INTRODUCTION

THE ISSUE OF PATRONAGE IN LATIN AMERICA

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This book is about the practice of patronage in Latin American public administration. By *patronage* we mean the political actors' power to discretionally appoint officials in public administration irrespective of the legality of the appointment and the merits of the appointee. This practice has a long history, including in the (now) consolidated democracies. For example, British public administration prior to the 1870s was heavily populated by patronage appointments.[1] In the United States the "spoils system" associated with Andrew Jackson waned only slowly after the passage of the Pendleton Act in 1883. And this practice has persisted over time, and is endemic in many countries of the Global South.

In contemporary governance, the conventional model of public sector employment stresses the importance of merit recruitment and an absence of political influence over the public bureaucracy. The principle of "neutral competence" is accepted as the standard by which to assess public personnel systems, for both efficiency and ethical reasons (Aberbach and Rockman 1994; Dahlström and Lapuente Giné 2017). The assumption is that hiring and promoting people because of their demonstrable abilities will result in the "best and brightest" working in government and providing high-quality services to the public. These individuals would make their decisions on the basis of objective, legal criteria rather than politics and provide better service to the public.

Scholars such as Merilee Grindle (2012) have pointed out that despite our admiration for merit systems in public administration, patronage remains an important and often successful means of filling posts in the public sector. It is not inherently evil, and needs to be examined carefully, as she did for ten Latin American countries. Her foundational work demonstrates the centrality of patronage for Latin American countries, even in the presence of pressures for change, but also highlights how that change can be produced.

There are two major issues with the dominant focus on the merit system as the standard for employment in the public sector. The first is an empirical problem. This problem is that all administrative systems have some positions that are not allocated on the basis of merit alone. Everyone uses patronage; the questions are how much and for what purposes. Even administrative systems that have prided themselves on being merit based do have some political appointments, and the available evidence is that the number of political appointees is increasing (Hustedt and Salomonsen 2014). And in many countries of the Global South levels of patronage appointments remain high and relatively unaffected by efforts to reform government (Arriola 2009; Grindle 2012). Therefore, these appointments can have a profound impact on governance within these countries.

The second issue is that patronage is not a simple concept or a single pattern of appointing people for administrative positions. Rather, there are many different ways of making these appointments and many different reasons for making the appointments. These differences occur across countries and also may occur even within the same country. For example, an appointee within the Casa Rosada in Buenos Aires or Los Pinos in Mexico City may be there to assist the president of the respective country in pursuing his or her political goals. On the other hand, a trained economist in the Ministry of Finance in either country may be there as a policy expert, not a political advisor. And, as we will point out below, the appointee may be there because of his or her personal connections with a political leader or because of connections with a political party.

Understanding patronage therefore requires careful research. That research must examine the tasks being performed by political appointees, and those tasks must be related to the capacities of the career civil service. We can divide the tasks performed by appointees between those that are primarily political and those that are policy focused, but within those categories there are a number of different roles that the appointees can play. And especially the political tasks should be considered as supplementing or substituting for the roles of career civil servants in governing.

And it also requires a clear conceptualization of patronage, and its relationship with other concepts used to describe the use of political power to control elements of the state. First, we need to place the practices of patronage within a broader understanding of the politicization of the public sector (Peters and Pierre 2004; Neuhold, Vanhoonacker, and Verhey 2013). Appointing people to positions within the public sector is an important mechanism for controlling the bureaucracy, but there are other ways that, though perhaps more subtle, can also be effective.

In summary, studying patronage is important for understanding how government functions in many countries, including the countries of Latin America. Without a clear understanding of the ways in which patronage is used, and its effects on governance, we are likely to make a number of false conclusions about the governments of Latin America. Perhaps most importantly, we may wrongly conclude that patronage is a manifestation of corruption, while in reality it may be a means of recruiting highly skilled individuals to work in government when they otherwise would not.

CONCEPTUALIZING PATRONAGE

We define *patronage appointments* as the power of political actors to appoint individuals by discretion to nonelective positions in the public sector, regardless of the legality of the decision and the merits of the appointee (Kopecký, Mair, and Spirova 2012). The definition does not make assumptions about the motivations for the appointments, the roles played by appointees, their professional capabilities, or the impact of patronage appointments on the quality of public administration. It covers different modalities of patronage that can be distinguished in terms of scope, motivations, and roles and brings together two streams in the study of discretional appointments, usually described as clientelism in less-developed and transitional political systems and as the politicization of the public administration in Western European and North American systems (Peters 2013).

While there is a tendency in the literature to use the terms *politicization*, *patronage*, and *clientelism* interchangeably, the three concepts are analytically different. Politicization is a rather broad concept, and includes a range of mechanisms through which political actors attempt to influence public administration (Peters 2013). It can refer to the selection of appointees for positions in government on political grounds—patronage per se—but also to other, subtler, ways in which political actors attempt to shape the behavior of public servants (Bach, Hammerschmid, and Löffler 2020).

As Kopecký et al. (2016) note, patronage includes appointments that are

clientelist in nature as well as others in which appointments are used for purposes besides clientelist exchanges. Clientelism has been narrowly defined as the exchange of public sector *jobs* for electoral support (Roniger 1994; Stokes 2005; Stokes et al. 2013; González-Ocantos and Muñoz 2017; Hicken 2011) and, more broadly, as the particularistic allocation of public resources in exchange for loyalty, services, and political support (Piattoni 2001). While the politicized and discretional nature of the appointment is a shared characteristic with clientelism, politicians make appointments for a range of motives other than electoral support, such as the need for technical advice and expertise or the use of patronage appointments as a tool of coalition management. Appointees also perform a variety of roles other than electoral brokers. These include, among others, policy design and implementation and the control of the public sector bureaucracy.

