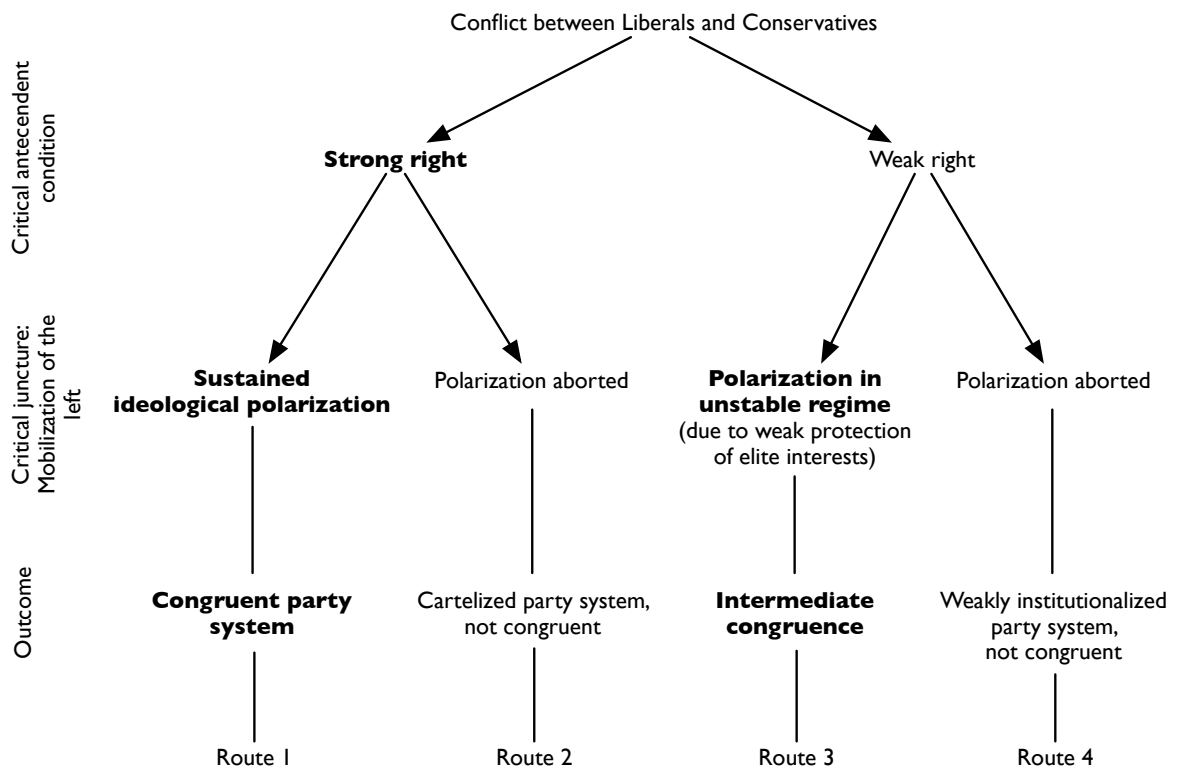


Figure 1: Theoretical map of party system trajectories in Latin America

A final note is in order concerning the relationship between ideology and clientelism. For various reasons, the emergence of programmatic party-voter linkages

<sup>35</sup> Gibson 1996; Rueschemeyer et al. 1992; Geddes 2003, chap. 4; Dix 1989.

does not imply the absence of clientelism, as is born out by recent evidence.<sup>36</sup> Indeed, in the Latin American context, both parties of the left, as well as those on the right are likely to pursue “mixed” mobilization strategies. For one thing, the core constituency of conservative parties being numerically smaller than that of the left, they resort not only to religious and conservative values to mobilize beyond the narrow strata of the upper classes. For another, because left-leaning parties in Chile, Argentina, and Uruguay had access to state resources early on, they do not conform to Shefter’s model of externally mobilized parties, and were able to pursue mixed mobilization strategies as well.<sup>37</sup> But from a normative point of view, mixed mobilization strategies are clearly superior to purely clientelistic ones. Building on Stokes and colleagues’s idea of a “diversity of harms” of clientelism to democracy, particularistic exchanges most severely undermine democracy when they take on a coercive character and impede voters from expressing their policy preferences.<sup>38</sup>

## Research design

A test of the argument put forward in the preceding sections requires a set of countries that exhibit variation in terms of my key independent variables, namely, the strength of the right, the ability of the left to openly compete, and the resulting duration of polarization. Excluding the Central American and Caribbean countries due to their

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<sup>36</sup> Kitschelt and Kselman 2013; Stokes et al. 2013; Luna 2014.

<sup>37</sup> Shefter 1977.

<sup>38</sup> Stokes et al. 2013, chap. 9.



differing socioeconomic structure and their more limited experience with democracy,<sup>39</sup> we are left with eleven potential cases. These cases are listed in Table 1, together with summary information on the key variables in my model and their measurement. The antecedent condition is constituted by the strength of the right prior to the emergence of the left, which strongly determines the establishment's response to the left. Building on Gibson, the key criterion to assess the strength of the right is whether or not a nationalized conservative party predated mass politics, or whether conservative parties were regionally fragmented.<sup>40</sup> Only where the right was united in one or two nationalized parties were they able to effectively defend conservative interests and counter the mobilization of the left. Because Gibson does not extensively document his classification of countries based on this criterion, I draw on further sources to do so in the next section. I also complement the assessment by drawing on the vote share of parties defending conservative interests in the lower legislative chamber immediately prior to the critical juncture for those cases where this information is available from Nohlen.<sup>41</sup> The strength of the right in parliament is crucial because it determines whether conservative forces will be able to block legislation or at least constitutional changes that threaten their interests. Next, Table 1 provides detailed information on the timing of the critical juncture – the emergence of a left-wing actor capable of polarizing redistributive conflicts. The most crucial variable is the length of the ensuing polarization period. Some countries experienced protracted polarization over decades of elections, while in others these episodes were

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<sup>39</sup> Rueschemeyer et al. 1992.

<sup>40</sup> Gibson 1996, chap. 1.

<sup>41</sup> Nohlen 2005.

either inexistent or too short and temporally remote to structure party alternatives in the 1990s, when the dependent variable is measured. Note that polarization does not necessarily arise as an immediate consequence of the extension of the franchise: While it more or less did so in Chile (1918), in Argentina, the polarization phase begins several decades after the introduction of universal suffrage in 1912 because the growth of the Radicals that occurred after the extension of the franchise did not strongly polarize the economic dimension of conflict.<sup>42</sup> Finally, Table 1 indicates the predicted outcome of the critical juncture, namely, the level of congruence between voter preferences and party positions in the 1980s and 1990s. While the next section tracks the evolution of six party systems along the routes of polarization and aborted polarization using comparative history, Appendix A in the online supporting material to this article discusses the classification of all eleven countries and the timing of the antecedent and polarization phases in more detail than is possible here.

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<sup>42</sup> Rueschemeyer et al. 1992, 179.

