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Political Incorporation in Measures of Democracy: A Missing Dimension (and the Case of Bolivia)

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Political Incorporation in Measures of Democracy: A Missing Dimension (and the Case of Bolivia)

Since President Morales took office in Bolivia in early 2006, the country has undergone a complex political transformation. This profound process of change is, however, hardly reflected in established democracy indices, which by and large paint a picture of institutional continuity. Taking this puzzling observation as a starting point, the paper compares qualitative and quantitative assessments of Bolivia's contemporary political regime and argues that existing measures of democracy largely miss one key dimension that is crucial when it comes to analyzing (changes in) the quality of democracy: the issue of political incorporation. Specifically, the case of Bolivia shows that democracy indices mostly ignore important changes in terms of descriptive representation, party incorporation, and non-electoral participation. Privileging an individualist conception of liberal democracy, democracy measures downplay the relevance of collective forms of political representation and participation and, hence, the extent to which different social groups are or are not incorporated into the political system. As a result, these measures of democracy mostly do not "count" the recent progress in the political incorporation of important parts of the Bolivian population, which had been largely absent from the country's political institutions despite of two decades of continuous democratic rule.

Keywords: quality of democracy; transformation of democracy; democracy indices; democracy measures; democratization; political incorporation; Bolivia; Latin America

Introduction

When looking at the recent evolution of Bolivia's democracy through the lenses of established indices of democracy, a curious picture arises: Since the country's first indigenous president, Evo Morales, first took office in January 2006, Bolivia has basically seen continuity in its political regime, with some gradual shifts only and certainly without any kind of radical institutional change. This assessment is puzzling because it contrasts significantly with qualitative analyses, which generally agree that

Bolivia during the Morales government has underwent a process of profound political transformation – even if observers heavily disagree on how to evaluate these changes in conceptual and normative terms.

In this paper, I use the case of Bolivia to show that established measures of democracy, different as they are, share a common blind spot: they largely ignore a key dimension of political participation and representation that, in comparative-historical research, has been conceptualized as political incorporation.¹ This holds true not only for indices that rely on a procedural or institutionalist definition of liberal democracy but, by and large, also for those that have been deliberately designed to include also the substance and/or variety of democratic institutions and practices. Privileging an individualist conception of liberal democracy, I argue, all indices downplay the relevance of collective forms of political representation and participation and, hence, only in exceptional cases look at the extent to which different social sectors or classes are or are not incorporated into the political system.

As a result, these measures of democracy mostly do not “count” the fact that important parts of the Bolivian population, which had been largely absent from the country’s political institutions despite of two decades of continuous democratic rule, in recent years have experienced a dramatic process of political incorporation. This process of incorporation has been quite contradictory and limited in many ways. Still, there is little doubt that the ways in which previously marginalized social groups have been incorporated into Bolivian politics are of crucial relevance for the kind of political regime that has taken shape in the country and, thus, for the quality of Bolivian democracy. In highlighting the relevance of political incorporation for democratic quality, the case of Bolivia offers important insights for contemporary debates in the comparative study of democracy. It specifically suggests that attempts to broaden the

conception and measurement of (the quality of) democracy beyond a narrow focus on liberal, representative democracy should take collective, and class- or status-based patterns of representation and participation more seriously.

The article starts by reviewing studies that take stock of the nature of the political regime as it has emerged under president Morales. These qualitative assessments are, then, contrasted with quantitative measures as reported by the most important democracy indices. In a third step, the divergence between the two types of assessments is discussed, focusing on the blind spots in quantitative measures of democracy when it comes to the question of political incorporation. In the conclusion, I summarize the findings and situate them in the context of broader debates about the quality and the variety of democracy. Before beginning the analysis, however, a brief overview of the political changes during the Morales government is in order.

The MAS government: A brief overview

In December 2005, the union leader, coca grower and head of the leftist political movement *Movimiento al Socialismo* (MAS) Evo Morales was elected president of Bolivia by an absolute majority of the vote, becoming the country's first head of state of indigenous origin.² This electoral victory came after a wave of mass protests during which the MAS, and Morales personally, established themselves as the leading representatives of a diverse alliance of indigenous, peasant and urban popular movements. In line with key demands that had been put forward by these movements, the MAS government initiated a process of profound political change that included the restructuring of the political system via a constituent assembly.

Following a conflict-ridden process of constitution writing, a new constitution was finally approved in a referendum in January 2009 with more than 60 percent of support. In terms of the general features of the political regime, this new constitution

preserves the basic norms and institutions of liberal democracy, but complements representative institutions with direct-democratic and participatory mechanisms and adds far-reaching economic, social and collective indigenous rights to the usual catalogue of political and civil rights. In terms of direct and participatory forms of democracy, the constitution provides for referenda, citizens' legislative initiatives and the revocation of mandates, and grants "organized civil society" the rights to participate in the design of public policies as well as to exercise social control over state administration, public enterprises and institutions.³ At the same time, the constitution "reinforces executive power"⁴ and maintains a "strongly presidentialist" system.⁵

At the end of 2009, Morales was re-elected and the MAS won a two-thirds majority in the new parliament. Two years later, the judiciary was elected by popular vote, as envisaged by the 2009 constitution. Given its two-thirds majority in parliament, the MAS dominated the preselection of the candidates. As a consequence, the national courts, including the Supreme Court and the Constitutional Court, have generally been seen as overly close to the government. In a controversial decision by the Constitutional Court, Morales was authorized to run for a third term in the 2014 elections, which he again won by a wide margin. In February 2016, however, when the Bolivian people voted on a constitutional reform that would have allowed Morales to run for yet another term in 2019, a narrow majority rejected the governmental proposal. While the government accepted the defeat, the MAS decided to use an alternative strategy and, in September 2017, issued an appeal to the constitutional court to declare the term limit unconstitutional. At the time of writing, the decision was pending with the constitutional court (*La Razón*, September 29, 2017).

