

## **Incorporation “From Below”: Insights from Bolivia and Uruguay**

Santiago Anria  
Dickinson College  
[anrias@dickinson.edu](mailto:anrias@dickinson.edu)

Juan A. Bogliaccini  
Universidad Católica del Uruguay  
[juan.bogliaccini@ucu.edu.uy](mailto:juan.bogliaccini@ucu.edu.uy)

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*Abstract:* Recent empirical research shows that if we look at the nature of party-society linkages the differences between cases in the “moderate” and the “radical” strands of the Latin American left are less stark than we initially thought. Uruguay’s Frente Amplio (FA), for instance, has more in common with Bolivia’s Movement Towards Socialism (MAS) than with Brazil’s Workers’ Party (PT)—particularly in its degree of openness and responsiveness to the party’s social bases. In this article, we link this finding to broader macro-political outcomes that are central in the study of Latin American political economy today. Bolivia and Uruguay are, in many ways, representative of broader regional trends of the early twenty-first century: both cases experienced a dramatic growth of the middle classes, the expansion of social programs benefiting large groups, notable declines in poverty as well as in social and economic inequalities, and the increased access of subordinate social groups to national decision-making. They have achieved, in short, significant progress advancing an agenda of incorporation, defined as the expansion of substantive citizenship rights. In this paper, we explain how party organizational attributes of the MAS and the FA, especially their strong societal linkages, have contributed to shaping such outcomes—which, despite similarities in their general tendency, vary in depth and scope across the two cases. We also trace how underlying socio-political pressures generated by each party’s organized social bases have constrained progress in areas that are crucial to sustaining important advances made in the past decade, such as labor, tax, education, and health reforms. This article draws on data collected through extensive fieldwork in Uruguay and Bolivia.

## **1. Introduction**

During the last three decades, Latin America has navigated deeply into the waters of two important processes: the strengthening of democratic rule and incorporation into the global market economy. The collapse of the Import Substitution Industrialization (ISI) model and the subsequent abrupt opening into the market economy under the wings of the Washington Consensus had a radical effect in terms of incorporation and the politics of political representation. While macroeconomic stability became a widely shared goal for governments with serious pretensions to compete in the global economy, the structural adjustment period produced profound transformations in social protection mechanisms and labor-capital relations. Political parties throughout the region were caught in a dilemma in terms of the form and extension of new social protection mechanisms and labor-capital regulations.

While the neoliberal critical juncture deeply challenged existing party systems all over the region (Roberts 2015), parties with strong connections to grass-roots social movements and other organized mass constituencies have been very effective at crafting winning electoral coalitions and bringing left-wing alternatives to power in several cases. The resulting rise to power of leftist parties and leaders since 1998 led to several analyses of their origins, their performance in office, and the sources of their policy orientations once in office. And indeed, there is a copious literature on the topic of the Latin American Left. Building on different political and normative concerns, the existing literature tends to group together Bolivia, Venezuela, and Ecuador in the “radical” or “contestatory” strand of the left, and Uruguay, Brazil, and Chile in the “moderate” or “social democratic” strand.

The usefulness of those classifications has clearly reached a limit, however (Bruhn 2015). Despite the abundance of works in this general area of inquiry, the literature on the Latin American left remains insufficiently attentive to how differences in party organizational characteristics and

party-society linkages shapes big-picture macro-level processes. These include, for instance, the opportunities and constraints that left-wing governments have in advancing and sustaining ambitious agendas of incorporation, which today involve new social actors and occur through more fluid structures than in the earlier periods of incorporation that Collier and Collier (1991) described for Latin America in the mid-twentieth century.<sup>1</sup>

With the left in power, much of the region experienced a process of incorporation, defined as advances toward the expansion of substantive citizenship rights (the expanded influence of subordinate groups in policymaking and social and economic policies that extend or universalize basic social rights to those groups).<sup>2</sup> The region also experienced the parallel weakening of traditional channels for controlling political and economic processes usually exerted by economic elites. In such a context, “radical” and “moderate” designations of leftist parties and governments have become less useful for understanding substantively important outcomes.

As recent research has demonstrated, when looking at organizational attributes and the nature of party-society linkages across cases, Uruguay’s Frente Amplio (FA), for instance, has less in common with the Brazilian Workers’ Party (PT), with which it is often compared as belonging to the same strand of “moderate” Latin American left, than with Bolivia’s Movement towards Socialism (MAS). Both FA and MAS are instances of “movement-based” parties that derive organizational power from their close ties to a wide array of social movements and other organized mass constituencies, to which they are largely accountable. Despite the oft-cited designations, in short, “radical” Bolivia and “moderate” Uruguay share not only important similarities in the organizational

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<sup>1</sup> For the burgeoning literature on the politics of “new incorporation” in contemporary Latin America see, among others, Levitsky and Roberts (2011), Silva (2012; 2017), Roberts (2015), and Rossi (2015). These works tend to conceive of Latin America’s “second incorporation crisis” (a parallel to the first one that enfranchised subordinate groups during the import-substitution industrialization model) as reflecting the reactive politics of popular sectors to neoliberal restructuring. Other scholarship has linked the politics of incorporation to participatory innovations and the “deepening” of democracy (Goldfrank 2011; Cameron, Hershberg, and Sharpe 2012).

<sup>2</sup> Silva (2017: 95) advances a similar conceptualization. This new incorporation can be distinguished from that of the 1930s and 1940s, which emphasized the recognition, legalization, and institutionalization of labor union linkages to the state and/or political parties as a way to represent the interests of labor in the political arena (Collier and Collier 1991).

underpinnings of their parties in power, but also in terms of substantively important outcomes. Both cases experienced a dramatic growth of the middle classes; the expansion of social programs that extends or universalizes basic social rights; notable declines in social and economic inequalities; and the increased access of subordinate social groups to national decision-making. They have achieved, in short, substantial progress expanding substantive citizenship rights.

The rise to power and tenure in office of these two parties coincided with the beginning of an unusual decade-long period of region-wide economic growth fueled by the sustained rise of commodity prices. This context benefited Latin American societies by fueling important increases in activity rates and concomitant decreases in unemployment, as well as a reduction in the informal economy and precarious employment. The exponential growth of the middle classes—measured by income—can be partially explained by this commodity boom.

However, both Bolivia and Uruguay switched course under the MAS and FA in less volatile measures accounting for greater political, economic, and social inclusiveness. The incorporation process in Bolivia was similar to what more advanced countries in the region experienced during the first decades of the 20<sup>th</sup> century. In general, the expansion of social protection was driven by a change in paradigm from segmented contributory-based programs towards broad-based programs with aspirations of universalism. Incorporation through a sustained advance in education attainment is perhaps the trademark of the Bolivian success; and decommodification (Esping-Andersen 1985 and 1990) advanced firmly in both countries through aggressive expansion of health care coverage, formalization-oriented policies in the labor market, gender-oriented programs, and cash transfers programs. Therefore, these two cases paired economic growth with macroeconomic stability amid a strong investment in extending substantive citizenship rights.