Table 1: Summary of independent variables, expected outcomes, and case selection

Case	<i>Critical antecedent</i>				<i>Critical juncture</i>			<i>Outcome</i>
	Strength of elite parties	Conservative parties at national level	Time of measurement	Vote share <sup>a</sup>	Agent of polarization	Polarization phase	Event that ends polarization	Predicted level of congruence post-1980s
<i>Selected cases</i>								
Chile	strong	Conservatives + Liberals	1891-1960s	38.8% (1915-1921)	Communists + Socialists	1932-1973 <sup>b</sup>	Coup	high
Uruguay	strong	Blancos (Nationals)	pre-1903	42.3% (1917-1931)	Colorado Party	1904-1973 <sup>c</sup>	Coup	high
Colombia	strong	Conservatives	1902-1930	39.4% (1931-1949 as proxy)	Liberals launch appeals towards lower classes	1930-1948	Elite pact after civil war	low
Venezuela 1940s	weak	none	pre-1945	–	Acción Democrática	1945-1948	Coup	–
post-1958	strong	COPEI, URD	1958 <sup>d</sup>	42% (1958)	–	–	Elite pact	low
Argentina	weak (regionally divided)	Conservador, Demócrata Progresista	1916-1928	14.4% (1916-1928)	Peronism	1946-1955, 1958-1966, (1973-1976) <sup>e</sup>	Repeated military coups	intermediate
Peru	weak (regionally divided)	None after 1919-1930 dictatorship	pre-1930	–	APRA	1931-1956 <sup>f</sup>	Party collusion	low

*Other countries (excluding Central America)*

Ecuador	intermediate <sup>g</sup>	PCE, Liberals (PLR)	pre-1930s	44% (1946-1954) <sup>h</sup>	None <sup>i</sup>	–	–	low
Paraguay	strong	Colorados and Liberals	1887-1937 <sup>j</sup>	n.a.	None	–	–	low
Mexico	Elite comp. not institutionalized	none	pre-1911	–	Mexican revolution	1917-1946	PRI establishes hegemony	low
Bolivia	weak	Several Cons. + Liberal parties	pre-1938	n.a.	Nationalist and internationalist left parties	1938-1952 <sup>k</sup>	1952 Revolution	low
Brazil	weak (regionally divided) <sup>l</sup>	none	1889-1945	–	President João Goulart moves Brazilian Labor Party (PTB) to the left	1961-1964 <sup>l</sup>	Coup	low

Notes

*a* Based on earliest data available from Nohlen (2005). I have included all parties that reach vote shares of at least 10% and defend economic elite interests.

*b* Polarization begins after 1924-32 authoritarian interlude, vote share of the left very restricted before. See text and online documentation.

*c* José Batlle y Ordóñez moved the Colorado party to the left a year after winning the presidency in 1903 (Collier and Collier 2002: 127, 273). The authoritarian backlash in 1933 was an explicit reaction against the social reforms inaugurated by the Colorados (Rueschemeyer et al. 1992: 209-210), and since parties were not prohibited during authoritarian rule, partisan conflict arguably persisted even during 1933-1942 authoritarian interlude (Collier and Collier 2002: 444-456).

*d* No competitive elections were held between 1948 and 1958. The vote share of the right in 1958 shows that conservative parties nonetheless deepened their roots in society during this period. Furthermore, the right was an important actor in the negotiated transition back to democracy (Bejarano 2011: chap. 3).

*e* The period after Perón's return to power in 1973 was not characterized by strong inter-party polarization (see main text and online documentation).

*f* Polarization phase stretches from first elections after founding of APRA until the party's first alliance with the right.

*g* Conservative party strength classified as intermediate due to relatively high pre-1930 vote share, but manifest inability to compete with populist challengers.

*h* PCE and PLR combined.

*i* José María Velasco Ibarra's repeated challenge to the political establishment from the 1930s onwards was largely devoid of ideology, and none of his elections resulted in a major policy shift, as documented in the online supporting materials.

*j* Refers to period between founding of the Colorado and Liberal parties until first of a series of military coups that lead up to Alfredo Stroessner's dictatorship (1954-1989). See online supporting material for discussion of challenges to the established parties in the 1930s.

*k* Polarization phase begins after Constitution of 1938 and ends when Nationalist Revolutionary Movement (MNR) establishes hegemony after Revolution of 1952 (see online documentation).

*l* See online supporting material for detailed assessment.

In selecting cases for the comparative historical analysis, I start out by choosing four cases featuring a strong right in order to flesh out the importance of the interaction between the strength of the right and the role of the left. By the standards set out in Table 1, Chile, Uruguay, Colombia and Venezuela clearly featured strong conservative parties or coalitions prior to the emergence of the left. Two of these, Chile and Uruguay, experienced prolonged party system polarization. I include both because Chile is the classical case of a party system polarized along the economic left-right divide, while this claim is more controversial in the Uruguayan case. My analysis will show, however, that despite the differences in the make-up of their party systems, these cases share important commonalities in terms of my independent variables that result in a similar outcome. The selection of Uruguay is also important because of it allows me to include a most similar systems comparison, which is nested within the most different systems design: The origins of the Uruguayan and the Colombian party systems are remarkably similar, but the paths these countries followed bifurcated when it comes to the persistence of polarization. On the other hand, Colombia shares the important commonality with Venezuela that polarization was aborted as a result of their pacted transitions back to democracy in 1958. The inclusion of both cases with pacted regime transitions underlines that such agreements may result in deviations from the polarization path despite the existence of a strong right-wing conservative party with a nationwide organization (the critical antecedent). Furthermore, the rather sudden breakdown of the Venezuelan party system has proven difficult to account for by scholarship within the party system institutionalization approach, while it is easily explained using my framework.

I then select two cases with a weak right, one of which – Argentina – nonetheless saw prolonged periods of polarization. I focus on the Peronist phase, rather than the challenge to the traditional political and landowning elite launched by the Radicals from the 1880s onwards because the Peronists polarized the party system much more strongly along the economic dimension of conflict, as noted above.<sup>43</sup> In Peru, on the other hand, polarization was aborted, as was the case in Brazil, Bolivia, and Mexico, countries that also followed Route 4 in Figure 1. As indicated in Table 1, the predicted outcome in all these cases except Argentina is a low level of congruence in the 1980s and 1990s. Among the countries that never experienced significant polarization or saw it aborted, Peru is particularly interesting to single out because of the similarities it shares with Argentina. Certainly, Argentina and Peru always differed fundamentally in economic structure and the level of modernization, yet the nature and scope of left-wing mobilization they experienced in the 1940s was comparable. Collier and Collier extensively highlight these commonalities, and indeed analyze the two countries using paired comparison.<sup>44</sup> My analysis highlights a crucial difference between Argentina and Peru, namely, the degree to which these countries experienced prolonged polarization. Note that this contrast, in turn, may be partly due to the capacity of the Argentine labor movement to resist repression, which is related to the more industrialized nature of the Argentine economy. This does not, however, suggest an alternative causal mechanism to explain long-term differences in the quality of representation: Indeed, the structural factors along which Argentina and Peru differ played out exactly through the political variables I focus on. The causal

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<sup>43</sup> See Appendix A in the online supporting material for a more extended discussion.