Qualitative assessments of Bolivian democracy under Evo Morales

Ever since Morales was first elected in 2005, the MAS government has been under

continued scrutiny by academic observers both within and outside Bolivia. Now, with Morales more than a decade in power and with the political institutions as designed by the 2009 constitution arguably in full operation, a series of studies have started to take stock of the political regime that has taken shape during the years of MAS rule. One important strand of contributions focuses on the question of the political regime type and discusses whether contemporary Bolivia should still be seen as a democracy or not and, more specifically, which subtype of democratic or authoritarian regimes might best characterize the country's political system. In general, there is widespread recognition that the political regime has changed significantly under the Morales government – but observers disagree strongly about the kind of regime that has emerged.

A series of scholars observe a process of de-democratization that has culminated in the establishment of an authoritarian regime. A prominent example are Steven Levitsky and James Loxton who observe the emergence of a competitive authoritarian regime.⁶ The key reasons given for this categorization include the elimination of “institutional checks on executive power”, the series of “criminal charges against numerous opposition leaders”, the mobilization of “social movement allies to intimidate opponents” as well as the series of “threats, physical attacks, and lawsuits against journalists and other critics”.⁷ The overall result is an “electoral regime in which widespread incumbent abuse skewed the playing field against opponents”.⁸

While stopping short of classifying the country as an authoritarian regime, Scott Mainwaring and Aníbal Pérez-Liñán's assessment of what they call “semidemocracy” in Bolivia is very similar. Drawing on Sebastián Mazzuca's notion of “plebiscitarian hegemonies”, they describe both the “semidemocratic” regimes in Bolivia and Ecuador and the “competitive authoritarian” ones in Nicaragua and Venezuela as “political regimes legitimized by popular vote but with a highly skewed electoral playing field,

crippled mechanisms of horizontal accountability and intolerance toward the opposition”.⁹

A more extreme position is taken by René A. Mayorga who explicitly rejects labelling contemporary Bolivia as a case of “delegative democracy”, “semi-democracy” or “competitive authoritarianism”.¹⁰ Because the government has progressively eliminated the limited pluralism that existed, liquidated the division of power, and broken with the rule of law, Bolivia – alongside Ecuador and Venezuela – is seen as a “full-blown authoritarian regime sui generis” (“un tipo de regimen autoritario pleno sui generis”).¹¹ The key issue that defines the border between competitive and full-blown (noncompetitive) authoritarian regimes is whether “constitutional channels exist through which opposition groups compete in a meaningful way for executive power”.¹² In contrast to Levitsky and Loxton and others, Mayorga argues that the skewing of the electoral playing field by the MAS government together with the weakness and fragmentation of the opposition has meant that there is no longer any meaningful challenge to the government at the national level (although there still may be some at the regional and local level).¹³

Yet, at the same time, Mayorga calls the authoritarian regimes in Bolivia, Ecuador and Venezuela “sui generis” because they hold elections and referendums – if “of a plebiscitary and manipulated nature” – in which marginalized rivals do compete. Pointing, *inter alia*, to the lost constitutional referendum in February 2016, he then suggests that “this very mechanism of plebiscitary electoral legitimation” has become “the Achilles heel” of the authoritarian regimes at hand – implying that electoral competition has still to be meaningful to some extent.¹⁴ In the end, therefore, his analysis largely corresponds to the notion of a “competitive authoritarian regime”.

Such a categorization has been explicitly rejected by scholars that still describe Bolivia as a democratic regime. Santiago Anria, for instance, has argued that “Bolivia remains a democracy, albeit one with liberal deficits and ‘delegative’ features”. The key observation behind this assessment is that “the integrity of core electoral institutions remains intact despite civil-liberties violations”.¹⁵

In the same vein, Maxwell Cameron has suggested that Bolivia represents a case of “delegative democracy” as defined by Guillermo O’Donnell, given that all conditions for an electoral democracy are present while a key element of liberal democracy (rule of law/horizontal accountability) is missing.¹⁶ Against the notion of an overly skewed electoral playing field, Cameron argues that the series of electoral successes of the MAS is due to “convincing and stable majorities” that have sustained the MAS government,¹⁷ and, indeed, few observers dispute the observation that Morales, until recently, has received majoritarian support among the population.¹⁸ This argument has also been confirmed by the 2016 referendum, which the government lost. This referendum, first, demonstrated that the opposition, as soon as it was able to capitalize on the weakening of popular support for the government and to unite behind a common demand, could successfully challenge the MAS through electoral means. Second, the electoral process has been shown to be reasonably free, transparent and fair.¹⁹ Third, as far as the electoral outcome is concerned, it is crucial to note that “Morales accepted his 2016 referendum loss”.²⁰