Clientelism as a means of providing public jobs for electoral purposes is generally associated with lower-level positions in government, and often in local government. This book will focus more on higher levels of employment within the public sector, and the selection of employees that may provide some political benefits, but who also may be of assistance in performing the tasks of governing.

The following implications derive from our definition of patronage:

1) The patron's discretion to appoint can result from legal dispositions as well as from informal practices. In virtually all political systems officeholders have discretion to appoint a number of politically or personally trusted personnel. In many countries, however, patronage appointments are regulated by informal rules that sidestep, bypass, distort, or simply violate established legal dispositions outright. As is often the case, and as Grindle puts it, "de facto practice trumps de jure theory" (2012, 145–46).

2) The definition considers patrons to be any political actor that has real power of appointment rather than just a legal one.

3) Patronage does not necessarily exclude merit as a criterion for personnel selection. Rather, it means that politicians have discretion to choose the criteria on which they base decisions to fill state positions rather than having it defined by competitive examinations. But neither is merit excluded from consideration when making patronage appointments.

4) The definition does not make assumptions about the relation between patronage and good governance. We conclude that patronage may have some benefits for governance, and that any normative assessment should consider

the costs and benefits of this practice in each particular political and cultural context.

MOTIVATIONS AND ROLES

Scholars have identified a broad set of motivations other than clientelism for making political appointments. Kopecký, Mair, and Spirova (2012) produced an important study of party patronage and party government in European democracies that was subsequently expanded to cover twenty-two countries from five regions (Kopecký et al. 2016). These studies consider two motivations of patrons: *Control* over the formulation and implementation of public policies, and *reward* of supporters for political services. They also classify the criteria for selecting personnel on professional, political, and personal grounds (Kopecký et al. 2016, 417). They found that the control of policymaking and implementation is the most common motivation for making political appointments, particularly in the low-patronage scope cases of Western Europe. By contrast, in countries with a large scope of patronage, appointments serve both as a control and as a reward function.

However, these studies fall short of providing a comprehensive analytical tool for comparative studies of patronage appointments. Arguably, their classification of modalities of patronage is too narrow to provide enough information about what the appointees actually *do* when given a position in the public sector. For instance, when appointments are made in order to control the policymaking process, how do appointees perform the task? By giving technical advice to their patrons in the executive, by controlling the public sector bureaucracy, or by using their political know-how to negotiate policy initiatives through the labyrinth of power (Campbell and Peters 1988, 84)? The three roles are significantly different and require different skills. When appointments are made to reward party militants, what role are these militants expected to perform? To engage in political activism on behalf of their patrons, to mediate between the ruling party and congress, or to oversee a bureaucracy often regarded as hostile to the ruling party? Again, different roles require different skills. And we should also be aware that patronage can be used to build both party and personal loyalty.

These lacunae take us back to the importance of identifying patronage roles by considering the roles played by appointees and the skills required to perform them. Variations in the number of political appointees notwithstanding, studies of patronage appointments in mature Western democracies tend to concentrate on the roles played by a narrow category of political advisors at the top of public administration. In contrast, in the more politicized

public administrations of developing nations, clientelism has been traditionally regarded as the main modality of patronage, and in many countries remains an important mechanism for gathering electoral support.

However, scholars have been examining motivations beyond electoral gains and roles other than political brokerage in the study of public administrations in emerging democracies. For example, studies have focused on political officeholders' need for technical advice as the motivation for the appointments of trusted technocrats in administrations with low technical capacity or highly politicized civil services (Teodoro and Pitcher 2017), particularly in processes of radical policy reform (Domínguez 2010; Silva 2009). Other studies have looked at political appointments at the upper levels of the public administration as instruments for coalition management (Bersch, Praça, and Taylor 2017; Garcia Lopez 2015). Still others have looked at appointees' roles as political operators responsible for securing political support for policy initiatives, or as agents of their principals for controlling the public sector bureaucracy and state resources in patterns not entirely dissimilar to those of Western democracies (Scherlis 2012).

Comparisons between countries and regions have centered on differences in scope, often under the assumption of the prevalence of clientelism in developing countries compared to developed nations, where patrons' motivations and the roles of appointees exhibit more nuanced characteristics. In light of the evidence, this assumption is difficult to sustain. By examining the nature of trust between patrons and appointees and the skills required to perform different roles, it becomes possible to elaborate a typology of patronage roles and test hypotheses about the relation between patronage roles, political officeholders, and political parties, and about the impact of different patronage roles on the workings of government, the political system, and public administration.

A TYPOLOGY OF PATRONAGE ROLES

Our typology captures a variety of roles that cuts across modalities of patronage both in high- and low-patronage administrations. We use two organizing dimensions: the nature of trust (partisan or nonpartisan), and the type of skills (professional or political) required from the appointees. When combined, the two dimensions permit classifying patronage roles across different modalities of patronage.

Trust is the essence of patronage. It cuts across other selection criteria and combines with them in different measures. Politicians will normally and naturally tend to appoint people they trust and, given the asymmetrical power re-

lation between patron and appointee, appointments usually terminate when there is a breakdown of trust. The significance of trust in patronage appointments is highlighted in a study of special advisors in the British government that states that "advisers serve as the eyes, ears and mouth of the politicians who appoints them" (LSE GV314 Group and Page 2012, 5). And, in some Latin American countries, political appointments are officially denominated "positions of special trust" (*cargos de particular confianza*).