<sup>44</sup> Collier and Collier 2002, 316-350, 469-497.

relationships between political and structural variables are discussed in more detail towards the end of this article.

None of the countries excluded from the more in-depth analysis presents a problem for my theory. The phases of polarization in Mexico, Bolivia, and Brazil were far too short and historically remote to anchor the party system in the populace and shape voters' interpretation of politics towards the end of the twentieth century. Aided by the weakness of the right, revolutionary movements became hegemonic in Mexico and temporarily in Bolivia, on the other hand, underscoring that a balance of power between left and right is necessary to keep polarization alive. Ecuador and Paraguay, finally, did not witness significant ideological party system polarization until very recently, which was to a large degree the consequence of the weakness of the left.

#### Comparative historical analysis

To guide the comparative analysis of the six cases singled out for detailed examination, Figure 2 presents a summary of the research design and of the results of the analysis. The explanatory variables are the presence or absence of a strong party of the right (the critical antecedent condition), and whether prolonged party differentiation occurred or not following the critical juncture. The outcome to be explained is indicated at the bottom of the figure: the congruence between party positions and voter preferences in the 1980s, after the most recent wave of democratization. Figure 2 thus differs from Figure 1, which presented the general

theory, in that it presents a more detailed summary of the actors and strategies involved in the processes of polarization and aborted polarization.

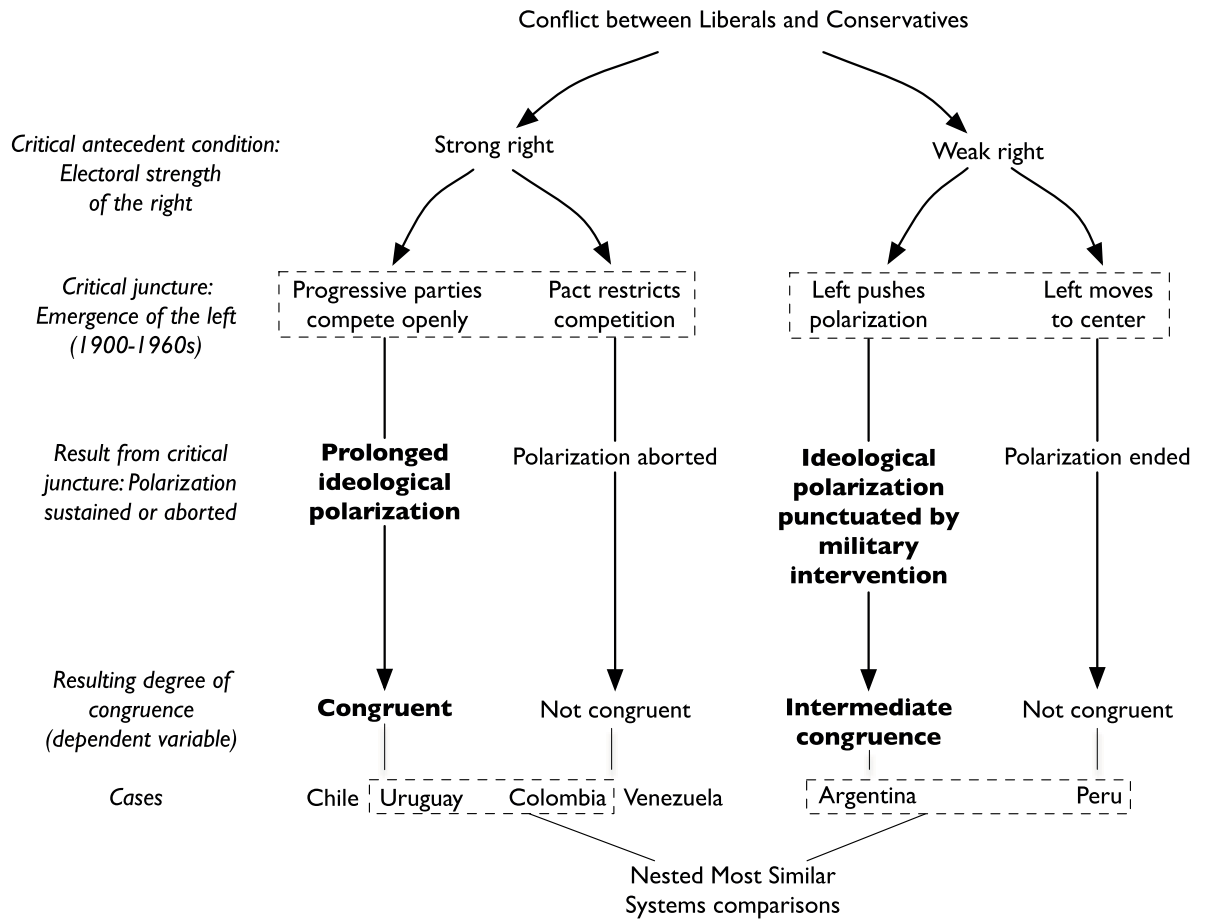


Figure 2: Summary of country trajectories resulting from the strength of the right and the mobilization of the left



*Left-wing polarization in Chile and Uruguay, and aborted polarization in Colombia*

The Chilean and Uruguayan trajectories show the ideal-typical case of a strong right and a strong left that offered voters clear alternatives and whose balance of power allowed both open competition and polarization to be sustained for several decades until the military coups of the 1970s. Polarization occurred in two steps in Chile, and the strong protection of elite interests during the first phase was propitious for the formation of partisan alignments. In Chile's "Parliamentary Republic" of 1891, a competitive party system and a nationwide religious cleavage had emerged. This history of early institutionalized conflict endowed Chile with strong Conservative and Liberal parties that until the early 1970s proved capable of securing the interests of the upper classes.<sup>45</sup> From the 1920s onwards, the mobilization of the Communist and Socialist left fundamentally transformed the party system.<sup>46</sup> While left-wing participation in coalition governments between 1938 and 1948 produced rather disappointing results for the working class, the left moderated somewhat in terms of rhetoric, but not substantially.<sup>47</sup> The oligarchy remained in a strong electoral position until the 1950s due to its clientelistic control of the vote of the rural population.<sup>48</sup> The second phase of polarization was inaugurated when the Christian Democrats started mobilizing rural laborers in the late 1950s, socializing larger segments of the population into ideological party politics. As continued mobilization in the

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<sup>45</sup> Scully 1992, 62-170; Collier and Collier 2002, 100-113; Rueschemeyer et al. 1992, 191-2; Gibson 1996, 33-4.

<sup>46</sup> Scully 1992, chap 3.

<sup>47</sup> Drake 1978, 176-181, 254-7.

<sup>48</sup> Collier and Collier 2002, 104, 107.

countryside and urban shantytowns eroded vertical patron-client relationships, the Conservatives and the Liberals first responded by fusing into the National Party in defense of conservative interests.<sup>49</sup> When the left won the presidency and the legislature majorities resulted in stalemate, non-electoral cycles of mobilization and counter-mobilization intensified.<sup>50</sup> In the end, the right abandoned its support for the democratic regime: In 1973, a military coup ended Chile's impressive record of uninterrupted elections that had begun in 1932. When the military regime stepped back from power, it turned out that that the balance of power between the left and right had not changed. I thus expect high levels of congruence in Chile in the post-Pinochet phase.