Franz Barrios, who offers a particularly sophisticated discussion of the different conceptual proposals, their theoretical premises, and the extent to which they (fail to) grasp important elements of the Bolivian regime, mostly agrees with this assessment. Barrios, like Anria and Cameron, argues that there are serious problems with horizontal accountability in contemporary Bolivia, but that electoral competition is not sufficiently

constrained so as to justify the label of a competitive authoritarian regime as defined by Levitsky and Way: Competition is “not only real, but still *fair*”.²¹ It is only for the contingent fact that the Constitutional Court in 2013 re-interpreted the constitution in an arguably unconstitutional way, thereby allowing Morales to run again in 2014, that Barrios sees the conditions for democratic elections overly undermined and, as a consequence, classifies Bolivia since then as a non-democratic regime.²²

This conceptual debate on how best to categorize Bolivia’s political regime is certainly an important one – not least because it also has political implications.²³ Still, what is most interesting for the topic at hand, is that these observers – different as their overall assessment of, and their normative take on, the Morales government clearly are – agree on three things: that there (a) has been a significant transformation of Bolivia’s political regime since Morales first took power in early 2006; that (b) this process has weakened or undermined key features of liberal democracy (in particular, in terms of institutional checks and balances and horizontal accountability); and (c) that there is something unusually participatory with the kind of political regime that has emerged under MAS rule.

With a view to the third observation, Levitsky and Loxton acknowledge that Morales – whom they, therefore, call a “movement populist” – “differed from full populists in that his linkage to supporters was more participatory than personalistic”, and that the MAS has “maintained mechanisms of consultation and accountability to the rank-and-file that had no parallel in other populist cases”.²⁴ Anria, Barrios, and Cameron likewise argue that one problem with applying O’Donnell’s concept of “delegative democracy” to contemporary Bolivia is the fact that it is much more participatory and/or responsive than the regimes O’Donnell had in mind. “So if Bolivia is a delegative democracy,” Anria argues, “it is one with ‘incorporating’ features that

make it more responsive to popular input than a ‘classic’ delegative regime would be”.²⁵ While Bolivia’s weak horizontal accountability is very much in line with O’Donnell’s concept, vertical accountability is not limited to episodic elections but is exercised continuously, in particular by relative autonomous social organizations that put pressure on the government, but also through new participatory institutions and mechanisms of direct democracy.²⁶

These participatory and inclusionary features are also highlighted by scholars who are not so much concerned with the overall (democratic) quality of Bolivia’s emerging political regime, but rather focus on the ways in which democratic institutions and practices in Bolivia have been transformed during the MAS government. María Teresa Zegada and Jorge Komadina, for instance, have shown that Bolivian parliaments at both the national and the subnational level have seen important improvements since 2005 in terms of descriptive representation: Parliaments now reflect much better the actual composition of Bolivian society in terms of social and ethnic groups than before, benefiting in particular traditionally marginalized groups such as indigenous people, peasants, and women.²⁷ Analyzing the construction of “intercultural democracy” in Bolivia, Fernando Mayorga and Moira Zuazo conclude that the broadening of representative democracy through mechanisms of direct and participatory as well as of communitarian democracy is an ongoing and open-ended process that confronts serious problems and limitations, in particular when it comes to their formal institutionalization, but that is still real and substantial.²⁸ And Alicia Lissidini, in her discussion of direct democracy in Latin America, has emphasized that “Bolivia maintains a high degree of citizen participation”, both in terms of protest activity and through formal channels such as elections and political parties.²⁹ With a view to the latter, the governing MAS party has been identified as a key vehicle through which traditionally marginalized social

sectors in Bolivia, and indigenous and peasant groups in particular, have been able to increase their access to the political system – even if in selective, inegalitarian and partially informal ways (see below).³⁰

As Santiago Anria and Eduardo Silva have explicitly suggested, the concept of political incorporation, as developed in the seminal work of Collier and Collier,³¹ is useful to grasp these changes in the patterns of representation and participation in contemporary Bolivia. Conceptually, the political incorporation of a given social sector can be defined as a multidimensional process that involves “the creation or reformulation of formal and informal rules and regulations that govern their participation in politics, and their connection to the policy process”.³² In the specific case at hand, the overall empirical observation is that Bolivia during the MAS years has witnessed a significant process of political incorporation of the so-called popular sectors, that is, of traditionally marginalized social sectors in both urban and rural areas.³³

Quantitative measures of Bolivian democracy under Evo Morales

As I will demonstrate in this section, important changes to Bolivian democracy as emphasized by the qualitative studies reviewed above are not at all grasped by quantitative measurements of democracy. The former, as seen, largely agree that Bolivia’s political regime has seen a profound but contradictory process of change that combines a weakening of the liberal component of democracy with significant improvements in terms of a political incorporation of traditionally marginalized social sectors. Established indices of democracy, in contrast, suggest a basic continuity of the political regime inherited by the Morales government, with only limited and gradual changes that mainly point in an illiberal direction. Most quantitative measures, thus, capture the deterioration in certain dimensions of liberal democracy, but they largely

miss the substantive changes in terms of participation and representation. Interestingly, with a few exceptions, this blind spot also characterizes indices – such as the Varieties of Democracy project – that explicitly include non-liberal conceptions of democracy.