Relations of trust can be based on partisan or on other forms of trust outside partisanship, which are here labeled "nonpartisan." In the latter we include personal trust between patrons and appointees, appointments made in order to co-opt potential enemies (opposition parties, bureaucrats, etc.), or because the appointee represents some powerful corporate or union interests that the patron seeks to bring on board. The predominance of one type of trust over the other gives information about who has appointment power and, indirectly, about the nature of the political system. While legal power of appointment almost always resides in an executive officeholder, in practice the appointer may just be rubber-stamping the appointment of a person trusted by the ruling party or by some other significant stakeholder, such as a business association or a trade union that has the real power of appointment. The predominance of partisan trust can be taken as an indicator of a strong party government or governmental coalition. Conversely, the predominance of personal trust may indicate a more personalistic political system, in which executive officeholders enjoy significant autonomous power relative to parties.

While different types of trust give indications about the nature of the political system, different skill sets indicate the different roles appointees perform within the administrative machinery and the political system. Some appointees are chosen for their professional expertise within a policy field. While a neutral, professionally qualified civil service is considered important for good governance, democratically elected politicians have a legitimate right to seek advice from politically sympathetic experts. They also can demand that public administration implement government policies in an efficient and timely way. In other cases, appointees are chosen for their capacity to operate politically, which does not mean that they lack technical expertise but that the skills sought by the patron are predominantly political. Political skills are typically required for brokerage between politicians and voters in clientelist patronage arrangements, but they are also required for other roles, even in low-patronage political systems. For instance, political skills are essential for media advisors, or to monitor the tenured bureaucracy, or to liaise between

Table I.1. Typology of patronage roles

		Type of skill	
		Professional	**Political**
Nature of trust	**Partisan**	**Party professionals**	**Apparatchiks**: Commissars, Party operators, Electoral brokers, Political activists
	Nonpartisan	**Programmatic technocrats**	**Political agents**: Minders, Fixers, Electoral agents

Source: Panizza, Peters, and Ramos Larraburu (2019)

executive officeholders and the legislature. We thus produce a typology of modalities of patronage practices combining the two dimensions (nature of trust and skillset), defining four main categories of patronage roles: party professionals, programmatic technocrats, political apparatchiks, and agents, plus a number of subcategories (see table I.1).

Party professionals are appointees that combine partisan trust and technoprofessional competence. These appointees tend to be found in the upper and middle levels of the public administration. Their main role is policy design and implementation. Campbell and Peters (1988, 24) describe party professionals as proactive participants in the policy process who combine a technical grasp of at least one policy sector with a consciously held partisan trust. As they put it, "[these] officials explicitly identify with the fortunes of a specific political party."

Programmatic Technocrats

Programmatic technocrats combine technical competence with nonpartisan trust. We borrow the term from Silva (2009) to describe independent experts who influence their political bosses through personal trust and specialized knowledge of a policy field. These appointees can, and in many cases do, sympathize with their patrons' political ideas, but their allegiance is to the officeholder and not the ruling party. In some cases they follow their patrons throughout their political careers in different positions in public administration. In others, despite being appointed by discretion, they become quasi-permanent members of the high public administration, rotating among

different positions of responsibility. In this capacity, they work for governments of different political affiliations, especially in more technocratic types of governments or when the career civil service lacks professional expertise. In some relatively rare instances the expertise of the individual itself is the foundation of trust, assuming that she or he will do the right thing technically.

Apparatchiks

Moving now to the dimension of political skills, in the quadrant that combines them with partisan trust we find the category of apparatchiks. With variations, this category appears in both emerging and consolidated democracies. The appointment of party loyalists to public sector jobs is a longstanding feature of Latin America's politicized public administrations (Philip 2003), in which it is often difficult to distinguish between the ruling party, the government, and the public administration. In European party systems, parties have come to compensate for loss of mass membership by becoming increasingly embedded in the state apparatus, drawing on state resources to maintain and reward their political cadres (Katz and Mair 2009).

Apparatchiks' roles in the public administration derive from their political capital as trusted by their party. Within this category there are several subtypes. In their study of European patronage, Kopecký, Mair, and Spirova (2012) found that the main role of political appointees was to control the public administration on behalf of the government. We call this subcategory *commissars.* We use the term *party operators* to refer to apparatchiks who use their political articulation skills to negotiate support for government policy within the party system, particularly within the ruling party or government coalition.[2] They are mainly found at the upper and middle levels of public administration. They understand the politics of the day, acting as intermediaries within the policymaking process by liaising with members of parliament, interest groups, and other stakeholders. Party operators are particularly relevant when the government lacks a parliamentary majority, and in presidential systems in which the president has low or moderate powers and is forced to negotiate with congress, as happens in the US system (Halligan 2003).

Also within the category of apparatchiks, but at lower levels of the bureaucracy, we find *electoral brokers*, whose role is to mediate the particularistic provision of public goods between governments and voters, typical of clientelism (Stokes et al. 2013). It is likely that this patronage role is more common in service delivery areas and at provincial and municipal levels. Finally, *political activists* at the lower levels of the public administration perform no distinct

role in the administration; their main role is to campaign for the ruling party or to act as claques for the party in political rallies. This subcategory has been identified in Paraguay by Schuster (2015) and in Argentina by Oliveros (2016).