This article attempts to bring “society back in” to the center of the analysis to study macro-political outcomes that are central in the study of Latin American political economy today. We seek

to explain how party-society linkages shaping the organization of the MAS and the FA and the conditioning effects of institutional arrangements have shaped the basic contours of contemporary processes of incorporation—which, despite broad similarities in their general tendency, vary in depth and scope across the two cases. We explore the merits of the hypothesis about strong societal linkages being important elements concerning the general direction, scope, and breadth of those processes. In our case-study part of the analysis, we trace how underlying socio-political pressures generated by each party’s organized social bases constrained progress in areas that are crucial to sustaining important advances made. Bottom-up pressures generated by the parties’ social bases, we propose, not only enabled advances but in times represented important obstacles in key policy spheres, creating serious challenges for the governments’ long-term left projects. We expose these contradictions and tensions under the lens of the politics of political representation—between democratic incorporation and conservative modernization. We show how segmentation of opportunity, status and asset enclosure, informality and inequality are not only sustained by conservative elites but more broadly by left party’ core constituencies, a conflict partially rooted in the nature of party-society linkages.

## **2. Basis for Comparison**

A “contextualized comparison” (Locke and Thelen 1995) of Uruguay under the FA and Bolivia under the MAS is well suited for uncovering contemporary processes of incorporation. This is for several reasons. First, both countries share recent histories of transitions from authoritarian rule and transitions from highly regulated to more market-oriented economies. In such context, both the FA and the MAS were formed as mass-mobilizing opposition parties and they followed a distinctively “bottom-up” logic of party genesis (Anria 2018; Pérez et al. 2018). Both started out as

Socialist parties and yet adapted programmatically in part as a response of electoral imperatives while in opposition; and both moved towards the center in terms of their macroeconomic orientation and their core programmatic agenda as they got closer to state power. We briefly show these processes in the case-study portion of the analysis.

Second, both left-wing parties accessed office in the context of Latin America’s “left turn” and have experienced unparalleled continued electoral strength.<sup>3</sup> Both parties have maintained a strong commitment to inclusive social policy and a reduction of inequality, and have managed to retain the presidency over consecutive elections in the absence of significant challenges from the left and/or the right (Anria and Huber 2018). Comparing their experiences in power is therefore warranted as an empirical exercise.

On the one hand, the comparison allows us to trace how similar mass-mobilizing parties with strong connections with social movements and other organized popular constituencies led similar processes of incorporation in starkly different structural settings. On the other hand, cross-national differences in terms of economic development, democratic record, and state capacity are addressed head on in the case-study portion of the analysis. By adopting a most-different research design we can rule out competing explanations, but cannot establish causality. We therefore combine this approach with comparative within-case analyses to trace the different ways in which those parties’ social bases have enabled or constrained—or even blocked—key reforms to enhance incorporation. We build our case-based analyses on the congruence method (George and Bennett 2005), which is particularly strong to explain variance along key dimensions of the dependent variable.

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<sup>3</sup> Only Venezuela under Chávez (1998-2013) and now Maduro (2013—) is an example of a left-wing government that has outlasted those of Uruguay and Bolivia, but its survival in office has come with an authoritarian turn, and the case is thereby excluded from the analysis.

To be sure, we could compare Uruguay with Chile rather than with Bolivia (and by the same token Bolivia with Ecuador or Venezuela rather than with Uruguay). However, such comparisons would mask important differences in the outcomes that we care about. Take the example of Chile. Like Uruguay and Bolivia, Chile also experienced a steady reduction of poverty amidst sustained economic growth—and it even experienced a decline in income inequality. Reforms under Socialist presidents Ricardo Lagos (such as healthcare) and Michelle Bachelet (such as non-contributory pensions), moreover, represented significant pushes in the direction of incorporation and universal social citizenship rights—similar to those observed in Uruguay and Bolivia. However, Chile pushed public policy in this direction through a technocratic logic of policymaking that provided little impetus for social mobilization from below (2017). In other words, unlike Uruguay and Bolivia, Chile did not experience the expanded influence of subordinate groups in the political arena. Incorporation was not shaped from the “bottom-up.”

While contemporary comparisons between Uruguay and Chile abound (Pribble and Huber 2011; Bogliaccini 2012; Luna 2014; Bogliaccini and Luna 2017), comparisons between Uruguay and Bolivia are elusive. Existing scholarship on the revival of leftist alternatives tends to count Uruguay’s FA as an example of the “moderate” left while Bolivia is described as more “radical.” Those classifications of left parties, as Bruhn (2015: 249) states, may have reached a limit. For one thing, the differences *within* the so-called moderate (liberal, responsible, non-populist) left are far more remarkable than what the existing literature has established, and there are strong similarities among left parties commonly classified in different typological boxes. Anria (2018) shows that when organizational factors and the nature of party-society linkages are examined, cases like the FA have more in common with the MAS than with the Brazilian PT, or even with Chile’s Socialist Party (PS). Given that the structure of parties and the strength of party-society linkages shape the direction, texture, and scope of social policies (Pribble and Huber 2011) and developmental outcomes (Evans

and Heller 2017), there are great analytical payoffs in comparing cases that are organizationally similar, and yet rarely compared. Looking closer at these party organizations, and specifically the interactions between the parties and their organized social bases, can help us gain a better understanding of the reasons behind the progress made in terms of incorporation in two of the countries of the region that have achieved remarkable progress.

Uruguay and Bolivia, where the left managed to retain the presidency over three consecutive elections, experienced an important expansion of the political arena—the progressive inclusion of subordinate social actors in decision making and the policy process. These include, predominantly, urban labor unions in Uruguay and a wide array of grass-roots groups in Bolivia, including peasant unions, cooperative miners, transport unions, and urban workers in Bolivia’s large informal sector, among others. Expanded access and influence in the political process takes place both from within the state (in representative institutions and state bureaucracies at the national and subnational levels) and from without (through contestation, or direct pressure in the streets). This is not to say that those groups have complete control over the national agenda in each country. Rather, it is to suggest that the interests, demands, and priorities of large segments of socioeconomically disadvantaged groups have become increasingly harder to ignore by government policy.