Uruguay and Colombia represent critical cases for my argument since they share strikingly similar features in terms of their pre-democratic order and the make-up of their two-party systems until the 1960s. At the elite level, a pluralistic order was facilitated by two factors. First, the two camps were of similar strength, and thus unable to defeat one another in the days of civil war. Secondly, the oligarchy was divided and represented in both of the traditional parties.<sup>51</sup> Most importantly, in both Uruguay and Colombia, one of the traditional parties moved to the left to attract working-class and other left-leaning voters. But while the Liberals in Colombia moved back to the center after the Civil War, the Colorados in Uruguay maintained a

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<sup>49</sup> Valenzuela 1977; Scully 1992, 106-170; Rueschemeyer et al. 1992, 180; Coppedge 1998, 183.

<sup>50</sup> Bermeo 2003, 138-176.

<sup>51</sup> González 1991; Wilde 1978; Coppedge 1998, 177-180.

left-wing profile until the growth of the Frente Amplio in the 1960s. While Collier and Collier's comparison emphasizes these similarities between Uruguay and Colombia,<sup>52</sup> the two countries diverge at the critical juncture postulated by my model, explaining patterns of representation from the 1960s to this date. As a consequence, these two party systems could hardly look more different today.

In Colombia, the progressive turn of the Liberals destabilized the traditional arrangement between Liberals and Conservatives, involving shared patronage resources to rally support, and ultimately ushered in the 1948-1958 civil war known as "La Violencia".<sup>53</sup> To end the fighting, the "National Front" was established in 1958, a constitutional provision in which the Liberals and the Conservatives agreed to refrain from polarization, to alternate in the presidency, to distribute bureaucratic posts outside the civil service equitably, and to exclude all other parties from competing.<sup>54</sup> While the left itself was too weak to forcefully demand its inclusion, the Cold War political climate produced powerful pressures from within and without the country to outlaw the Communists, marginalizing the left.<sup>55</sup> In the resulting façade democracy, local political bosses obtained a vital role in distributing patronage and in securing the loyal vote for the regime.<sup>56</sup> Consequently, Colombia represents an instance of cartelization, where the established parties jointly exclude challengers, either by an outright ban, as was the case until 1978, or by their privileged access to

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<sup>52</sup> Collier and Collier 2002, 124-5, 748.

<sup>53</sup> Collier and Collier 2002, 312-3, 458; Wilde 1978; Bejarano 2011, 123.

<sup>54</sup> Hartlyn 1988, 54-65; Martz 1997, 35; Di Tella 2004, 94-6.

<sup>55</sup> Bejarano 2011, 90-129.

<sup>56</sup> Wilde 1978; Martz 1997; Archer 1995; Hartlyn 1988; Collier and Collier 2002, 671-3.

state resources, the strategy they continued to pursue thereafter. Only in the recent years did the established parties see a gradual erosion of their dominant position. For the post-1980s period, I expect the Colombian party system to be rather institutionalized due to a history of cartelization, but to display low levels of congruence.

In Uruguay, on the other hand, polarization was sustained, and there was never a pact or an agreement to limit the choice of policy options, as Collier and Collier themselves highlight.<sup>57</sup> Crucially, the established parties did not outlaw the Communists, which they did in Colombia. The adoption of legislation in favor of the working class by the Colorados provoked a strong conservative counter-reaction, and an authoritarian interlude between 1933 and 1942. But contrary to what was the case for pro-labor parties in Colombia, Venezuela, Peru, and Mexico, the Colorado Party in Uruguay did *not* move back to the center, as Collier and Collier's comparative case studies impressively show. While progressive elements were expelled from the parties that had incorporated the working class in all the other cases studied by Collier and Collier, the Colorados in Uruguay tellingly chose not to do so for fear that they would join the left-wing opposition.<sup>58</sup> Thus, the presence of the Communists was crucial, although the Colorados retained the overwhelming share of the left-wing vote until the 1960s. Indeed, Coppedge's expert survey reports contrasting positions for the Colorados and Blancos until 1966.<sup>59</sup> Certainly, clientelism played a major role in Uruguayan politics until the 1960s, but González argues convincingly that politics in

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<sup>57</sup> Collier and Collier 2002, 453-6.

<sup>58</sup> Collier and Collier 2002, 454.

<sup>59</sup> Coppedge 1997.

Uruguay cannot have been only a matter of clientelism, as some would have it.<sup>60</sup> Rather, the cases of Uruguay and Chile defy the notion of a direct and linear trade-off between clientelistic and programmatic linkages.<sup>61</sup> When the Colorados moved to the center in the mid-1960s, the Frente Amplio, which united the Communists, the Christian Democrats, and progressive lists from within the traditional parties, polarized the party system anew.<sup>62</sup> While non-electoral mobilization and polarization in public spaces – not so much in the party system, as Bermeo demonstrates<sup>63</sup> – ultimately resulted in a military coup, it is striking to which degree partisan alignments survived the harsh military dictatorship that lasted from 1973 to 1984: In the first elections after re-democratization, the party system re-surfaced virtually unchanged, the volatility between the 1971 and the 1984 elections being limited to 5.2%.<sup>64</sup> This is strong evidence for robust links between social groups and political parties that keep parties responsive to voter preferences.

#### *Venezuela's pacted democracy and the end of polarization*

The early trajectory of the Venezuelan party system was markedly different from the Colombian one. What these two countries have in common is that pacts between the left and right aborted polarization. The Pact of Punto Fijo that Acción Democrática (AD) and the Comité Político Electoral Independiente (COPEI) agreed upon in 1958

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<sup>60</sup> González 1991, 25-8.

<sup>61</sup> Luna 2014.

<sup>62</sup> González 1991, 128; Collier and Collier 2002, 643-648.

<sup>63</sup> Bermeo 2003, 100-137.

<sup>64</sup> McDonald and Ruhl 1989, 104.

to re-establish democracy was less rigid than the National Front in Colombia, as it did not outlaw all opposition parties.<sup>65</sup> Nonetheless, the outcome was similar in that programmatic distinctiveness was lost, and in that politics centered almost exclusively on the distribution of clientelistic benefits. After AD had been ousted from power at the end of its three-year rule between 1945 and 1948, its main goal in 1958 was to make stable democracy possible by avoiding the polarization that had led to the 1948 coup. Indeed, Venezuela's "pacted democracy" that extended from 1958 to the 1990s is often considered a success story and a model for the viability of democracy in the unstable 1960s and 1970s.<sup>66</sup>

The result of the Pact of Punto Fijo was an effective de-politicization of economic policy issues, aided by the wealth created by oil. Originally together with a third party, AD and COPEI agreed on a number of policy principles, as well as to share both power and patronage resources such as "(...) access to state jobs and contracts, a partitioning of ministries, and a complicated spoils system which would ensure the political survival of all signatories".<sup>67</sup> Although the Communists had been part of the coalition demanding the return to democracy, they were excluded from the agreement, and were banned in 1962 due to their armed resistance against the regime. AD and COPEI came to dominate not only the electoral arena, but also civil society, co-opting all independent organization. Clientelism became rampant, and parties no longer exhibited contrasting policy profiles.<sup>68</sup> Although open contestation was re-established

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<sup>65</sup> Bejarano 2011.