According to Freedom House, Bolivia continues to be an “electoral democracy” which is “partially free” only. The two indicators that measure political rights and civil liberties, respectively, have seen no change during the years of the Morales government: On scales from 1-7 (with 1 being the best rating), Bolivia continuously rates 3 on both scores.³⁴ When looking at specific sub-categories, there are some gradual shifts: decreases in “political pluralism and participation”, “associational and organizational rights” as well as “rule of law”, but improvements in “functioning of government”.³⁵

The Polity IV index, which focuses on key institutional features of representative democracy, identifies a gradual, but limited de-democratization: In 2009, with the adoption of the new constitution and the reelection of president Morales, the Bolivian regime was downgraded from +8 to +7 on the Policy IV scale, which ranges from -10 to +10 and considers regimes of +6 or more as “democracies”. This change reflects a lower rating in the category of “executive constraints” (which presumably reflects the combination of weak judicial controls of the executive with the two-thirds majority of the governing MAS in the newly elected legislative assembly). Since then, however, Polity has seen no further changes and Bolivia, thus, remains safely in the category of democratic regimes.³⁶

The Bertelsmann Transformation Index (BTI), in contrast, reports gradual improvements in the status of Bolivian democracy, after an initial worsening in the context of the contested process of constitutional reform.³⁷ In terms of the specific dimensions measured by the BTI, the most significant improvement is reported in the area of “political and social integration” (in particular, in the sub-category “approval of

democracy”).³⁸ Overall, however, Bolivia basically remains in the same regime category, a “defective democracy” in the terminology used by the BTI.³⁹

The Varieties of Democracy project (V-Dem), which provides several indices based on different conceptions of democracy, generally confirms this picture of gradual, but complex developments. The overall trend, here, is again one of a slight decrease in the quality of democracy. More specifically, the indices measuring “electoral democracy” as well as the additional components bringing in “liberal” and “delegative” conceptions of democracy report gradual decreases, whereas the “egalitarian” and the “participatory” component indices show improvements.⁴⁰ The decreases are particular due to lower scores for “clean elections” (because of concerns relating to the autonomy and the capacity of the election management body), “freedom of expression”, and “freedom of association” (electoral component); for “legislative constraints on the executive” (liberal component); as well as for “respect counterarguments” (deliberative component). The increase in the egalitarian component reflects the assessment that the “equality in respect for civil liberties” has improved for different “social groups” and disadvantaged “social classes”. Within the participatory component, the “direct popular vote index” and the “regional government index” improve significantly after 2005, even if both decrease again in recent years. The sub-index that most directly touches on the question of non-electoral political participation (“civil society participation index”) also increases gradually, and likewise decreases again in recent years. More specifically, it is the extent to which civil society organizations are consulted by policymakers that is seen to have significantly increased between 2005 and 2009.

Finally, the *Índice de Desarrollo Democrático* de América Latina (IDD-Lat) also measures different dimensions of democracy, focusing on Latin America only. In the overall IDD-Lat ranking, Bolivia has improved significantly in recent years, after an

initial deterioration between 2005 and 2009. Since 2014, Bolivia has been categorized as a country with a “medium” level of democratic development (instead of previous “low” or even “minimal” levels) and is now clearly above the Latin American average.⁴¹ When looking at the sub-indices that measure the political regime properly speaking,⁴² IDD-Lat reports almost continuous improvements in the dimension called “citizens’ democracy” (*democracia de los ciudadanos*), which assesses respect for right and liberties. The key driver, here, has been dramatic increases in the representation of women in the government (including parliament and the judiciary). In the dimension called “institutional democracy” (*democracia de las instituciones*), in contrast, scores had initially fallen during the first years of the Morales government, but have recently risen again to slightly surpass the 2005 level. This latter re-increase is basically due to improvements in terms of political stabilization/normalization; continuous deficits are particularly observed in the areas of “perception of corruption” and “accountability”.⁴³

When comparing these democracy indices with the diverse qualitative assessments summarized above, what is striking is, first, the fact that they converge in reporting a basic continuity of Bolivia’s democratic regime. While most quantitative measures do identify an illiberal trend (gradual decreases in certain civil liberties, horizontal accountability and the rule of law), none of the measures supports those liberal scholars that see Bolivia under Morales moving into the camp of authoritarian regimes. The second difference is that the peculiarly participatory or inclusive nature of Bolivia’s contemporary political regime, which is emphasized by qualitative studies, is almost entirely missing from the picture painted by the democracy indices. In the following section, I will discuss in detail this latter divergence between quantitative and qualitative assessments of Bolivian democracy.

Divergence and blind spots in assessments of democratic quality

The advances in terms of popular sector incorporation that are identified in qualitative studies on contemporary Bolivia concern three main dimensions: (1) descriptive representation; (2) party incorporation; and (3) non-electoral participation. In this section, I discuss the qualitative findings on what has changed in Bolivia in these three dimensions of political incorporation and confront them with the (limited) extent to which they are taken into account by quantitative measures. In doing so, I also show general blind spots that characterize the ways in which established democracy indices assess (changes in) the quality of democracy regimes. As will be seen, all indices, if to varying degrees, privilege an individualist conception of liberal democracy, downplay the relevance of collective forms of political representation and participation and, hence, only in exceptional cases look at the extent to which different social sectors or classes are or are not incorporated into the political system.