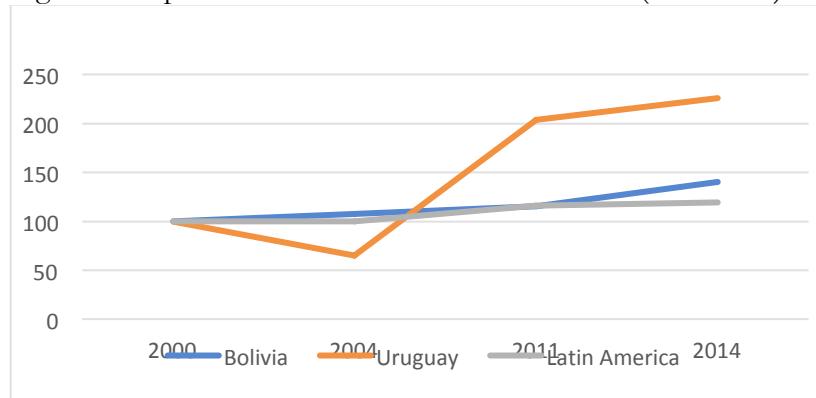
Both cases also witnessed sustained economic growth thanks in large part to commodities. While the commodity boom offered the *opportunity* for expansive fiscal policy,<sup>4</sup> the FA and the MAS maintained a strong *commitment* to inclusive social policy and to reducing inequality and social exclusion—the kinds of commitments to incorporation that brought those parties to power to begin with. As a reflection of this shared agenda, public spending on health, education, and social security accelerated dramatically in both cases—especially when compared to the 1990s (Figures 1 and 2). While Figures 1 and 2 show the magnitude of the investment in relative terms with respect to the

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<sup>4</sup> Both countries experienced slowdowns beginning in 2014, but not contraction.

initial situation in 2000, it is equally important to underline the investment effort in terms of an already growing GDP. In terms of education investment, Uruguay increased its investment roughly two points of GDP, moving from a baseline of 2.5 percent of GDP in 2004 to 4.5 percent in 2014. However, as we shall show in the case-study portion of the analysis, Uruguay has not been able to capitalize the investment effort in terms of access to education because of internal conflicts within the FA and with teachers' unions. Bolivia, however, stands out; the MAS increased education expenditure in one percentage point in terms of GDP, from 6.4 in 2004 to 7.4 in 2014.<sup>5</sup> In terms of public health expenditure, while Bolivia increased a whole percentage point in terms of GDP, from 3.5 in 2004 to 4.6 in 2014, Uruguay increased the expenditure from less than 2 percent of GDP to over 6 percent in the same period.

Figure 1. Expenditure in Public Health. Evolution (2000=100)



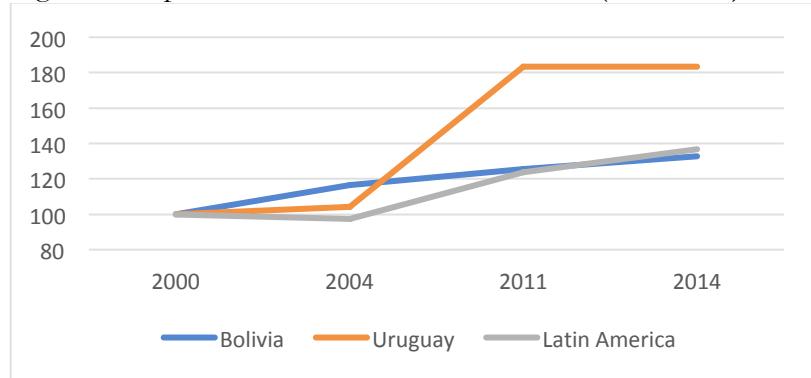
Source: ECLAC (2017)

Both countries also greatly expanded non-contributory pensions and cash transfers that have wide coverage and reach broad, cross-class segments of society. And both countries implemented reforms aimed at increasing labor formalization (Amarante and Arim 2015; Amarante and Gómez 2016). Here, however, Uruguay stands out; the FA governments reinstalled collective wage

<sup>5</sup> The regional average for 2014 was of 5.2 percent of GDP.

bargaining in 2005 and created a single-payer health care system that not only approximates equality of access to health-care but also stimulates the search for formal sector employment. According to Bérgolo and Cruces (2011), this last reform stimulated the search for formal employment because of the new health coverage to formal workers' children and unemployed spouses.

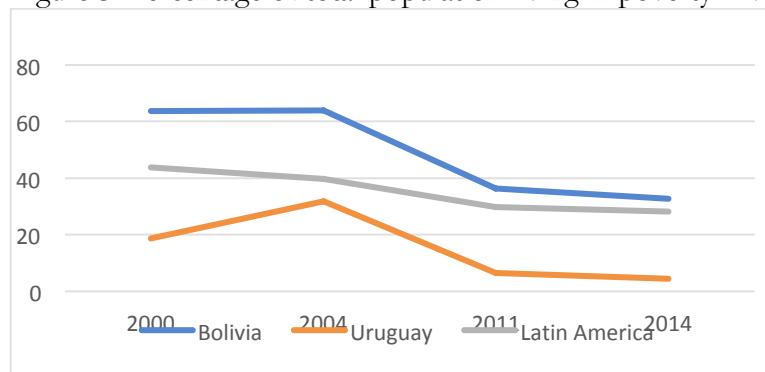
Figure 2. Expenditure in Education. Evolution (2000=100)



Source: ECLAC (2017)

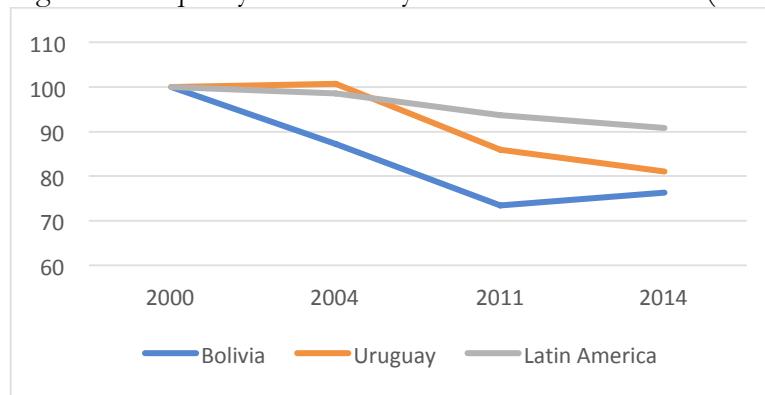
Remarkable gains have been made in poverty reduction in both cases, and both countries also experienced a significant expansion of the middle class. Especially noteworthy, however, are the trends in inequality reduction. Bolivia experienced the sharpest decline in inequality of the region, reducing it steadily from 56.7 in 2006 to 45.5 in 2015. Uruguay started in a more favorable situation in 2005, with a Gini of 47.2, and yet the FA governments managed to reduce it to 41.7 in 2015, the lowest of the two cases and in Latin America in general (Figures 3 to 5). Whereas economic growth has been one of the primary drivers of the reduction of poverty levels, it has not been the only factor responsible for pronounced reductions in income dispersion. Politics mattered too. Sustained increases in the minimum wage alongside successful formalization efforts, higher levels of employment, improvements in non-contributory pensions, and conditional cash transfers have also been important for improving poverty and inequality, and advancing an agenda of social inclusion.