<sup>66</sup> E.g., Karl 1986; Collier and Collier 2002; but see Coppedge 1994 for a more critical view.

<sup>67</sup> Karl 1986, 213.

<sup>68</sup> Coppedge 1994, 18-46, 136-52; Roberts 2003; Lyne 2008; Ellner 2008.

in 1968 and left-wing opposition parties re-emerged, AD and COPEI's capacity to deliver particularistic benefits allowed the duopoly to govern the country for another three decades. This situation was similar to the one in Colombia immediately after the end of the National Front in 1978, although the Colombian party system de-institutionalized more rapidly. After the drying up of the resources to fuel AD and COPEI's clientelistic networks in the 1980s, and their ever more collusive behavior in the 1990s, both traditional parties in Venezuela broke down in the election that brought Hugo Chávez to power.<sup>69</sup> The data from the 1990s, shortly before Chávez' first presidential bid, will allow me to verify the hypothesis that the Venezuelan party system lacked programmatic responsiveness, thereby enabling an outsider to win the presidency.

*Polarization that persists and polarization that ends: Peru and Argentina*

Peru and Argentina are countries with left-wing or progressive movements capable of winning popular majorities. Because pre-democratic elites had not succeeded in overcoming their divisions, conservative parties had remained regionally based.<sup>70</sup> Due to the military's capacity and will to prevent progressive movements from gaining power, the outcome was a long history of military involvement in politics. The crucial difference between the two cases, as can be seen in Figure 2, is that Peru's Popular Revolutionary American Alliance (APRA) moved to the center in an illusive quest to gain acceptance by the military establishment, while the Argentine Peronists

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<sup>69</sup> Roberts 2003; Lupu 2014.

<sup>70</sup> Gibson 1996, chap. 1-2; Di Tella 2004, 8.

stubbornly pushed polarization. Thus, for all the structural differences in the economies of these two countries, in political terms, Argentina and Peru constitute a most similar systems comparison, as they differ in terms of the durability of the polarization triggered by the left.

Peru's APRA was founded in 1924. The party forged close ties to the union movement and became the dominating force on the left, outflanking the Communist party. With no party to defend conservative interests in the electoral arena, however, the military intervened continuously whenever it saw the vital interests of the oligarchy as threatened.<sup>71</sup> Although APRA's programmatic stance had been less radical than that of its counterparts in Mexico, Venezuela, and Bolivia from the start, according to Collier and Collier, the only way for APRA to have a chance in governing was to moderate its profile even more, and to form alliances with right-wing parties to ensure civilian rule.<sup>72</sup> Ultimately, this resulted in the adoption of rather conservative positions and in the watering down of the party's ideological profile. APRA's move away from the left and the coming to power of a reformist military government in 1968 then created ample space for revolutionary parties that flourished in the 1970s. After uniting in the Izquierda Unida in the early 1980s, the coalition collapsed a few years later, however, due to internal contradictions, including the response to give to the Shining Path adopting a strategy of armed political struggle against the state.<sup>73</sup> In the poor urban neighborhoods, neither APRA, nor the new

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<sup>71</sup> Rueschemeyer et al. 1992, 193-4.

<sup>72</sup> Collier and Collier 2002, 476-483.

<sup>73</sup> Roberts 1998, chap. 7-8.



parties of the left had succeeded in supplanting the dominant clientelistic networks.<sup>74</sup> But re-democratization did not reverse Peru's historical legacy of aborted polarization: The 1980s were marked by high levels of volatility, as successive center-right and APRA administrations suffered devastating setbacks after their terms in office.<sup>75</sup> Although APRA had moved back to the left under Toledo, and won the 1985 presidential elections, the party was unable to consolidate its success due to Toledo's failure to resolve the economic crisis. The fact that Alberto Fujimori was able to win the presidency in 1990 without being backed by an established party underscores that no stable links existed between social groups and parties in Peru.<sup>76</sup> In the 1990s, I therefore expect low levels of congruence between parties and voters.

Despite the threat that democracy may be overturned, the Peronist party in Argentina never moderated its programmatic position after its sudden rise in the 1940s, nor did it form alliances with political opponents. While some would claim that Peronism did not have a left-wing ideology, the Peronist-anti-Peronist antagonism in fact represents a sectoral divide: Peronism pulled protectionist segments of the rural elites into an alliance with the urban working class and other social groups.<sup>77</sup> Peron's early redistributive economic policies and the attainment of full employment made his party attract urban working class voters exhibiting a clear ideological profile.<sup>78</sup> According to Collier and Collier, Perón's first presidency

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<sup>74</sup> Hilliker 1971; Stokes 1995, 16-31.

<sup>75</sup> McDonald and Ruhl 1989, 214-5, 220; Roberts 1998, 220, 234.

<sup>76</sup> Roberts 1998, 201-203, 233-268.

<sup>77</sup> Gibson 1996, 62-6; O'Donnell 1999.

<sup>78</sup> Madsen and Snow 1991, 102-33.

constituted a “...dramatic shift away from earlier patterns of state-labor relations to one in which, in symbolic and ideological terms, the government dramatically sided with the working class”.<sup>79</sup>

In comparison, the phases of polarization were considerably shorter in Peru than in Argentina. In Argentina, Peronist and anti-Peronist identities were reinforced by political conflict during the entire phase between 1946 and 1966, the advent of the first bureaucratic-authoritarian regime.<sup>80</sup> In Peru, the polarized election of 1931 was immediately followed by the repression of APRA. Due to Peronism’s penetration of the militant labor movement, polarization was also maintained during phases in which the party was banned, as between 1955 and 1966.<sup>81</sup> Consequently, the Peronist party kept its distinctive programmatic profile and retained a loyal constituency even under periods of dictatorship, as Lupu and Stokes show.<sup>82</sup> Another key difference between Argentina and Peru lies in the presence of the Radicals, a strongly institutionalized middle-class party that came to unite the anti-Peronist opposition. Thus, Lupu and Stokes present evidence that despite the weakness of conservative interests in the party system, the Argentine party system was polarized along class lines from 1946 onwards.<sup>83</sup> While democratic competition remained fragile and was punctuated by

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<sup>79</sup> Collier and Collier 2002, 314-5.

<sup>80</sup> The short-lived democratic regime between 1973 and 1976 is unlikely to have reinforced partisan identities, as Perón sought compromise with the right, and as strong centrifugal tendencies tore the Peronist movement apart.

<sup>81</sup> O’Donnell 1979, chap. 4; Collier and Collier 2002, 358-9, 484-97, 721-42.

<sup>82</sup> Lupu and Stokes 2010.

<sup>83</sup> Lupu and Stokes 2009.

military intervention, ideological conflict nonetheless became institutionalized and created strong and enduring political identities. When the military regime was toppled in the early 1980s, not only did the pre-coup party system re-emerge; party support continued to be clearly structured by social class in the 1983 elections.<sup>84</sup> Due to the limited periods of open contestation, but high levels of polarization, I expect at least intermediate levels of voter-party congruence for Argentina in the 1990s.