The most obvious and least controversial change that observers of Bolivian democracy have noted concerns the dimension of *descriptive representation*, that is, the extent to which the composition of state institutions corresponds to or resembles the composition of the political community at hand.⁴⁴ With a view to the composition of Bolivian parliaments at the national and subnational level, empirical research reveals a dramatic increase in the presence of previously underrepresented groups such as peasants, indigenous peoples and women as well as formal and informal sector workers.⁴⁵ Corresponding shifts can be also observed in the executive level,⁴⁶ the judiciary⁴⁷ and the state bureaucracy.⁴⁸

The empirical correspondence between the representatives and those that are to be represented is certainly only one dimension of democratic representation,⁴⁹ and descriptive representation does, in and of itself, obviously not guarantee more

representative policymaking in terms substantive representation or responsiveness.⁵⁰

Still, it is hard to dispute that it says *something* about the quality of Bolivian democracy whether in this predominantly indigenous and poor country indigenous and socioeconomically less well-off people are actually present in the official political arena in a more than marginal position. And yet, this question is all but ignored by the democracy indices analysed above.

The index that comes closest to incorporating the issue at hand is V-Dem. Most importantly, two V-Dem indicators assess the relative “political power” in terms of both “socioeconomic position” (whether wealthy people have more power) and “social groups” (how equally distributed political power is according to social groups).⁵¹ Both indicators show improvements for Bolivia since 2005, but the increases remain very limited only and, thus, do not appropriately reflect the significant changes reported above. This is different for one variable that directly measures what is at stake here: “Representation of disadvantaged social groups [in the national legislature]”. The values assigned to Bolivia adequately suggest that the situation of disadvantaged social groups in the country, which had remained worse than “highly under-represented” until 2005, changed to a little better than “slightly under-represented” (2016). The extent of this improvement in the rating is comparable only to the introduction of universal suffrage after the 1952 revolution and, thus, signals a dramatic change in Bolivian democracy. Yet, and this is remarkable given the breadth and complexity of V-Dem’s democracy measurement, this indicator is not included in any of the democracy indices.

As mentioned above, IDD-Lat’s “citizens’ democracy” is the only index that reports a significant improvement in the quality of Bolivia’s democracy. Interesting, as noted, this is mainly due to the fact that this index includes an indicator for the representation of women in the executive, legislative and judicial branches of

government. Relevant as this gender dimension certainly is, it makes it all the more striking that the political representation of other traditionally underrepresented social groups is not at all taken into account.

The focus on descriptive representation in state institutions grasps, however, only one dimension of the political incorporation of the popular sectors during the Morales government. As mentioned above, the governing MAS has been a key channel of popular sector incorporation, which points to the second dimension: *party incorporation*.⁵² With the rise of the MAS to political power, social organizations and movements that represent important segments of the socioeconomically disadvantaged majority of the Bolivian population have gained access to the political arena and saw their actual influence on policymaking increase significantly. It is important to note that this political incorporation of popular sector claims and actors was far from egalitarian or universal. First, the national peasant organizations, which founded the party as their “political instrument”, have had privileged political access through and inside the MAS. The country’s explicitly indigenous organizations, non-peasant union federations and urban popular groups also benefited from the rise of the MAS, but in subordinate positions and only as long as they remained allied with the government. Second, these inegalitarian features, which have characterized popular sector incorporation through the MAS, are further reinforced by the prevalence of informal mechanisms, including clientelism, cooptation and personalist relationships. Third, the actual political influence of popular sector organizations has been constrained by the important role of a technocratic elite that has occupied key positions in the MAS government and, in particular, has dominated important policy areas such as economic policymaking.⁵³

The precise effect of the pattern of popular sector incorporation enabled by the MAS in contemporary Bolivia on the quality of the country’s democracy is, therefore,

ambivalent and contested. But, systematically speaking, it should be a relevant question whether the party system in a given country creates linkages between the population and the political system that enable a reasonably even political incorporation of social groups. Whether a party exists that systematically incorporates socioeconomically disadvantaged groups is certainly important in this regard. Again, it is striking that democracy indices hardly assess this arguably crucial question.

In this case, it is the Bertelsmann Stiftung's democracy index that pays certain attention to this issue in its democracy measurement. The BTI includes a question on the extent to which countries have "a stable and socially rooted party system able to aggregate societal interests". Yet, whether a given party system enables the participation and representation of all relevant social groups or classes, including disadvantaged ones, is not to be considered.⁵⁴ As a result, the indicator has seen only marginal changes in recent years. In the case of V-Dem, several variables focus on political parties, but none actually on questions of incorporation or interest intermediation – and none is included in V-Dem's democracy indices anyway.⁵⁵

The third feature that is generally highlighted when it comes to emphasizing the peculiar participatory or inclusive nature of contemporary Bolivian democracy refers to *non-electoral forms of political participation*, that is, to formal and informal mechanisms that, in addition to individualist types of participation through elections and referendums, enable direct and collective forms of civil society participation. At the formal level, the 2009 constitution and a corresponding law require all state entities, public enterprises and institutions to establish procedures through which civil society organizations can participate in planning processes and exercise social control. As a consequence, new avenues for participation have been introduced that explicitly aim at directly involving "organized civil society", even if the constitutional rights to

“participation and social control” are implemented in heterogeneous, but generally relatively restricted ways.⁵⁶ More important are, therefore, the government’s largely informal practices of negotiation and dialogue with civil society organizations. These practices offer direct access to the political arena to popular sector organizations which are either allied with or able to put pressure on the government.⁵⁷

As these non-electoral forms of participation operate in inegalitarian and largely informal ways, their consequences for the quality of Bolivian democracy are, again, far from clear-cut. In addition, in this dimension, the actual amount of change since 2006 is much harder to tell because the extent of civil society participation – formal at the local level, informal and protest-driven at the national level – has already been relatively high in Bolivia before Morales became president.⁵⁸ Still, the question whether there are broadened channels for and/or increasing levels of non-electoral participation by civil society groups is arguably a relevant one when it comes to assessing changes in the quality of a given democracy.