Political Agents

In our fourth quadrant, combining nonpartisan trust and political skills, we identify political agents. The personal nature of trust gives agents little autonomy from their bosses, as they are not protected by party membership. At the higher levels of the public administration, the typical subrole is the so-called *minders*. The category fits the profile of a coterie of assistants who act as gatekeepers to their political bosses and become their "eyes, ears and mouth" (LSE GV314 Group and Page 2012, 5). In Mexico, this category of appointees has been traditionally called *camarillas* (cliques; Langston 1994), a term that gives a good idea of the nature of the relationship with their patrons. At the intermediate level we identify the category *fixers*. Similar to party operators, fixers liaise their patrons with the political system to mobilize support for their policy initiatives but, again, their loyalty is to their patron (normally executive officeholders) rather than to the ruling party. Finally, at the lowest levels of the public administration we identify the subcategory of *electoral agents*. They perform the same role as brokers but serve individual politicians as mobilizers and activists in electoral campaigns (Mares and Young 2016).

VARIATIONS IN PATRONAGE ROLES

The roles described above are not mutually exclusive. But despite the subtle differences among them, they are also real and have implications for both the comparative study of public administration and the study of the relations of patronage appointments and political systems. For each category of patronage roles the question of the scope of appointments and variations within different areas of the public administration remain beyond the scope of this book. We now apply our typology to varieties of patronage appointments in Latin America.

The various structural and agency factors influencing patronage appointments make it difficult to advance a general explanation of varieties of patronage. Our classification aims to identify the more frequent patronage roles that could be expected to be found in each cell, not to account for all possible patronage roles and every possible explanatory variable. A parsimonious way of understanding these modalities is to relate our typology to some key variables that have the potential to account for significant variation in patronage

roles. The contributors to this book explore three sets of factors that we assume have a significant explanatory power in accounting for differences in patronage roles across the region. These are: (1) party system institutionalization and strategies of party-building; (2) the strength and uses of presidential powers; and (3) the state's bureaucratic capacity.

Historically, processes of democratization and state building might have been considered equally important explanations (see Bresser-Pereira 2004). However, at the time of this study all the countries involved were democratic and we therefore would expect no variation. However, democratization may have increased the emphasis of responsiveness of government, and hence the desire to appoint more technically qualified personnel than might be available from the career civil service.

Party System Institutionalization and Strategies of Party Building

The study of the relations between parties and the state has been at the center of contemporary studies of patronage appointments. Parties shape the public sector and are shaped by the state. But parties exist not in isolation from each other but as part of systems with variable degrees of institutionalization. An institutionalized party system is a system in which a set of parties interact regularly in stable ways (Mainwaring 2018, 19). In an institutionalized party system there is considerable stability in who the main parties are and in how they behave (Mainwaring 2018, 68), even if some parties rise and others decline and the system adapts to new entrants (Mainwaring and Torcal 2006, 205). Ancillary characteristics of an institutionalized party system are strong roots in society, strong party organization, relatively low number of parties, and low ideological polarization (Mainwaring and Scully 1995). These features tend to require a strong party identity, and a large mass of party cadres—groups of individuals who have influence and prestige within political parties, generally due to the political or technical knowledge they possess—and activists that perform organizational tasks and link parties with the state and their mass constituencies.

Concerning Latin America, the region's return to democracy in the 1980s was assumed to lead to a process of progressive institutionalization of party systems. However, four decades into the third wave of democratization, parties remain weak and party systems are more fluid than they were a decade ago throughout most of the region (Levitsky, Loxton, and Van Dyck 2016). Political change in the region over the past decades includes processes of party system deinstitutionalization and reinstitutionalization, the enduring appeal of populism and political outsiders, the increasing presence of coali-

tion presidentialism, the emergence of new dominant parties, and the return of old ones.

Reviewing the status of party systems in the region, Levitsky, Loxton, and Van Dyck (2016, 1–2) note that "of the six party systems scored as 'institutionalised' in Mainwaring and Scully's (1995) work on party system institutionalisation, one (Venezuela) has collapsed fully, three (Argentina, Colombia, Costa Rica) have collapsed partially, and a fifth (Chile) has arguably been uprooted. Of the four party systems that Mainwaring and Scully (1995) classified as 'inchoate,' only Brazil has strengthened over the last two decades." Just three years after the publication of Levitsky, Loxton, Van Dyck, and Domínguez's book, the picture has further evolved, with the Brazilian party system further fragmenting in the aftermath of the "Car Wash" corruption scandal and the 2018 election, and the Argentine, Chilean, and Colombian systems experiencing further transformations.

Parties and party systems are not stable; they are moving parts. In developing democracies parties are often new and may undergo dramatic transformations (Lupo 2016). In order to have a more dynamic picture of the relations between parties and the public administration, we need to complement the study of party system institutionalization (PSI) with the analysis of strategies of party building (Levitsky, Loxton, Van Dyck, and Domínguez 2016). Fluidity may be the result of changing structural conditions that have weakened incentives for traditional strategies of party building and even provide resources and incentives for forms of electoral competition and the exercise of public office that do not require political parties.

Some of the more successful and enduring parties in Latin America were (or evolved into) clientelist-based machines (Levitsky, Loxton, Van Dyck, and Domínguez 2016). Clientelist machines are still important electoral resources throughout much of the region, particularly at local and provincial levels (Levitsky and Murillo 2005, Stokes 2005). But different developments, such as the shrinking of the state as a result of the neoliberal reforms of the 1990s and the need to appeal to broader constituencies, including a growing middle class, have made the building and maintenance of clientelist machines more difficult and costly and the electoral returns of clientelist exchanges more uncertain, particularly at a national level.