Testing the predictions: Patterns of party system institutionalization and the quality of representation in the 1990s

In this section, I use available quantitative evidence that confirms the impact of the critical juncture in my model on party systems after the wave of re-democratization in the 1980s. I started out by arguing that party system institutionalization is a necessary, but not a sufficient condition for responsiveness. To substantiate this argument, I locate countries along the dimensions of party system institutionalization and the party-voter congruence. To measure party system institutionalization, I use Mainwaring and Scully's overall measure for the period from the early 1980s to the early 1990s.<sup>85</sup> The assessment of party system congruence after re-democratization, my key dependent variable, would ideally rely on data from the 1980s. While we lack suitable data from this period, Luna and Zechmeister's seminal article offers an

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<sup>84</sup> Di Tella 2004, 164-70; Madsen and Snow 1991, 134-50; McGuire 1995, 233-6.

<sup>85</sup> Mainwaring and Scully 1995, 17.

assessment of congruence for the late 1990s.<sup>86</sup> Their measure of congruence is based on the correspondence between voter preferences and party positions across a number of issue bundles including economic and religious issues, preferences for a democratic regime, law and order, and good governance. Because Luna and Zechmeister's measurement does not include Peru and Venezuela, I impute values for these two countries using Kitschelt et al.'s index of "programmatic partisan structuration", which combines Luna and Zechmeister's original measure with several additional components measuring the clarity of partisan alternatives.<sup>87</sup> The high correlation between the two indices and the computation of the imputed values is documented in the online supporting material to this article (Appendix B).<sup>88</sup>

Figure 3 plots party system institutionalization and programmatic partisan structuration against each other. This results in four possible combinations, three of which are likely to be empirically populated: institutionalized congruent party systems, institutionalized non-congruent systems (based on stable patron-client relationships), and non-institutionalized systems (which may be a reflection of competitive or personalistic patron-client relationships). Because institutionalization is a prerequisite for congruence, a non-institutionalized congruent party system is unlikely to exist.

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<sup>86</sup> Luna and Zechmeister 2005.

<sup>87</sup> Kitschelt et al. 2010a, 171.

<sup>88</sup> Paraguay is the only country from Table 1 that cannot be located because it is included in neither of the two data sources.

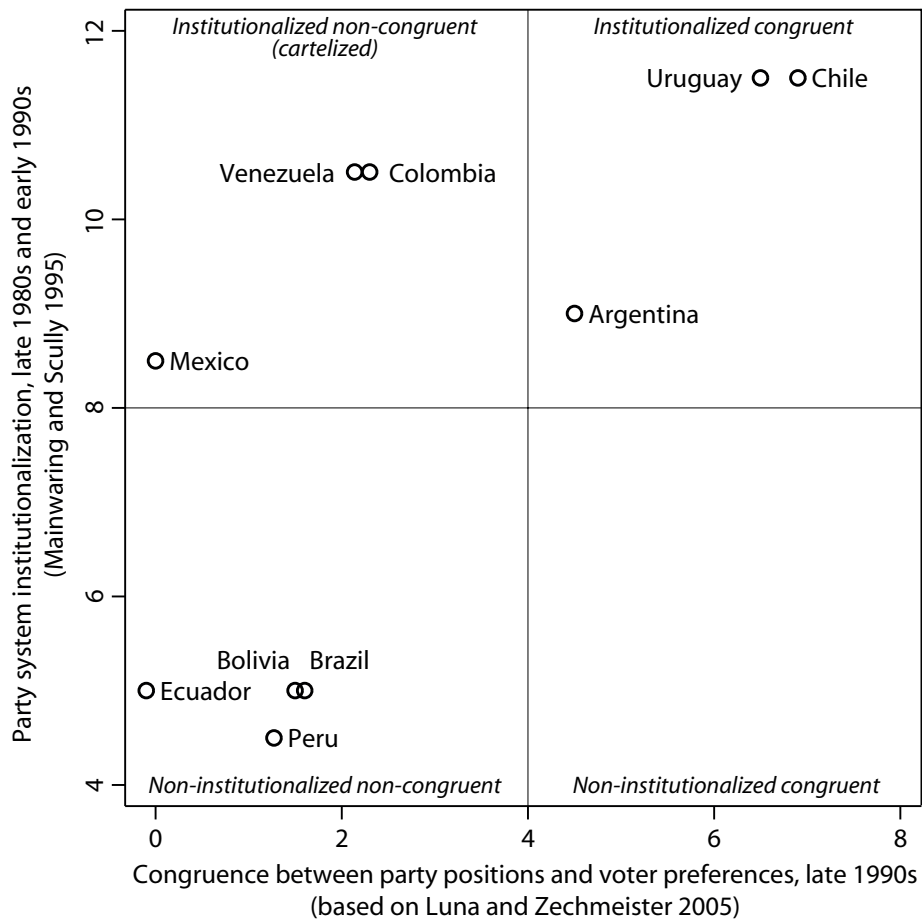


Figure 3: Party system institutionalization and voter-party congruence in the 1980s-1990s

In line with expectations, Chile and Uruguay exhibit highly institutionalized party systems that closely mirror voter preferences. Both countries are situated close to the conceptual maximum on both scales. Argentina, on the other hand, is also located in the upper right quadrant, but takes a more intermediate position with respect to both measures. This is the expected outcome of the strong political identities resulting from the long-term conflict between Peronists and Radicals, but the more limited experience of open democratic elections. Peru, on the other hand, a case of aborted

polarization, is characterized by similarly low performance both in terms of institutionalization and congruence (lower left quadrant). As predicted, three other cases of aborted polarization from Table 1 – Ecuador, Bolivia, and Brazil – are also located in this quadrant. Finally, the presence of cases in the upper left quadrant underscores that party system institutionalization cannot be equated with congruence. Both Venezuela and Colombia were governed by party cartels since the late 1950s that distorted the “playing field”<sup>89</sup> between the traditional parties that enjoyed access to clientelistic resources, and a fragmented opposition that did not. Similarly to Mexico, they exhibit high stability, but score far lower in terms of the quality of representation than the polarization cases. For all the similarities between the Colombian and the Uruguayan party systems up to the 1940s, these two countries differ in terms of the polarization they experienced since the late 1950s.