In this case, there is at least one democracy index that includes corresponding measurements. As mentioned above, V-Dem has a specific “Civil society participation index”. This index encompasses, inter alia, an indicator that assesses the extent to which “major civil society organizations (CSOs) [are] routinely consulted by policymakers”.⁵⁹ The Bolivia rating for “CSO consultation” indeed increases significantly after 2005, but from 2010 onwards gradually decreases again – a trend that is in line with the qualitative assessments reported above. As concerns the issue of political incorporation, however, it is remarkable that the index ignores the question which social groups actually participate in and through these “major” CSOs (the exception being, again, the participation of women). At first sight, the BTI’s indicator “Interest groups” seems better able to grasp this issue in that it “addresses the representation of societal interests

in the political system”. The problem, here, is the normative bias of the BTI which emphasizes harmony, cooperation and non-polarization. Therefore, a broadening of the “spectrum of interest groups” and their “capacity to incorporate all (competing) social interests” is only assessed positively if this occurs in cooperative terms and without increasing the risk of polarization.⁶⁰ As a result, the indicator does not vary at all during the first years of the Morales government (reflecting the fact that increasing levels of non-electoral participation were accompanied by rising polarization) and later increases slightly (when non-electoral participation arguably went down but polarization decreased even more).

Conclusion

The analysis presented in this article shows that established democracy indices largely ignore an issue that, in comparative-historical research, has been conceptualized as political incorporation: the extent to which different social groups or classes are actually enabled to participate in politics and connect with the policy process.⁶¹ Drawing on the case of Bolivia, I have argued that this question of political incorporation is key when assessing changes in the quality of democratic regimes. This finding is not very surprising for ratings such as Freedom House and Polity, which are deliberately based on a liberal conception of representative democracy – in these cases, it is rather striking that they identify much less of a deterioration of liberal democracy than liberal scholars who see Bolivia turning to an authoritarian regime. Of interest for this article is, however, that also indices such as BTI, IDD-Lat and V-Dem, which put forward broader perspectives on democracy, have difficulties in grasping collective forms of participation and representation, in particular when it comes to socioeconomically disadvantaged social groups.

A review of qualitative studies on the transformation of democracy in contemporary Bolivia revealed three specific blind spots in these quantitative assessments. In terms of (1) *descriptive representation*, Bolivia since 2005 has experienced dramatic improvements in the political representation of traditionally disadvantaged social groups. However, even the two indices that pay some attention to this issue miss the extent of the changes: IDD-Lat looks at the political representation of women only, while V-Dem deliberately excludes the key variable “Representation of disadvantaged social groups” from its democracy measurement. In terms of (2) *party incorporation*, Bolivia’s governing MAS party has significantly broadened access to the political arena for important segments of the popular sectors. Here, BTI is the only index that somehow considers the issue – but without being sensitive to the key question of who is actually incorporated by the party system. In the dimension of (3) *non-electoral participation*, Bolivia has seen important, if complex, changes in the patterns of interaction between the state and civil society organizations. Here, V-Dem’s “civil society participation index” comes closest to including an appropriate measure – but, again, fails to consider which social groups actually participate in and through existing civil society organizations.

These findings generally confirm the well-known critique levelled against liberal theories of democracy in the tradition of Schumpeter and Dahl by proponents of some kind of participatory democracy: that the former limit participation to individual participation in elections and thereby deliberately constrain meaningful popular participation in politics.⁶² Given the disenchantment with democracy as well as the experimentation with democratic innovations that scholars have observed in Europe and, most notably, in Latin America, this critique has recently seen an important revival. The present contribution adds to the series of contributions that have emphasized – not

least on the pages of this journal – that we should also consider direct, deliberative and participatory mechanisms of democracy when trying to account for the (changing) quality of democratic regimes.⁶³ But, by bringing in the question of the political incorporation of popular sectors, it highlights the relevance of collective, and social class- or status-related patterns of democratic participation and representation that are frequently marginalized even in these debates.⁶⁴

That the concept of political incorporation has been developed and used by scholars working on Latin America plausibly reflects the fact that such collective logics of participation have been particularly important in this region's highly unequal societies, where democratic regimes have coexisted with persistent, if not increasing, political marginalization of large parts of the population. Also the debate on participatory democracy in Latin America has more seriously engaged with collective forms and patterns of participation.⁶⁵ The issue, however, is of general relevance for comparative research on the quality of democracy, including its measurement. In a recent analysis of European democracies, for instance, Wolfgang Merkel and colleagues have identified “an increasing dropout of the lower classes from political participation and a trend to neglect the representation of their interests in parliament”, two related processes that signal a deterioration of democratic quality but are not reflected in mainstream indices.⁶⁶ In the same vein, the introduction to a special issue on “Measuring the Quality of Democracy” mentions recent calls to improve quality-of-democracy indices by including “descriptive representation of gender and minority groups, that is, the social stratification of legislatures” as well as “a wider range of procedures and structures that constrain or inform elite decision-making between elections, for example via active interest- and civil society groups”.⁶⁷ As this article suggests, the concept of political incorporation offers a promising way to systematically

integrate these issues into the conceptualization and measurement of the varying qualities of democratic regimes.

Notes

¹ The key book introducing the concept is Collier and Collier, *Shaping the Political Arena*.