Figure 3. Percentage of total population living in poverty. Evolution (2000=100)



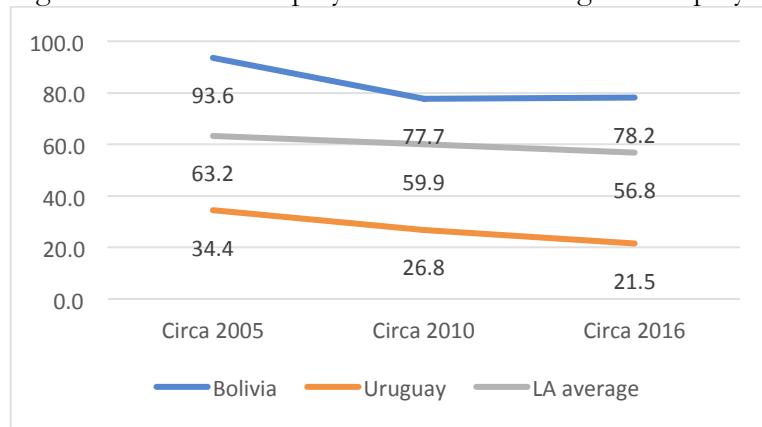
Source: ECLAC (2017)

Figure 4. Inequality measured by Gini Index. Evolution (2000=100)



Source: ECLAC (2017)

Figure 5. Informal Employment as a Percentage of Employed. Evolution (2000=100)



Source: For Bolivia World Bank, World Development Indicators. For Uruguay and Latin America average IDB Statistical Annex Social Pulse 2017

Notes: Latin American average is a simple average of 18 countries.

### **3. Explaining Incorporation “From Below”**

Building on the copious literature on Latin America’s left turn, we now construct a set of theoretical expectations and explore their capacity for explaining incorporation outcomes. Although the existing literature offers some theoretical guidance for the empirical exploration of big-picture outcomes, like processes of incorporation, it remains insufficiently attentive to the impact that party-society linkages have on said outcomes. We argue that strong societal linkages are key for explaining the general direction, scope, and breadth of those processes. In our account, the strong linkages of Uruguay’s FA and Bolivia’s MAS largely explain the advances toward political inclusiveness and the expansion of social policies that universalize social rights to subordinate social actors. We further argue that bottom-up pressures generated by the parties’ social bases also placed important obstacles in key policy spheres (education in Uruguay, taxation in Bolivia), creating serious challenges for the governments’ long-term left projects. While our analysis privileges agency over structural constraints, like state capacity, it also confirms the importance of left parties in alliance with strongly organized subordinate groups in explaining the expansion of substantive citizenship rights (Esping-Andersen 1990; Huber and Stephens 2001).

One prominent explanation focuses on the overall policy orientation of the left—moderate or radical, social liberal or populist—as a key driver shaping incorporation outcomes. The literature on the post-structural adjustment resurgence of leftist political parties and movements in Latin America produced useful theoretical contributions over the past decade. One of them is the idea of the existence of two different lefts in the region (Weyland 2009; Weyland et al. 2010). According to this literature, which focuses mostly on performance, we should expect fundamental differences between the type of policies adopted and processes of incorporation led by leftist parties that prioritize programmatic moderation and those led by parties that have a more radical agenda. While

the radical left would make more aggressive strides toward incorporation, often at the expense of undermining democracy and at the risk of compromising the sustainability of economic and social policies, the other left would adopt more moderate and incremental policies that in the long run promote more sustainable agendas of incorporation (Weyland et al. 2010: 142). As a result of this, the latter often experiences a sharp “tension between governing and maintaining grassroots linkages” (Levitsky and Roberts 2011: 421).

The distinction between a moderate and a radical left is in principle a good information shortcut. However, given the similar results achieved by Uruguay (a moderate case) and Bolivia (a radical case) in the realm of incorporation, and taking into account the maintenance of vibrant grassroots linkages in both cases (Anria 2018; Rosenblatt 2018), we are highly skeptical that policy orientation alone can give us sufficient theoretical purchase for explaining those similarities.

A second possible alternative argument places party institutionalization as the driving force of incorporation outcomes. Leftist parties in post-adjustment Latin America have different levels of institutionalization as well as different types of linkages to voters and organized mass constituencies (Hagopian 1996; Kitschelt et al. 2010; Roberts 2011; Levitsky and Roberts 2011). The literature suggests that there are crucial differences between the policies of the institutionalized partisan left and the “new” movementist left—differences that could lead to sharp variation in the depth, scope, and substance of incorporation. The institutionalized left, marked by established and stable party organizations, is more likely to adopt incremental policy change and expand social policy in a universalistic direction, but is also likely to have much more trouble boosting political inclusiveness or incorporating subordinate groups into the political arena. The rationale is that there is something—something not fully explained—about the logic of party institutionalization that suppresses social mobilization and slows down social and political change.

We are skeptical that the level of party institutionalization is what really matters for shaping processes of incorporation, and we further find the institutionalized/uninstitutionalized distinction not particularly revealing. In our thinking, we are closer to Pribble and Huber (2011) and Pribble (2013), who in their study of social policy expansion in Uruguay and Chile stress the importance of party-society linkages more than the level of partisan institutionalization; the stronger societal linkages in Uruguay helped expand social policy in a bolder and more universalistic direction, but constrained progress in areas such as education reform (due to the pressure from the FA's social bases, particularly teachers' unions). What matters, in short, is the nature and strength of those connections. Parties can be highly institutionalized and maintain vibrant societal linkages and bottom-up impetus, as in the case of the FA (Rosenblatt 2018), or those links can be atrophied as in the case of the PT (Hunter 2010) or the Chilean Socialist Party (PS). Parties can be loosely institutionalized and maintain strong ties to organized mass constituencies, as in the case of the MAS, or they can become highly personalistic vehicles for a charismatic leader. While Pribble and Huber (2011) are concerned with the expansion of social policy alone, we are interested in using the nature of party linkages to delve deeper into broader processes of incorporation.

A third argument links incorporation outcomes to state capacity. We are skeptical that state capacity alone can explain incorporation outcomes, however. State capacity is a multidimensional concept related to the ability of state institutions for reaching into society and affecting individual behavior (Kurtz 2013: 3). Measures of state capacity in Latin America are congruent in showing that, while during the 20<sup>th</sup> century most countries in the region improved state capacity, relative distances among them have remained rather stable over time. Soifer's (2015) scores of state capacity for eleven countries in the region circa 1900 and 2000 show what others have also suggested; that Uruguay consistently ranks among the handful of countries with the strongest states in the region, while

Bolivia is among the cases with the less effective public administrations historically (Kurtz 2013; Soifer 2015; López-Álvez 2000; Centeno 2002).

However, robust differences in state capacity between Bolivia and Uruguay do not fully explain incorporation outcomes. Social advancements—particularly in education—under the MAS in Bolivia are extremely remarkable given the context of low state capacity. Similarly, the Uruguayan stalemate in terms of education reform (as mentioned above) is also striking and puzzling. Although we do not deny that higher levels of state capacity can be positive for long-term consolidation of political processes of incorporation, it is less evident that higher levels of state capacity are the main drivers of incorporation. As the pages below demonstrate using evidence from Bolivia and Uruguay, the nature and strength of party linkages go a long way in explaining how—and how far—processes of incorporation unfold.

For developing the case-study portion of the analysis, we gathered evidence from a battery of sources. Our research strategy includes an extensive review of secondary sources, and especially historical works; the examination of parliamentary documents, including transcripts from committee briefs and other types of documents handed to those committees by interests groups; and a close reading of the main newspapers in each country. In addition, we conducted in-depth interviews with business leaders, party leaders, leaders of unions and other grass-roots organizations, and politicians in each country.