Political change has provided politicians with alternative strategies to building party machines in order to contest elections and exercise office. Some of these strategies are not new and they are not exclusive to Latin America, but the weakness of political parties and the volatility of politics in the region have made these developments more relevant than in the past. In the era of

political outsiders, it is possible to run for the presidency without long political careers and resource-intensive political machines. In some countries of the region new parties have bypassed traditional forms of party building by relying on business corporations to provide financial resources, electoral organizers, infrastructure, and distributional networks (Barndt 2017). Businessmen-turned-politicians can draw on their own resources to contract electoral activists and hire political operatives as substitutes for party organizations, as was the case in Peru with Cesar Acuña between 2002 and 2014 (Levitsky and Zavaleta 2016) and, more recently, in Uruguay's 2019 primary presidential election with Juan Sartori (Vázquez and Del Rio 2019).[3] The use of social media allows anti-status-quo politicians to appeal to voters without the need for strong party organizations, as was the case of the electoral campaign of Jair Bolsonaro in Brazil's 2018 presidential election.

While politicians may not need traditional party organizations to contest elections, they still require trusted personnel to govern. The hegemony of the neoliberal economic model in some countries of the region, such as Peru, Chile, and Colombia, has led to the consolidation of a neoliberal technocracy that provides advice and expertise to officeholders and swap positions between the public and private sectors and between different agencies in the state sector, as has been the case with the public sector technocracy in Peru (see chapter 6). In office, business—friendly presidents appoint private sector executives and programmatic technocrats from business-affiliated think tanks to run the high public administration, as has been the case of President Mauricio Macri's administration in Argentina (see chapter 1).

The ever-shifting patterns of party building and PSI in Latin America raise the question of whether PSI is still an appropriate conceptual lens through which to study political parties and their relation with modalities of patronage in the region. We believe it still is. Differences in PSI contribute to explaining differences in patronage practices between, say, the highly institutionalized party system of Uruguay and the almost totally deinstitutionalized party system of Peru, as shown in the chapters by Ramos Larraburu, Casa González, and Samudio and by Muñoz and Baraybar, respectively, in this volume.

Institutionalized parties tend to privilege partisan over personal trust. While institutionalized parties can, and often do, colonize the state, party organization exists autonomously from the state apparatus, precedes the party's access to government, and survives its demise. Parties with a strong organizational base may use patronage appointments to reward their cadres and control the public bureaucracy (Kopecký, Mair, and Spirova 2012). In-

stitutionalized parties will also have their own pool of party professionals to advise officeholders in the design and implementation of public policy. This locates patronage appointments in institutionalized party systems predominantly in the upper quadrants of our typology.

In contrast, in weakly institutionalized party systems, politicians mobilize support based on personalistic appeals and are often reluctant to invest in party structures that limit their power and autonomy. Yet, if elected, political officeholders will still need to appoint trusted personnel for policy design and implementation, particularly in countries with weak state capacities. Officeholders will also seek to control state resources for their political ends and gain political support for their policy initiatives. But the nature of trust between patrons and appointees will be personal rather than partisan, placing appointees in the lower quadrants of our typology.

The nature of trust and the roles of appointees, however, are not fixed in time but can change depending on the strategies and dynamics of party building. Politicians that gain office with weak or nonexistent party organizations can use patronage appointments for party building from within the state. They may initially appoint personnel based on relations of personal trust, ideological affinity, or policy expertise. They can also use appointments to reward individuals, business groups, think tanks, or social organizations that have contributed to their campaigns. But as they get entrenched in office, relations with their appointees become more institutional and trust more partisan. In this process, programmatic technocrats turn into party professionals and political agents into apparatchiks, as happened during the governments of president Cristina Fernández de Kirchner in Argentina (Panizza, Ramos Larraburu, and Scherlis 2018) and Rafael Correa in Ecuador (Sandoval, this volume).

PSI has also been associated with high levels of programmatic commitments. Programmatic or ideological linkages are important means by which voters become attached to parties and, hence, by which parties build a stable electoral base that promotes party continuity. However, clientelist attachments can produce the same institutional stability, as exemplified by several traditional parties in Latin America, such as the Partido Revolucionario Institucional (PRI) in Mexico and the Partido Colorado in Paraguay. Conversely, when party systems collapse, policy can change abruptly. Challenger parties and populist political outsiders can have strong ideological beliefs and programmatic preferences, as exemplified by some of the left-wing populist parties in Latin America that disrupted party systems in the first decade of this century (Philip and Panizza 2011). Thus, whether links with the elec-

torate are programmatic or clientelist depends on the nature of the political actors (both parties and office-seeking political leaders) rather than on the party system as a whole.

It is conceivable that in a given political system some parties' links with voters are predominantly programmatic while others tend to be clientelist. Moreover, in societies with high levels of economic inequalities and class fragmentation, such as those of Latin America, parties can segment their appeal, appealing to certain constituencies on programmatic grounds and to others on clientelist or personalistic ones (Luna 2016), which will require appointees to perform a variety of roles within the same administration. When links between parties and voters are programmatic, we expect patronage roles to concentrate predominantly in the left quadrants of our typology and when clientelist, in the right quadrants. Whether these roles are located predominantly in the upper or lower quadrants will, in turn, depend on the institutionalization of the relevant actors and on strategies of party building. In the case of institutionalized parties with programmatic links with the electorate, we expect to find more party professionals and political operators, as well as more programmatic technocrats and fixers for noninstitutionalized programmatic actors. When links are clientelist, we expect to find brokers and activists in institutionalized party systems and electoral agents in weakly institutionalized ones.