Recently, it has been taken up by scholars in order to make sense of the so-called leftist turn in Latin America. See Luna and Filgueira, "The Left Turns"; Roberts, "The Mobilization of Opposition"; Silva and Rossi, *Reshaping the Political Arena*.

² The following draws on Wolff, "Towards Post-Liberal Democracy," 40-41. For overviews, see also Anria, "More Inclusion, Less Liberalism"; Farthing and Kohl, *Evo's Bolivia*; Mayorga, *Incertidumbres tácticas*; Postero, "The Struggle"; Zegada et al., *La democracia*.

³ See Wolff, "Towards Post-Liberal Democracy".

⁴ Anria, "More Inclusion, Less Liberalism," 102.

⁵ Zegada et al., *La democracia*, 124.

⁶ Levitsky and Loxton, "Populism and competitive authoritarianism." See also Sanchez-Sibony, "Democratic Breakdowns"; Weyland, "Latin America's Authoritarian Drift."

⁷ Levitsky and Loxton, "Populism and competitive authoritarianism," 117-118.

⁸ Levitsky and Loxton, "Populism and competitive authoritarianism," 107. See also Weyland, "Latin America's Authoritarian Drift," 19, 24. It should be noted that description of political developments under Morales as offered by Levitsky and Loxton also includes factual statements that are empirically wrong (if by omission). Most notably, the authors write that the MAS "pushed through its own draft [constitution]" in the Constituent Assembly and, then, continue: "The new constitution was approved via referendum in 2009 [...]" (118) What is missing in between is the crucial negotiations with the opposition that led to a far-reaching revision of the draft constitution and a two-thirds majority in Congress. This misrepresentation, however, does not affect their overall assessment, which is based on a particular and certainly contestable reading of political events in Bolivia, but which is generally consistent with their normative (liberal) premises and their usage of the term "competitive authoritarianism."

⁹ Mainwaring and Pérez-Liñán, "Cross-Currents in Latin America," 116.

¹⁰ R. Mayorga, "Populismo autoritario," 60-66.

¹¹ *Ibid.*, 66.

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- ¹² Levitsky and Way, *Competitive Authoritarianism*, 6-7.
- ¹³ R. Mayorga, "Populismo autoritario," 64.
- ¹⁴ *Ibid.*, 47.
- ¹⁵ Anria, "More Inclusion, Less Liberalism," 100.
- ¹⁶ Cameron, "The Myth of Competitive Authoritarianism," 11.
- ¹⁷ *Ibid.*, 11.
- ¹⁸ See Anria, *Social Movements*, 100.
- ¹⁹ See F. Mayorga and Rodríguez, *Urnas y democracia directa*.
- ²⁰ Anria, "More Inclusion, Less Liberalism," 100. As mentioned above, the MAS later decided to turn to an alternative strategy and, against the popular will as expressed in the 2016 referendum, asked the constitutional court to change the constitution anyway (*La Razón*, September 29, 2017). But notwithstanding the impact that such a possible constitutional change might have on the quality of Bolivia's political regime, it would not (somehow retroactively) undermine the observation that electoral competition in the context of the 2016 referendum respected democratic standards.
- ²¹ Barrios, "Qué tipo de régimen político," 92 (emphasis in the original).
- ²² See Barrios, "Qué tipo de régimen político," 86-92. Coherent as Barrios' reasoning may be, the result appears somewhat problematic. Counterfactually assuming that Morales in 2013 would have been successfully authorized to run for another presidential term by way of an undisputedly constitutional procedure (including a constitutional referendum), Bolivia's political regime today would probably not look very different from what it actually looks like. Still, then, Barrios would classify it as a democracy.
- ²³ See Cameron, "The Myth of Competitive Authoritarianism," 15-17.
- ²⁴ Levitsky and Loxton, "Populism and competitive authoritarianism," 117.
- ²⁵ Anria, "More Inclusion, Less Liberalism," 100. Cameron, likewise, argues that Bolivia under Morales can be considered an example of "delegative democracy", which is, at the same time, "a more participatory and inclusive democracy". Cameron, "The Myth of Competitive Authoritarianism," 10.
- ²⁶ See Anria, *Social Movements*, 101, "More Inclusion, Less Liberalism," 104, 106; Barrios, "Qué tipo de régimen político," 84-85; Cameron, "The Myth of Competitive Authoritarianism," 13-14; De la Torre, "In the Name of the People," 28, 44.
- ²⁷ Zegada and Komadina, *El espejo de la sociedad*.
- ²⁸ F. Mayorga and Zuazo, "Democracia intercultural," 370-377. See also Exeni, "Elusive Demodiversity"; F. Mayorga, *Incertidumbres tácticas*.
- ²⁹ Lissidini, "Paradojas de la participación," 94.
- ³⁰ See Anria, *Social Movements*; Do Alto and Stefanoni, "El MAS"; Silva, "Social Movements"; Zegada et al., *La democracia*.