#### **4. Bolivia**

Since 2006, Bolivia experienced huge strides toward greater political and social inclusiveness. This was largely driven “from below” via a movement-based party, the MAS, formed directly by a peasant social movement in alliance with other rural and urban subordinate social actors. The party’s

organizational power derives principally from its strong ties with a wide array of grass-roots social movements, which provide a formidable mass base and mobilizational power.

A major advance in terms of strictly political inclusiveness relates to the composition of representative institutions. While reforms in the 1990s, like the 1994 Law of Popular Participation (LPP), had created opportunities for the incorporation of popular groups in municipal governments, the formation of the MAS, and its subsequent ascendance to national power, served as a vehicle for its realization in a nation-wide scale. An early turning point was the 2002 national election, when the MAS won significant minorities in both houses. A blow to the status quo, those results enabled the arrival of representatives from previously excluded groups, particularly peasants, into Congress.<sup>6</sup> Since then, Bolivia has experienced a gradual circulation of political elites; actors of more diverse ethnic, class, and ideological composition have gradually, and pacifically, displaced the hitherto dominant political actors.<sup>7</sup>

This trend would accelerate as the MAS gained national power. Its experience in office has led to central changes in the political arena, including wider regime responsiveness, representation of historically marginalized groups, and an expansion of both individual and collective rights to indigenous peoples. Changes are crystallized *de jure*, in the country's 2009 Constitution, and *de facto*, in everyday practices within existing and new institutions. The constitution has prioritized the construction of a more inclusive society. Bolivia even was renamed the Plurinational State of Bolivia, in recognition of its plurinational character. It also recognized different forms of democracy (representative, participatory, and communitarian) and created new regimes of participation, such as indigenous autonomies.

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<sup>6</sup> Of course, the growing presence of indigenous peoples in positions of power cannot only be attributable to the MAS, and it can even be traceable to the 1952 National Revolution; however, the MAS strengthened these pre-existing trends.

<sup>7</sup> In a 2008 personal interview, a representative of PODEMOS expressed unmistakable discontent with this situation, when he commented that "now the Congress looks and *smells* differently."

Table 1: Representatives' Occupations Prior to Being Elected to Congress

	1993-97	1997-02	2002-06	2006-10	2010-14
Public Administration	14.2	16.3	21.9	16.5	18.6
Middle-Class Professions	48.7	37.8	28.1	25.0	17.7
Politician	4.3	4.1	7.6	7.3	11.1
Workers, Artisans, and Primary Sector	3.9	11.2	11.2	18.6	26.3
Transportation	-	2.0	1.2	4.2	5.2
Business and Private Sector	24.0	26.5	27.3	27.4	19.0
Retirees, Students, Other	7.7	2.0	2.8	1.0	2.1
Sample Size	74	98	80	96	97

*Source:* Zegada and Komadina (2014: 57).

Some of the most notable transformations have taken place within existing institutions, however. Changes are particularly evident in the increased power and access to the state of indigenous peoples, in their massive inclusion in governing and, particularly, in their penetration of representative institutions at all levels (national, departmental, and municipal). Table 1 illustrates the major trends. While the percentage of middle-class professionals has decreased from 48.7 percent in the 1993-97 legislative period to 17.7 in 2010-14, the percentage of peasants, artisans, and formal and informal sector workers—groups strongly linked with the MAS—growing from 3.9 percent to 26.3 percent in the same period.<sup>8</sup>

Part of this can be explained by the methods that the MAS employs to select candidates for elective office. Even as the party assumed and consolidated power, the party's grass-roots bases have retained significant influence over the selection of party candidates—a pattern that has empowered groups that were traditionally subordinate and under-represented. This led to the expanded political inclusiveness of large segments of the population that were previously on the margins of social and political life. As a result, the social and demographic profile of elected representatives has changed dramatically, and now features more peasants, as well as indigenous people and members of urban-

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<sup>8</sup> Similar trends can be observed in the executive, the judiciary, and the state bureaucracy (Wolff 2018: 8; Anria 2018).

popular groups. Seen from the long arc of Bolivian history, this was an exceptional change in a society characterized by deep ethnic divisions and social exclusion.<sup>9</sup>

On whether these newly included groups have expanded influence over national politics, Zegada and Komadina (2014) find that the growing presence of indigenous representatives coming from identity-oriented movements has been more symbolic than substantive.<sup>10</sup> At the same time, other research suggests that the growing presence of well-organized groups rooted in production or economic-activity in the formal or informal labor sectors (coca growers, cooperative miners, transportation unions, artisans, and street vendors, among others), has ensured a more substantive representation of their interests (Anria 2018).

The MAS has served as a key vehicle for political inclusion. The resulting inclusiveness of Bolivian politics is real; it created a “new normal” in the Bolivian political arena (Anria 2016; Silva 2017; Wolff 2018). Larger numbers of Bolivians do enjoy rights of citizenship and greater input into political decision-making. With the rise to power of the MAS in 2006, indigenous people and other subordinate groups now have increased access to the state. They are better able to shape decision-making around issues, claims, and objectives of their concern. They do so via representation (by penetrating representative institutions and state bureaucracies) or via contestation (by coordinating pressure on the streets). This is not to say newly incorporated groups have complete control over the national agenda, of course. It is rather to suggest that their interests, demands, and priorities have become increasingly harder to ignore.

As Jonas Wolff (2018: 9) notes, however, the greater political inclusiveness in Bolivia is “far from egalitarian or universal.” For one thing, the national peasant organizations that founded the MAS have enjoyed privileged access to and direct participation on policy-making, whereas identity-

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<sup>9</sup> Zegada and Komadina (2014: 93-94) reached similar conclusions.

<sup>10</sup> The 2009 Constitution established seven “special” seats for indigenous peoples and Afro-Bolivians. Although these “special” seats are a key component in the construction of Bolivia’s Plurinational State, it would be historically inaccurate to attribute them to the MAS; rather, they were put on the agenda by lowland and highland indigenous movements.

oriented indigenous movements (like CONAMAQ and CIDOB) have been comparatively sidelined from the policy process (Silva 2017). At the same time, some policy spheres still remain somewhat “sealed” and offer little room for grass-roots actors to exert meaningful influence, such as economic policy (Anria 2018). Regardless, it is undeniable that people from socio-economic groups that were long subordinated now enjoy a greater say in determining who gets what, when, and how.