THE STRENGTH AND USES OF PRESIDENTIAL POWERS

We have emphasized so far the role of political parties and party systems as explanations for different models of patronage roles. But parties are not likely to be the sole or even the main holders of patronage powers. It is our assumption that the actors that control the public administration (executive officeholders) are key actors in the control of patronage appointments. Scholars of the presidency and presidential leadership have paid particular attention to the constitutional and partisan powers of the presidency. The president's control over the rest of the executive branch and the associated powers of patronage is a significant dimension of presidential powers (Shugart and Carey 1992). It is likely, for instance, that in presidentialist systems, such as those prevailing in Latin America, the politicoinstitutional powers of the presidency and the levels of party systems' institutionalization may be the main explanatory variable for who holds the power of appointment. Those powers may, however, be exercised differently depending on the relations between presidents and parties, the makeup of the political system, and the policy areas within which those appointments are made.

The "third wave" of presidential studies has used a principal-agent institutional model to analyze relationships between presidents and parties (Elgie 2005). In well-institutionalized party systems, party organizations are not subordinated to the political career of a leader; they have their own independent status and continuity (Huntington 1968, 12–24). Under these conditions, executive officeholders act mainly as agents for their parties (Elgie 2005, 117). Acting as principals, parties and party factions will constrain and condition the officeholders' power of appointment, as the president's discretional use of patronage appointments will be limited by the need to use patronage appointments to secure the support of the ruling party, party factions, or governmental coalition. Under these conditions we expect that patronage appointments will be concentrated in the upper quadrants of our typology.

Conversely, in cases of weak party systems or party systems collapse, in which parties are little more than vessels for the president's political interests, the principal-agent relation is reversed, with parties acting as agents for the president, who controls the party or uses the state apparatus to set up and maintain his or her own personalist party. Within this context, parties have little or no leverage over the president and no political agenda independent from that of the executive branch. Acting as principal, the president has a significant margin of autonomy for dictating policy and making discretionary appointments. As the weakness of party systems is normally combined with weak checks and balances, it also gives presidents the power to make discretional use of state resources, including patronage appointments, in order to advance their own political interests. Under these circumstances, presidents will enjoy considerable autonomy to appoint personally trusted personnel of no distinctive political affiliation in positions of responsibility at all levels of the public administration. In political systems in which the president is the principal and the ruling party the agent, personal trust will prevail, and we expect patronage appointments to be concentrated in the lower quadrants of our typology.

The two models of principal-agent relations between parties and presidents are ideal types that include a number of gradients and margins of variation related to strategies of party building. In the cases of institutionalized party systems, presidents and parties can also act with a significant degree of autonomy from each other. This would allow the president a relatively high margin of autonomy to appoint his or her own trusted personal advisors at the top of the public administration, a situation that is particularly likely to be common in the so-called centers of government—that is, the institution

or group of institutions that provide direct support to the president or prime minister. Last but not least, the principal-agent relation can change over time, as parties become institutionalized and deinstitutionalized and leaders face political challenges and problems of succession.

Parties and officeholders, however, are not the only relevant actors in the politics of patronage. Particularly when parties are weak and presidents are not actively seeking to build party machines, patronage may be exercised by other actors such as unions or business associations on whose support the government relies. This individualized form of patronage is built on trust as much as or more than the form based on parties, but trust is "nonpartisan" in the sense with which we use the term in our typology, signifying actors other than political parties.

Last but not least, patronage appointments are important tools for promoting governability. To this purpose, patronage appointments can be used as instruments for intraparty cohesion and for the management of governmental coalitions. While the use of patronage appointments to cement coalition governments is well established in parliamentary regimes, it is also an important tool of governability in presidential regimes. Scholars of presidentialism have argued that in presidential regimes there are fewer incentives for parties to join governmental coalitions than in parliamentary ones, which create important problems of governability, especially for presidents that do not enjoy a parliamentary majority (Linz 1990). However, the recent history of Latin America's presidential regimes in the 1990s and 2000s has shown that coalition presidentialism is much more common than predicted by critics of presidentialist regimes (Chasquetti 2008; Alemán and Tsebelis 2012) and that patronage appointments have played a significant role in intraparty management and in the setting up of presidential governing coalitions. For example, Ramos Larraburu, Casa González, and Samudio (2016) have shown how in Uruguay, the administrations of Presidents Tabaré Vázquez (2005–2010) and José Mujica (2010–2015) allocated ministerial posts in direct proportion to the share of the votes of the different factions of the ruling Frente Amplio coalition to secure parliamentary support from the ruling party. And in Brazil, which has a highly fragmented party system that requires a multiparty alliance to ensure a parliamentary majority, presidents have made wide use of the power of patronage appointments to secure the support of ideological diverse parties to form large governmental coalitions (Bersch, Praça, and Taylor 2017; Garcia Lopez 2015; Praça, Freitas, and Hoepers 2011; Praça, Odilla, and Guedes-Neto, this volume). When appointments are made for the purpose of building and sustaining governmental coalitions we expect that

appointments will be concentrated in the upper quadrants of our typology, as the parties that make up the governing coalitions will have real power of appointment.