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- ³¹ Collier and Collier, *Shaping the Political Arena*.
- ³² Silva, “Reorganizing Popular Sector Incorporation,” 95.
- ³³ See Anria, *Social Movements*; Anria, “More Inclusion, Less Liberalism,” Silva, “Reorganizing Popular Sector Incorporation”; Silva, “Social Movements”.
- ³⁴ Most recent data is from the 2017 Freedom in the World index, which evaluates the situation in 2016 (see www.freedomhouse.org).
- ³⁵ I, here, mention only sub-categories with changes of more than 1 point (on scales that range from 0-12 or 0-16).
- ³⁶ Most recent data is for 2016 and has Bolivia still at the +7 level (see www.systemicpeace.org/polityproject.html).
- ³⁷ Full disclosure: This author is one of the external reviewers that participate in the Bolivia assessment of the BTI.
- ³⁸ Another significant improvement is reported in the sub-category “effective power to govern”.
- ³⁹ The “democracy status”, which is measured on a scale from 1-10, was at 6.1 before Morales took over (BTI 2006, reflecting events until January 2005), slightly decreased in the following years (5.8 in the BTI 2008 and 6.0 in the BTI 2010), but has than risen to around 6.5 (BTI 2014, 2016, see www.bti-project.org).
- ⁴⁰ Between 2005 and 2016 (and on scales between 0 and 1), Bolivia’s electoral democracy index changes from 0.77 to 0.61, the liberal component index from 0.67 to 0.60, the deliberative component index from 0.86 to 0.73, the participatory component index from 0.55 to 0.57, and the egalitarian component index from 0.52 to 0.64 (2015) (see www.v-dem.net).
- ⁴¹ On IDD-Lat’s overall scale (from 0-10), Bolivia was rated 3,528 in 2005, 2,733 in 2012 and 5,218 in 2016. See www.idd-lat.org.
- ⁴² The overall ranking also includes two indices (“social” and “economic democracy”) that go way beyond usual measures of democracy (and analyze the governmental performance with a view to human and economic development, respectively).
- ⁴³ The score for “citizens’ democracy” has almost continuously increased from 3,861 (2005) to 5,959 (2016). The rating for “institutional democracy” was at 4,734 in 2005, temporarily fell to around 3,000 in 2006-2010, but afterwards rose again to reach 4,765 in 2016.
- ⁴⁴ See Pitkin, *The Concept of Representation*, chapter 4.
- ⁴⁵ Zegada and Komadina, *El espejo de la sociedad*.
- ⁴⁶ Espinoza, *Bolivia*, 130-156; Zegada et al., *La democracia*, 243-249.
- ⁴⁷ F. Mayorga, *Incertidumbres tácticas*, 44-46. It is important to note that the significant increase in indigenous and female judges at the highest level of the judicial branch is the direct result of the 2009 constitution which introduced the direct election of the members of the national courts.
- ⁴⁸ Soruco, Franco, and Durán, *Composición social del estado plurinacional*.

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- ⁴⁹ See Pitkin, *The Concept of Representation*.
- ⁵⁰ Zegada and Komadina, *El espejo de la sociedad*, 15-22.
- ⁵¹ V-Dem Institute, *V-Dem Codebook*, 259-260. In addition, V-Dem's "equal protection index" measures whether "the state grants and protects rights and freedoms evenly across social groups". Ibid., 65.
- ⁵² On this and the following, see Anria, *Social Movements*; Anria, "More Inclusion, Less Liberalism"; Do Alto and Stefanoni, "El MAS"; Silva, "Reorganizing Popular Sector Incorporation"; Silva, "Social Movements".
- ⁵³ On these limitations, see also Wolff, "Business Power and the Politics of Postneoliberalism".
- ⁵⁴ Bertelsmann Stiftung, *BTI 2016: Codebook*, 23.
- ⁵⁵ Most notably, the "Party institutionalization index" includes an indicator „Party linkages“, which however measures merely the "form of linkage" (e.g., "clientelistic", "local collective", "policy/programmatic"), V-Dem Institute, *V-Dem Codebook*, 133.
- ⁵⁶ F. Mayorga and Zuazo, "Democracia intercultural," 347-354.
- ⁵⁷ Anria, *Social Movements*, chapter 4; Silva, "Reorganizing Popular Sector Incorporation," 100-103. See also F. Mayorga and Zuazo, "Democracia intercultural," 349-353; Lissidini, "Paradojas de la participación," 94; Wolff, "Towards Post-Liberal Democracy," 45-46.
- ⁵⁸ See, F. Mayorga and Zuazo, "Democracia intercultural"; Thede, "Democracy agency."
- ⁵⁹ V-Dem Institute, *V-Dem Codebook*, 247.
- ⁶⁰ Bertelsmann Stiftung, *BTI 2016: Codebook*, 23. The BTI also includes a question on "Civil society participation", but this criterion is not included in the democracy index but part of the index that assesses the management performance of an individual government. Ibid., 42.
- ⁶¹ Silva, "Reorganizing Popular Sector Incorporation," 95.
- ⁶² See Macpherson, *The Life and Times*; Pateman, *Participation and Democratic Theory*.
- ⁶³ See, for instance, Altmann, "Bringing direct democracy back in"; Cameron et al., *New Institutions*; Geissel and Newton, *Evaluating Democratic Innovations*; Munck, "What is Democracy?".
- ⁶⁴ As seen, even V-Dem, a set of indices that explicitly acknowledges the variety of democracy, is quite weak when it comes to such collective and class- or status-related dynamics.
- ⁶⁵ See, for instance, Cameron et al., *New Institutions*, Minnaert and Endara, *Democracia participativa*.
- ⁶⁶ Merkel, "Crisis of Democracy," 23.
- ⁶⁷ Geissel et al., "Measuring the quality," 575. This is reflected, for instance, in the Democracy Barometer which attempts to more seriously consider the quality of representation and participation. See Merkel, "Crisis of Democracy," 18-19.

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