### Rival explanations

The preceding section has shown that my historical model explains the quality of representation in the 1990s well. How does my account and the evidence presented here compare to alternative explanations? I discuss three related arguments. The first states that historical factors no longer matter after a so-called “neo-liberal critical juncture”, and that more proximate factors than those analyzed in this article in fact explain differences between party systems in Latin America. The second argument focuses on the role of the welfare state, while the third emphasizes the role of

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<sup>89</sup> Levitsky and Way 2010.

modernization. Starting with the first argument, Kenneth Roberts draws the difference between labor mobilizing party systems that feature strong working-class parties with links to organized labor, and those party systems in which elite parties remained largely unchallenged.<sup>90</sup> In this and a later article and a book, he argues that these historical imprints have been erased by the advent of neo-liberalism in the 1980s.<sup>91</sup> I suggest that the historical imprint must be conceived differently. What matters for the socialization process that forges strong programmatic linkages between parties and voters is not simply the presence of a strong left, but polarization within the party system – which was by no means the logical consequence of the presence of strong labor parties. Chile and Argentina experienced protracted polarization, but Peru did not. The same applies to Brazil, Bolivia, and Mexico, which also form part of Roberts’ category of “labor-mobilizing party systems”. In the absence of a strong right, the left was unable to polarize the political space in the latter cases. And finally, Uruguay’s party system is strongly representative of voter preferences despite the historical weakness of the left, because polarization occurred between the established Colorado and Blanco parties.

My argument is not that the betrayal of voters that occurs when a left-wing party promises leftist policies in its campaign, but then pursues market liberalization once in office – what Stokes refers to as “policy switching” and Roberts as a “dealigning critical juncture” – does not have the capacity to disrupt voter-party linkages.<sup>92</sup> But a look at Roberts’ systematic assessment of this phenomenon in Latin America shows

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<sup>90</sup> Roberts 2002.

<sup>91</sup> Roberts 2013; Roberts 2014.

<sup>92</sup> Stokes 2001; Roberts 2013; Roberts 2014.

that voter betrayal occurs chiefly in cases that had experienced aborted polarization earlier on, and already exhibited low levels of congruence between party positions and voter preferences.<sup>93</sup> In fact, where strong ideological ties between parties and social constituencies exist, parties know that policy switching is devastating in electoral terms. With respect to my polarization cases, Roberts shows that both the left and the right remained true to their ideological credentials during the period of neoliberal reform in Chile and Uruguay. Indeed, the left's opposition against the neoliberal reforms pursued by the military regimes in Chile and Uruguay reinforced the older antagonism between the left and right in these party systems. However, the neoliberal critical juncture model does not provide an explanation for the de-institutionalization of the Colombian party system, where market reform was pursued by the right, and thus should not have disrupted partisan alignments.<sup>94</sup>

This leaves us with Argentina as the only case that may have partially deviated from its historical path (keeping in mind that I predicted only intermediate levels of congruence for this case). But even here the evidence supports my argument. The Peronists' move to the right in pursuit of market reform under Menem in the 1990s is a prime example in Stokes' analysis of policy switches.<sup>95</sup> Interestingly, as the results for congruence in Figure 3 show, this did not exceedingly damage representation in the short run. A more detailed analysis reveals that the Peronists succeeded in pulling their electorate to the right, making it follow the party's shift.<sup>96</sup> This is evidence of the

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<sup>93</sup> Namely, Peru, Venezuela, Ecuador and Bolivia; see Roberts 2013, Table 1, p. 1437.

<sup>94</sup> Roberts 2013, 1441.

<sup>95</sup> Stokes 2001.

<sup>96</sup> Bornschier 2013, 66.



kind of reciprocal voter-party linkages theorized in this article. At the same time, the further trajectory of the Argentine case shows that if political actors do not help to reproduce historical legacies, their imprint may fade. There is widespread consensus that the Peronists' (increasing) reliance on clientelistic mobilization strategies has hampered representation in the longer run.<sup>97</sup> On the other hand, the Peronists have moved back to the left under Néstor and Cristina Kirchner. In the light of the 2015 elections, it may even have been premature to deplore the vanishing of the right after the “breakdown” of the Radicals in 2003.<sup>98</sup> The further trajectory of representation in the Argentine party system thus remains open.

Together with Venezuela, the Argentine case is among those that Lupu seeks to explain in a framework emphasizing mechanisms that are similar to my own, but operate in the short term.<sup>99</sup> According to this author, when “brand dilution” – meaning that parties abandon their accustomed spacial positions and lose their distinctive policy profiles – coincides with economic crises, they risk devastating defeats from which they are unlikely to recover. In the case of Venezuela, I concur with Lupu in emphasizing the lack of representativeness of the party system in explaining the collapse of both traditional parties (similarly to other authors that in addition have emphasized the ebbing of the clientelistic or patronage resources).<sup>100</sup> While Lupu's approach sheds light on the proximate causes of party breakdown, his cases of breakdown are clustered in my category of aborted polarization, with the partial

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<sup>97</sup> E.g., Gibson 1997; Levitsky 2003.

<sup>98</sup> Lupu 2014, 582-585; Anderson 2009.

<sup>99</sup> Lupu 2014.

<sup>100</sup> Roberts 2003; Lyne 2008; Levitsky and Loxton 2013.

exception of the Argentine Radicals.<sup>101</sup> Our approaches are thus complementary, in that I analyze the forces underlying the gradual erosion of a party system's roots in society, which represents the crucial precondition for party system breakdown at a moment of crisis. In line with classical realignment theory, the forces of dealignment work gradually, while change tends to manifest itself abruptly in a number of "critical elections".<sup>102</sup> More generally, while Lupu focuses on how parties' brands are diluted, my emphasis is on the process by which they are created. My model thus helps to explain why Chile, Uruguay and Argentina are so different from other Latin American party systems. While this fact as such is well known, no coherent framework has as yet been put forward to explain it – with the exception of Kitschelt et al.'s recent study, to which I now turn.

Secondly, my argument is related to Kitschelt, Hawkins, Luna, Rosas, and Zechmeister's explanation of the differences in programmatic structuring in Latin American party systems.<sup>103</sup> The authors convincingly show that early modernization (measured in terms of 1928 GDP) is a much better predictor of programmatic representation in the 1990s – the same period I am looking at – than later levels of GDP, and that contemporary levels of GDP are highly endogenous to historical welfare state formation.<sup>104</sup> According to the authors, early developing countries established inclusive welfare states, which then created the "stakes" of political conflict necessary for parties to develop contrasting policy profiles. But Kitschelt et

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<sup>101</sup> Lupu 2014.

<sup>102</sup> C.f., Mayhew 2000.

<sup>103</sup> Kitschelt et al. 2010b.

<sup>104</sup> Kitschelt et al. 2010c.

al.'s argument leaves open why welfare states were established in early modernizing countries, and who the actors were that helped bring them about. In line with Roberts (discussed above), Kitschelt and his colleagues find that the strength of the left or of the labor movement is a poor predictor of programmatic party competition.<sup>105</sup> In consequence, they refute an autonomous role of the party system in triggering both welfare state development and good representation.

Both Roberts and Kitschelt and his colleagues thus fail to find an impact of the organization of the left because they neglect the important role of the right. For instance, while the labor movement was relatively strong Peru and Bolivia, these countries neither saw protracted polarization in the party system, nor was the instability of democracy propitious for the development of encompassing welfare states. Where conservative forces relied on the military to defend its interests, the right was less pressed to preempt the growth of the left by making concessions in terms of welfare provisions.<sup>106</sup> Consequently, the left was capable of pushing for the establishment of welfare states only where a balance of power between left and right was present. In these contexts, ideological conflict was channeled into party competition, resulting both in strong partisan alignments, and in encompassing welfare states. My findings and those of Kitschelt and his colleagues are thus not contradictory, because I emphasize factors antecedent to theirs. Our explanations

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<sup>105</sup> Kitschelt et al. 2010b, 193-4.