Which begs question: so what? Thanks in large part to booming international prices and a strong gas and mineral production, Bolivia’s economic growth has been far greater than in previous decades. Since 2006, annual GDP growth has averaged 5 percent, reaching a peak of 6.8 percent in 2013 (World Bank estimates show Bolivia will grow 3.8 percent in 2018). Since then, also, remarkable gains have been made in terms of poverty reduction, with an estimated one million people escaping poverty (about 10% of the country’s population), and the formation of new social actors, like an incipient middle class (Shakow 2014). The result has been a generally more prosperous society, with the proliferation of new businesses, unprecedently high patterns of consumption, feelings of prosperity, and aspirations of upward mobility. The Morales administration, however, has been unable to reduce unemployment significantly.<sup>11</sup> Progress toward political inclusiveness as described above thus coexists with the inability of the MAS to attain social inclusion via the creation of quality, formal sector jobs. This has much to do with the inability of the MAS to move away from a development strategy based on extractive industries.<sup>12</sup>

Strong economic performance helped the MAS to maintain a commitment to inclusive social policy. Early on, a central policy involved increasing the capacity of the state to secure tax revenue, particularly from domestic elites and hydrocarbon multinationals. Higher taxes on the hydrocarbon sector in a context of booming international prices, generated an extraordinary increase in state

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<sup>11</sup> See <http://www.santiagoanria.com/data.html>

<sup>12</sup> Jobs are a central means through which social incorporation takes place. In a future draft, we might explore this issue of productive upgrading further. Bolivia’s reliance on extractive industries and its failure to innovate and enter into increasingly higher value-added niches in the global economy certainly limits the availability of quality jobs.

revenues and enabled a substantial acceleration of redistributive spending initiatives to expand social incorporation without the need for new progressive taxes (Fairfield 2015).

These initiatives include a mix of cash transfers, old-age pensions, and a wide array of subsidies for the low-income (on electricity, natural gas, water, gasoline, communications). Securing broader tax revenues, took place during the first few years the MAS was in office. It required power centralization and the use of democratically dubious tactics, including the mobilization of the party's social bases, for battling strong elites on the streets, which were also mobilized (Eaton 2007), and blocking business's instrumental or political power in congress. The idea behind this was to secure necessary resources to facilitate longer-term reforms.

As a reflection of the government's broader agenda of social incorporation, public spending on health, education, and, to a lesser extent, social security has accelerated substantially when compared to the 1990s (and, also, to Latin America's "top performers," according to Huber and Stephens 2012: 123). The data for the first two spending variables are presented in Figures 1 and 2.

Some of the resultant social policy reforms are promising advances toward incorporation, as they extend or universalize basic social rights to disadvantaged groups. These include the universal noncontributory pension, the Renta Dignidad, and the conditional cash transfers to elementary school children, the Bono Juancito Pinto, and pregnant women, the Bono Juana Azurduy. Due to its universalistic character, the Renta Dignidad, which is Morales' signature social policy initiative, is a good candidate for creating favorable policy legacies for further moves toward greater universalism (Huber and Stephens 2012: 265). Though Renta Dignidad is a modest transfer (up to \$350/year), it has increased over time surpassing inflation; it has also gradually broadened the base of beneficiaries (from 750,000 in 2008 to 1 million since 2014); and it has contributed to reducing segmentation in the generosity of benefits available through Bolivia's pension system. Renta Dignidad is also seen as a social right that reaches broad segments of society who hitherto lacked any prior protection

through social security. Mobilization from below by the party's social bases, as detailed elsewhere, was central for securing the resources and for passing this policy (Anria and Niedzwiecki 2016).

Following the passing of Renta Dignidad, the Morales government also engaged in a broader reform of the pension system, another clear move to extend and universalize basic social rights. The government took control of the management of the pension funds, lowered the retirement age from sixty-five to sixty (and even lower for hazardous jobs such as miners and the armed forces), and increased the benefits. Most importantly, the reform extended benefits to workers in the informal labor sector—a broad category that includes street traders, artisans, transport workers, and others. The reform was introduced by the MAS in response to demands by the Bolivian Workers' Central (COB), a militant labor confederation strategically allied with the MAS. Without becoming formally integrated into the party, the COB placed labor leaders as MAS candidates and occupied high-ranking positions in the government (like in the Ministry of Labor), becoming a strategic ally with privileged access to agenda setting—a point that demonstrates the importance of party linkages.

The presence of MAS legislators directly connected with the COB facilitated a greater substantive representation of their interests, and the COB was able to sponsor the pension reform from within, putting it on the agenda (Interviews Montes and Delgadillo).<sup>13</sup> The process was far from smooth, however, and it entailed four years of negotiation, contestation, and compromise. During this time, the COB mobilized against the MAS government in several occasions, mostly demanding minimum wage increases (Silva 2017). At the same time, the greater presence of strong economic groups linked to the COB in core state bureaucracies and Congress gave them greater space for input in the reform process. For example, transportation unions, one of the strongest groups that have gained representation through their linkages with the MAS, as described above,

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<sup>13</sup> Delgadillo, Walter. Bolivia's Minister of Labor (2009-2011), Cochabamba, Bolivia, April 1, 2013; also Montes, Pedro. Former Executive Secretary, Bolivian Workers' Central (COB). La Paz, Bolivia, April 21, 2013.

also played a leading role in the passing of this reform (Interview Durán).<sup>14</sup> They helped negotiate a Solidarity Fund that would allow the government to extend pension benefits to workers in the informal sector, which were left out of the existing pension scheme. A broad-based coalition of peasant workers, street traders, coca growers, cooperative mine workers, and other well-organized groups connected with the MAS also participated by providing mobilizational power in defense of this fund, when the COB leadership seemed most reluctant to accept it (Interview Machaca).<sup>15</sup>

Despite all this progress, a central political challenge to continue advancing and sustaining an agenda of social incorporation will be to secure broader resources. This became particularly clear since 2014, when the Bolivian economy experienced a slow-down. And it is here where, in the Bolivian case, a tension may exist between advancing toward greater political inclusiveness on the one hand, and socio-economic inclusion on the other. As described above, a burgeoning economy fueled by booming prices of commodities (gas, minerals, soy, coca, and even quinoa) have given rise to an incipient middle class of “indigenous entrepreneurs, owners of cooperative mines, land speculators, truckers, and traders of both contraband and legal goods” (Farthing and Kohl 2014: 156-57). Many in this group belong to the informal sector, and, as we have seen, many have also been politically incorporated through their strong linkages to the MAS. During the first years of the Morales administration, and amidst a context of booming prices, the government increased, albeit modestly, taxation on transport operatives and cooperative miners (Fairfield 2015).<sup>16</sup> Over time, however, these groups have proven to be increasingly reluctant to accept increased taxation and regulation, and they have challenged tax initiatives from within Congress and on the streets, often “with dynamite in their hands” (Farthing and Kohl 2014: 149). The unresolved challenge of

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<sup>14</sup> Durán, Franklin. President, Confederation of Transport Drivers (Transportation Workers Union). La Paz, Bolivia, April 17, 2013.

<sup>15</sup> Machaca, Rodolfo. Executive Secretary, CSUTCB. La Paz, Bolivia, January 17, 2013.

<sup>16</sup> In a personal interview, Bolivia’s Vice-President Álvaro García Linera commented: “when we decided to tax the transport sector, we went ahead and did it; we encountered resistance and strikes against this; there was no transportation for some time and we used planes. But we went ahead and did it. We needed to do it.”

broadening the tax base by incorporating evaders and avoiders into the tax structure poses a question mark on the fiscal sustainability of Morales' agenda of social incorporation, in particular in light of changing economic circumstances.