THE STATE'S BUREAUCRATIC CAPACITY

The above explanations for the use of patronage focus on political factors that shape the opportunities to use patronage. The degree and type of patronage can also be influenced by the nature of the bureaucracy itself, and the legal frameworks within which the bureaucracies function. These factors may be important in creating the demand for patronage appointments, as well as in shaping the means through which they are made.

The general image of public bureaucracies in Latin America is not positive. The impressionistic evidence is to some extent supported by objective evidence. For example, the Quality of Governance survey on the professionalization of the public bureaucracy in Latin America shows that the scores for Latin American countries tend to be below the world average, and much lower than the scores of the Organisation for Economic Co-operation and Development countries (Teorell et al. 2022). Likewise, evidence from the World Bank shows that dealing with bureaucracy in Latin American countries tends to be more difficult than in many other countries (World Bank 2022). The legalistic nature of public bureaucracy in Latin America is one of the impediments to creating a more effective and efficient public bureaucracy (see Ramos Larraburu and Milanesi 2021). To some degree inherited from Spanish and French legalism in administration, the emphasis on law as opposed to management as preparation for the civil service and as the way to making organizations perform can inhibit performance and make the life of a public administrator in these countries frustrating.

Yet the overall picture of weak bureaucratic capabilities masks variations in time as well as between countries. In the first decade and a half of the current century a number of countries in the region undertook programs of civil service reform of different degrees of ambition and success (Cortázar Velarde, Lafuente, and Sanginés 2014). Summarizing the outcomes, a report by the Inter-American Development Bank (IADB) notes that there has been encouraging progress in terms of the modernization of the civil service in the region, even if it remains at a relatively low level (Cortázar Velarde and Lafuente 2014). And the same report notes that there were still considerable variations in the quality and professionalization of the civil service throughout the region (Iacoviello and Strazza 2014; Kopecký et al. 2016). In the cases of

weaker bureaucracies, patronage may be used to strengthen the state in the short run.

Regarding variations in the quality of the bureaucracy, we assume that a well-qualified body of civil servants, particularly at the top of the administrative hierarchy, as is the case in Brazil, could make it less necessary to use patronage appointments to draw technical expertise from technoprofessional outsiders. Concerning the legal framework that regulates appointments to the public sector, we suggest that the rigid and ultralegalistic nature of civil service regulations for appointments and promotions could have divergent influences in the scope of patronage appointments. In countries with a strong tradition of rule of law, such as Uruguay, this could limit the ability of political officeholders to make discretionary appointments beyond those authorized by law. Conversely, in other countries with weaker law enforcement and control mechanisms, it can be used politically to justify the use of informal mechanisms of appointment to avoid expensive and time-consuming procedures for appointment and promotion that tend to reward seniority over merit (see Ramos Larraburu, Casa González, and Samudio and Muñoz and Baraybar, this volume).

These three factors are all important in explaining the levels and types of patronage practices in the Latin American countries studied. There is a host of other possible explanations, but both the literature on patronage and our observations of the cases lead us to focus on these three. Some of these factors are general—for example, the legalistic tradition of administration across the region—while others such as levels of socioeconomic development may vary across the countries. The limitations of space and data prevent thorough discussions of all of these factors, but they can provide the basis for future studies of patronage.

RESEARCH DESIGN AND METHODOLOGY

Measuring patronage is not straightforward, as the exercise of patronage comprises a combination of formal and informal practices (Helmke and Levitsky 2006). An analysis of formal rules, such as laws, decrees, and constitutional dispositions that regulate public sector appointments can give a broad idea of the official number of discretional appointments. Such a study, however, risks missing a significant number of appointments that are regulated by informal rules that work around or simply violate legal dispositions. In an attempt to get a more comprehensive picture, scholars have attempted to estimate the numbers of discretional appointments by using proxies, such as increases in the number of public employees or in personnel spending. These

indicators, however, are influenced by factors beyond the power of actors to appoint discretionarily and may thus not truly reflect patronage practices (Kopecký Mair, and Spirova 2012; Scherlis 2013).

Informal practices are notoriously difficult to measure with accuracy and borderline cases often require judgment calls. An accepted qualitative method for measuring the impact of informal institutions on public life is to survey the perceptions of experts (Peabody et al. 1990). For example, this method was used by Evans and Rauch (1999) to identify features of Weberian bureaucracies in newly industrialized countries. Our research adopts and adapts the method of experts' survey originally developed by Kopecký, Scherlis, and Spirova (2008) and more recently employed by Meyer-Sahling and Veen (2012) and by Kopecký et al. (2016) for their comparative study of patronage in twenty-two countries from five world regions. In order to have a more rounded picture of patronage practices and in an attempt to minimize cognitive and political bias, we drew our interviewees from a wide range of political and professional fields comprising experts with a broad knowledge of the public administration and party systems of the countries in question and key informants chosen for their inside knowledge of four areas of the central public administration of each country selected for this research. Experts included scholars, specialized journalists, trade union leaders, parliamentarians, and public sector consultants. Key informants included active and retired career civil servants, trade unionists, current and former executive officeholders, and politically appointed public sector workers.

We chose four policy areas representative of the central public administration in all countries included in this book: the economy, social development, foreign relations, and agriculture. These areas were chosen on the expectation based on the literature on public bureaucracies that they represent different patterns of bureaucratic professionalization (Peters 1988): more professional in the economy and foreign affairs, more technical in agriculture, and more politicized in social development. The administrative hierarchy in each area was divided into "high" (top managerial level), "middle" (lower managerial and high administrative levels) and "low" (low administrative level, technical and service personnel) tiers, in accordance with each country's administrative scale of public sector positions.