<sup>106</sup> Haggard and Kaufman (2008: chap. 2) show that Latin American countries that experienced longer periods of democratic rule developed stronger welfare states due to electoral incentives and interest-group pressures.

complement one another because Kitschelt et al. highlight an important mechanism of how polarized conflict is sustained: by ongoing contention over the welfare state.

Kitschelt et al.'s analysis has the further merit of showing that economic modernization is a less powerful predictor of good representation than the historical institutionalist explanations we both offer. If modernization plays a key role, then it did so in the first half of the twentieth century. Of course, there is still a significant positive correlation between modernization in the 1990s and the quality of representation in the same period. But the correlation between early modernization and later representation (in the 1990s) is much stronger. Thus, an explanation based on modernization must focus on the early period. And in fact, looking at the figures for GDP in 1928 that Kitschelt et al. have assembled,<sup>107</sup> early modernization is closely correlated with historical polarization: My three polarization cases – Argentina, Uruguay, and Chile – are those displaying above-average levels of GDP in 1928. Early polarization is less intimately related to GDP in 1980 or 1998, because Venezuela, Brazil and Mexico have caught up in terms of modernization, but not with respect to the quality of representation.

There is no obvious link from early modernization to representation in the 1990s other than that running through features of the party system that derive from the historical period. And the fact that the Uruguayan, Chilean, and Argentine party systems look so different otherwise suggests that polarization, and not some other party system feature matters for representation. What is it, then, about early modernization that is conducive both to polarization and the establishment of

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<sup>107</sup> Kitschelt et al. 2010b, 180.

encompassing welfare states? The exploration of possible explanations is well beyond the scope of this article, but I suggest several avenues for further research. First, the presence of a comparatively strong right (the Conservatives in Chile, the Blancos in Uruguay, and the Radicals in Argentina) may be the result of a specific pattern of economic development in the nineteenth century that resulted in early industrialization and modernization later on. Thus, the effect of early modernization on the party system would run through the strength of the right. Inversely, institutionalized elite conflict – and, as a by-product, a strong right – may have facilitated early development. Third, to explain the reaction of the establishment against the left, it may matter at which point in time polarization occurred. During the Great Depression in the 1930s, authoritarian backlashes occurred even in Uruguay and Argentina, but with the onset of Import-Substituting-Industrialization (ISI), the relationship between the left and right grew less antagonistic. Because the left appeared less threatening, party system polarization became compatible with democratic regime survival. Countries that only saw significant development after the onset of the Cold War, on the other hand, were at an obvious disadvantage, as the international climate favored restricted competition. This is most clearly demonstrated by the pacted transitions of the 1950s in Colombia and Venezuela, where external pressure or at least the international climate played important roles.<sup>108</sup> Where the left was already firmly institutionalized in the Cold War period, on the other hand, it was more difficult to repress – this is why the timing of its mobilization, which in turn is related to economic development, may have mattered. As a final possibility, the early

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<sup>108</sup> Bejarano 2011.

developers may have been at an advantage because higher levels of literacy, education, and associationalism fostered political interest, involvement, and also programmatic polarization. Although it cannot be ruled out on theoretical grounds that these factors can contribute to good representation independently of polarization, in none of the cases studied in this article did they translate into congruent representation in its absence. In sum, the available evidence suggests that polarization is the main factor translating early modernization into good representation.

## Conclusion

To put the findings presented in this article in their simplest form, only those party systems in Latin America exhibited congruence in the 1990s in which a challenging party had started polarizing the party system several decades earlier. Uruguay, Chile, and Argentina followed a trajectory of inclusion and sustained polarization. Conflict along the state-market dimension was channeled into party competition in these countries, and became engraved in lasting political identities and partisan loyalties. Undeniably, high levels polarization are problematic not only for the stability of democracy, but also for reaching compromise, as exemplified by contemporary US politics. At the same time, Hetherington finds that polarization in the US “has clarified public perceptions of party ideology, which has produced a more partisan electorate”.<sup>109</sup> A key problem in the US context is that parties occupy more extreme

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<sup>109</sup> Hetherington 2001, 629.

positions than their voters.<sup>110</sup> In Latin America, the reverse was true for much of the twentieth century: Cartels formed by pre-democratic elite parties, sustained by bans on left-wing parties, combined with the de-mobilizing effect of clientelism, narrowed down the political spectrum. Partially as a consequence, political movements often chose extra-parliamentary strategies to achieve their ends, with disastrous consequences for democracy. The results of this article suggest, in line with Bermeo's supposition, that at least in the long run, the destabilizing effects of extremism are best mitigated by inclusion.<sup>111</sup>

Of course, too much polarization can be problematic, both in terms of regime stability, as well as for governability. In Latin America, the weakness of the right in conjuncture with widespread inequality in the twentieth century certainly made ideological moderation appear appealing. According to Collier and Collier, the political moderation of the left, and a labor movement tied to the political center, have been key in making more inclusive political regimes viable in Colombia, Venezuela, as well as in Mexico.<sup>112</sup> Likewise, both classical modernization theory, as well as its contemporary variants assume that the moderating effects of rising affluence or declining inequality make democracy sustainable.<sup>113</sup> In the light of the persistent differences in the quality of Latin American democracies, privileging the goal of stability is problematic, however. In terms of the quality of representation and the long-term viability of these democracies, the collusion of the major parties in

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<sup>110</sup> Fiorina and Abrams 2008.

<sup>111</sup> Bermeo 1997.

<sup>112</sup> Collier and Collier 2002.

<sup>113</sup> E.g., Lipset 1957; Boix and Stokes 2003; Boix 2011.

Colombia and Venezuela, cases that represent success stories from Collier and Collier's point of view, was not propitious. Without meaningful choice, which generally implies that segments of society lack representation, democracy carries little normative weight. The relationship between polarization and democracy is therefore probably best conceived of as a curvilinear one, where too little ideological differentiation is equally harmful as too much polarization.

The irony is that some of the countries that have been considered success cases for having avoided polarization in the twentieth century are today confronted with much more polarized politics than those that experienced it early on. Starting with Venezuela, radical left parties have gained power in various cartelized party systems. Whether this development will be beneficial for representation is open to doubt, as the party system lacks institutionalization, the playing field has become severely distorted in favor of incumbents, and even democracy as a whole is under threat.<sup>114</sup> On the other hand, the appearance or growth even of moderate ideological alternatives where they were historically absent may be able to exert positive effects on representation. Indeed, the Brazilian Workers' Party (PT) ability to claim credit for its social policy innovations may establish programmatic linkages between the party and certain social constituencies, thereby anchoring the party system more strongly in social structure and pushing it in a more programmatic direction. Together with what is happening as a consequence of the PAN's challenge to the PRI in Mexico, this suggests an alternative route to programmatic party competition – a route that is open even to those countries that lack favorable historical experiences with polarization.

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<sup>114</sup> Levitsky and Loxton 2013; but see Handlin 2013.



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