## 5. Uruguay

Since 2005, Uruguay advanced a series of major policy reforms oriented towards improving inclusiveness: industrial relations, health care reform, tax reform, a focused cash transfer program, and a transversal focus on job formalization. These were part of a well-crafted electoral FA program, largely negotiated “from below” via a well-organized urban militancy within the party and a strategic alliance with the labor movement. As in the case of Bolivia, the party’s organizational power itself derives principally from its strong ties with the party grass-roots bases and especially the labor movement, which provide a unique mass base and coalition of support.

The closeness of Uruguayan organized labor to the FA is a consequence of a process that began in the 1960s with, on the one hand, the unification of the labor movement and, on the other hand, the related process of coalition-formation of small leftist groups and parties—Socialists, Communists, Christian Democrats, and excinded groups from traditional parties. This party-labor alliance solidified in opposition to an authoritarian regime (1973-84), but became even more robust during their joint opposition to the neoliberal economic reforms in the 1990s (Altman 2000, Luna 2007). Since its foundation in 1971, the FA developed well-defined mechanisms for assuring strong grass-roots control over decision-making, including not only candidate selection but also program definition (Pérez et al. 2018, Rosenblatt 2018). In order to have a sense of how these mechanisms work, consider that the party electoral program is defined by the party congress, whose integration is defined by internal party elections where the party’s organized bases are over-represented with

respect to electoral vote distribution. Only once the program is defined, candidates are considered by the party congress for participation in the national mandatory primaries, and only after vowing on the acceptance of the pre-defined electoral program.

The FA grass-roots bases are organized territorially in committees (*comités de base*) with the participation of militants from very diverse organizations and origins (Luna 2014, Pérez et al. 2018). In parallel, the Communist party inside the FA, and to a lesser extent the socialists and other groups, have historically had close ties with the labor movement. Labor density since the 1960s has varied greatly because of the democratic breakdown and the structural adjustment period later on. Organized labor represented about 33 percent of the labor force during the period 1985-1989, in the immediate aftermath of the bureaucratic-authoritarian regime period. It declined consistently during the following decade; in 1991 collective wage bargaining was suspended, and labor density reached 14 percent in 2004, at the onset of the presidential election. Nevertheless, the PIT-CNT remained the only and uncontested labor central, which will prove to be an asset in terms of the movement coordination capacity with the FA, but also as a source of conflict internalization of the labor movement and moderation of demands. Also, although collective wage bargaining was suspended between 1991 and 2006, no legal regulations were imposed to constrain the future expansion of collective labor rights or labor's strategic capacity.

Between 2006 and 2010, with the reinstatement of collective wage bargaining and the 2007 labor reform expanding collective labor rights to previously excluded groups such as domestic workers and rural workers, organized labor density increased consistently up to 37 percent in 2012 and stayed mostly unchanged since then.

The alliance between the FA and PIT-CNT grew after the early 1990s while opposing several reforms, such as the education reform of 1996 and the social security reform of 1994, and in particular after the 2002 crisis. Once the FA reached office, an important segment of labor leaders

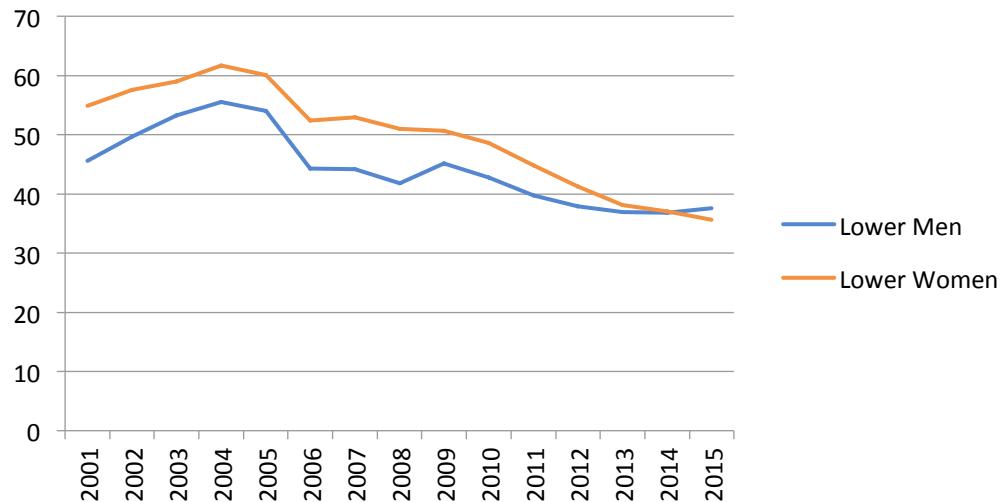
were given positions in government. The FA strengthened its ties with labor during the last two decades. This augmented labor's strategic capacity, but not without unfolding conflicts inside a labor movement that is unwilling to abandon the traditional capitalist critique. Becoming a partner in government did not come without challenges for the PIT-CNT, which experienced a double process of rapid expansion of its bases while many of the most experienced leaders migrated to government positions under the FA administrations. This produced increases in labor conflicts during the first FA administrations, as the ability of the PIT-CNT to educate and coordinate their rank and file was debilitated. An FA ex-member of parliament and union leader explained this in an interview: "When FA won the election in 2005, it took away good and strong leaders from PIT CNT, thus leaving the movement headless and with less experienced referents." (FA MP and ex-beverage union leader, personal interview 2010)

Labor leaders populated the ranks of the FA with regular members since early on. Once in office, labor leaders have become members of representative institutions and have also penetrated the executive branch and the state bureaucracy. As an example of this, four Labor Ministers during the three FA administrations have been former labor leaders. Eduardo Bonomi (2005-2009) was a fishing sector leader; Julio Baraibar (2009) was a pharmaceutical industry labor leader, and also a transport labor leader in Sweden while in exile; Eduardo Brenta (2010-2014) was a textile sector leader; and Ernesto Murro (2015-2019) is a former teacher and wood sector labor leader.

The congruence analysis for the Uruguayan case is based on two policy areas in which the FA governments attempted to intervene, with more or less success. The two areas are at the center of the incorporation process. The first area is industrial relations. As early as 2006, the first FA administration reinstated collective wage bargaining, which augmented labor strategy capacity in two ways: *directly* as labor got a chair in periodic tripartite mandatory wage councils; and *indirectly* because this measure –alongside the incorporation of rural and domestic workers, two traditionally excluded

groups, into collective bargaining— pointed to the heart of the incorporation process. Figure 6 illustrates effects of expanding collective wage bargaining to domestic workers on incorporation processes. The gender gap in terms of informality for the lower class closed off and eventually reverted as of 2015. This was a direct consequence of formalization efforts in this sector.

Figure 6. Informality gap by gender, lower class



Source: Elaborated by Alvarez-Rivadulla, Bogliaccini, Rossel and Queirolo (nd) based on Household Surveys.