We complemented the questionnaire and checked the interviewees' views against a number of primary and secondary sources. These included government documents, background interviews, Freedom of Information requests, press reports, international surveys, and academic studies. For changes in

the total number of public employees we relied on officially published figures. We surveyed legislation and other publicly available sources to estimate the number of discretional appointments authorized by law.

The countries included in this study were selected to include significant variation in two key variables: bureaucratic development and PSI. Regarding the former, Zuvanic and Iacoviello (2009) divide the countries of Latin America into three categories according to their levels of bureaucratic development, a category that combines merit with the functional capacity of the civil service. The top category includes "countries that have institutionalized civil services with practices that take into account the abilities and credentials of officials and structures that tend to maintain and develop a higher quality of work in the service" (160). Brazil and Chile are included in this category. In the second category, "bureaucracies are relatively well structured. . . . However, some of the guarantees of merit management tools that permit effective utilization of the competence of employees, groups, and institutions have not been consolidated" (161). Argentina, Mexico, and Uruguay fall into this category. The third category of countries "have bureaucracies with minimal development. . . . Here politicization is so strong that it hinders the development of a professional civil service" (161). Ecuador and Peru are classified at this level.

Concerning PSI, we drew on Mainwaring's (2018) scores for PSI for Latin America (1990–2015) and on the Varieties of Democracy 2019 index of PSI (V-Dem 2019). While the two indexes rank party systems slightly differently, they both register significant variations in PSI in the countries under study, with Chile, Uruguay, and Mexico as the countries with the most highly institutionalized party systems and Argentina, Ecuador, and Peru at the bottom.

Table I.2 shows the seven countries in this study arrayed according to the levels of PSI and bureaucratic development, using the criteria in the preceding paragraphs. The cases we have included cover five of the six possible combinations of values on those variables. It may be, however, that a Latin American country with a weak party system is unlikely to be able to develop a strong, professional public service. Newly formed and personalistic parties will tend to want to have the capacity to appoint their own officials in order to place their stamp on the government of the day.

The third independent variable did not figure heavily in the selection of the cases. Although there are indeed differences in the powers exercised by presidents in these countries, the differences are often subtle (Morgenstern, Polga-Hecimovish, and Shair-Rosenfield 2013). The several dimensions of presidential power—for example, relationships with congress, exposure to

Table 1.2. Countries' classification by party-system institutionalization and levels of bureaucratic development

		Party-system institutionalization	
		Low	**High**
Bureaucratic development	**High**	Brazil	Chile
	Medium	Argentina	Mexico Uruguay
	Low	Ecuador Peru	

Source: Authors' elaboration with data from V-Dem (2019) and Zuvanic and Iacoviello (2009)

impeachment, power over the courts—make clearly identifying more powerful *official* powers of the president difficult, and identifying the informal powers is even more difficult still.

THE COUNTRY STUDIES

This volume consists of seven chapters each focusing on one country, and a concluding chapter that brings together the findings and relates them to our framework for analysis. There was no clear theoretical or analytic variable that could be used to order the chapters, so we opted to arrange the chapters alphabetically, beginning with Argentina and concluding with Uruguay.

Argentina has for a long time had a weak civil service system and a great deal of patronage in government. Mercedes Llano shows, however, that the nature of patronage has changed and has become increasingly technocratic, given the weakening of the political party system. The Brazilian patronage system also has technocratic elements, and is linked to some extent to the formal personnel system of the country's federal public administration. Sérgio Praça, Fernanda Odilla, and João V. Guedes-Neto map the changes in patronage that have occurred from the end of President Luiz Inácio "Lula" Da Silva's government through to the end of President Dilma Rousseff's, and the role that changing politics during this period had on public personnel.

Chile has perhaps the most professionalized civil service system among these seven countries, but patronage appointments have been increasingly important. Emilio Moya Díaz and Victor Garrido demonstrate that the influence of parties over appointments in government has been declining, and the power of the president has been increasing. That pattern of presidential power in appointments is even clearer in Ecuador, because of the weak party

system and more personalist regimes of presidents. Cecilia Sandoval shows the strong role of presidential appointments, but also that the appointments being made often are individuals with necessary technical skills for making policy.

The upper levels of the public administration in Mexico have long been dominated by patronage appointments, even after significant attempts at administrative reform. Mauricio Dussauge-Laguna and Alberto Casas document the importance of patronage appointments and the links to party and individual office holders in Mexico. The system of public employment in Peru is somewhat similar to that of Ecuador, given the absence of an effective civil service system and a very weak party system. Paula Muñoz and Viviana Baraybar demonstrate the importance of the appointed officials for governance, and the strong role of personal trust in making the appointments. Finally, Uruguay has the most institutionalized party system among this group of countries. Conrado Ramos Larraburu, Mauro Casa González, and Tamara Samudio show that the party system is important in selecting individuals for important positions in government. The authors also show how the use of patronage appointments is linked to a civil service system that is becoming more institutionalized.

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This study of patronage in Latin America creates a typology of patronage. In so doing, we are pointing out that what may appear to be similar cases are in fact different, and have very different political dynamics. Further, we are pointing out that patronage may contribute to the quality of governance, perhaps especially when there is a weak civil service system. While we cannot test in any definitive manner for the links between patronage and variables such as institutionalization of the party system and the nature of the bureaucracy and presidency in these countries, the evidence coming from the country case studies does provide important insights. We identify patterns of patronage and governance that are important for understanding governance not only in Latin America but also in other parts of the world with extensive patronage systems.

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