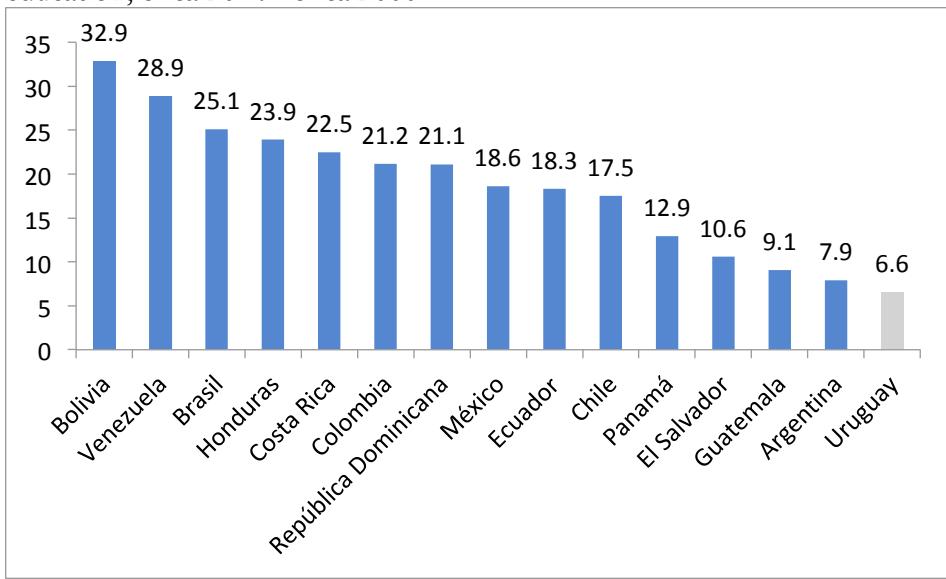
The 2007 labor reform, carried out by the first FA administration, consolidated the strong linkage between FA and the labor unions central, PIT-CNT. In a context of a monolithic opposition of the part of otherwise divided business sector, the labor movement played a decisive role in backing this reform process. It is also important to acknowledge the lack of internal conflicts about this reform in the FA, which stand in sharp contrast with the bitter conflict between the Astori and Mujica sectors around the contemporary tax reform. Differently from many other experiences in the region, such as Chile during the *Concertación* governments, center-left groups in the FA seriously concerned with macroeconomic stability provided crucial support to the return of centralized wage bargaining.

The second policy area analyzed is education, which is also at the heart of any incorporation process. Although there has been no education reform during the FA tenure in office (2005-2019), bitter conflicts between government and education unions within the PIT-CNT took part during the first year of Vazquez second term (2015), in occasion of the parliamentary bargaining over the five-year national budget. In this context, conflicts escalated as government attempted to put an end to what were conceived as unjustified strikes disrupting education activities. The conflict was ultimately resolved in an accord by which strikes were ended while government deposed its attempt to declare education an essential service (by which strikes are not permitted). However, the conflict showed two important processes for understanding the tensions of a party-labor government coalition: first, it signaled the limits of the incorporation process when colluding with powerful organized interests with narrow corporatist horizons. Uruguay has one of the worst attainment rates for secondary schooling in the region, with less than half of age correspondent cohorts achieving that goal. Alongside these poor figures relative to the country's development, Uruguay is the worst improver over the last fifteen years in the region (Figure 7). This is a problem at the heart of incorporation processes for the youth. Second, however, shows the importance of the PIT-CNT as a coordinator between government and the labor movement. The role of the PIT-CNT in managing tensions related to the education conflict proved important to both maintaining unity in the labor front as the party-labor coalition.

Teachers' unions in Uruguay have opposed any attempt to reform the education system ever since the conflictive but inclusive 1996 reform carried out by the Colorado Party. As attainment levels stagnated and quality and equality indicators show a continuous deterioration in the country, the education issue has begun to produce internal divisions inside the FA as well as important tensions inside the PIT-CNT. The main issues structuring the conflict refer to the organization of teacher's profession such as the form in which teachers are assigned to schools in the public system,

as well as to the incorporation of technology for pedagogical use. These represent a narrow corporatist defense of power strongholds, in a context in which the FA administrations doubled the education budget in terms of GDP. In particular, while the PIT CNT was able to mediate in the conflict, prospects of reform in education are nil.

Figure 7. Change in percentage of 20 to 24 years old population with completed secondary education, circa 2014 - circa 2000



Source: CEPAL-CEPALSTAT (2017)

Overall, as preliminary conclusions, the Uruguayan case clearly illustrates the tensions associated with bottom-up processes of incorporation, mostly for the governing party with strong societal linkages as well as for organized labor in its double role as vehicle for voicing labor demands and representing labor interests, and as partner in a party-labor governing alliance. Incorporation-oriented reforms advanced in areas where no previous policy existed and therefore vested interests – such as tax or conditional income transfers – or in settings where extension of benefits implied an immediate qualitative improvement for working and middle class families—such as health care reform. However, advancing incorporation in areas where entrenched organized insiders had to give up power proved much more difficult and tensioning for the party-labor coalition. This speaks to an

old Latin American challenge born from conservative modernization during the ISI period: the institutionalization of representation of narrowly defined interests in decision-making instances, such as the government of education (Bogliaccini 2018). However, it also speaks to the relevance of gradualism and coordination challenges when bottom-up incorporation processes unfold.

## 6. Conclusion [preliminary]

It may be too early to ponder the long-term effects of these two incorporation processes “from below” and to assess how they compare to trends in other countries of the region. However, these attempts towards building societies that are more inclusive are puzzling enough to merit a deeper examination. Perhaps the Bolivian experiment of the MAS is the most extreme in the region because it was a country governed historically by an ethnic minority, similarly to the experience of South Africa in the early 1990s, which experienced a massive shift in domestic power relations and achieved remarkable advances in the direction of political and social inclusiveness. Perhaps the Uruguayan experience is the most similar to European paths during the early and mid-20<sup>th</sup> century, which points to interesting directions for further research.

In any case, both cases are salient because, if nothing else, they represent a clear departure from policy-making during the implementation of structural adjustment policies led by parties with strong grass-roots connections—where the inability social allies to sustain mobilization facilitated co-optation, top-down policy-making, and the imposition of policies that ran directly against the interests of those parties’ social bases. The reverse appears to be at work in contemporary Bolivia and Uruguay, even though both cases embraced the neoliberal legacy of cherishing macro-economic stability as a pre-condition to any possibility of success. The comparison between these two cases is revealing because initial conditions could hardly be more diverse in regional terms. And, yet, both

cases achieved significant progress advancing an agenda of incorporation that expanded substantive citizenship rights—a process largely led “from below” via two similar mass-mobilizing parties with strong societal linkages.

Our comparison further supports the idea that if one analyzes the nature of party-society linkages, rather than policy orientation or party institutionalization, the differences between cases in the “moderate” and the “radical” strands of the Latin American left are less stark than we initially thought, and in fact there are striking similarities between cases usually classified in different typological boxes. If we want to have richer and more nuanced accounts of big-picture outcomes, like processes of incorporation, we need to explore those similarities further.

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