

EXPERT SURVEY ON DEMOCRATIC ACCOUNTABILITY AND POLITICAL LINKAGES II
(DALP II)

Initial Findings for Brazil in Comparative Context

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Contents

Introduction	4
1 Democratic Accountability: Descriptive Elements and Theoretical Problematics	7
1.1 Mapping the Universe of Linkage Mechanisms: Descriptive Elements of Political Practices	7
1.2 Theoretical Purpose of Political Linkage Studies. An Incomplete Inventory of Empirical Research Questions	11
2 Investigating Democratic Accountability: The Research Strategy	13
3 Preliminary Findings: Global Patterns of Party Competition and Brazil in Comparative Context	16
3.1 Programmatic Linkage Effort	18
3.2 Personalistic Linkage Effort	24
3.3 Linkage through Descriptive Representation	25
3.4 Governing Record and Reputation for Capacity to Govern as Linkage Mechanism	27
3.5 Direct Targeted Exchange with Aspiration of Specific Conditionality: Clientelist Linkage .	28
3.6 Direct Targeted Exchange without Specific Conditionality: Pork and Constituency Service Linkage in Brazil	33
3.7 Mobilizing Party Identification as Linkage Strategy	34
3.8 How Linkages Hang Together: Linkage Profiles	35
4 Party Organization: Baseline for Coordinated Partisan Accountability	39
5 Conclusion — Analyzing Political Linkage Mechanisms in Competitive Party Systems: The Prospects	42
Appendix: Introductory Bibliographic Essay on Partisan Linkage Mechanisms	44

Glossary of Party Abbreviations

Brazil

Party Acronym	Party Name (Country's Language)	Party Name (English Translation)	DALP Version
MDB	Movimento Democrático Brasileiro	Democratic Movement Party	DALP I and II
PCdoB	Partido Comunista do Brasil	Communist Party of Brazil	DALP I only
PDT	Partido Democrático Trabalhista	Democratic Labour Party	DALP I and II
PFL	Partido da Frente Liberal	Liberal Front Party	DALP I only
PL	Partido Liberal	Partido Liberal	DALP I and II
PP	Progressistas	Progressive Party	DALP I and II
PPS	Partido Popular Socialista	Socialist People's Party	DALP I only
PSB	Partido Socialista Brasileiro	Brazilian Socialist Party	DALP I and II
PSC	Partido Social Cristão	Social Christian Party	DALP II only
PSD	Partido Social Democrático	Social Democratic Party	DALP II only
PSDB	Partido da Social Democracia Brasileira	Brazilian Social Democracy Party	DALP I and II
PSOL	Partido Socialismo e Liberdade	Socialism and Freedom Party	DALP II only
PT	Partido dos Trabalhadores	Workers' Party	DALP I and II
PTB	Partido Trabalhista Brasileiro	Brazilian Labour Party	DALP I only
REP	Republicanos	Republicans	DALP II only
UNIAO	União Brasil	Brazil Union	DALP II only

Note: This country dossier considers parties as the same when a name change occurred without a significant ideological shift between 2008 and 2022–24. Parties whose name changes were accompanied by ideological reorganizations are treated as distinct entities.

In Brazil, PMDB (Partido do Movimento Democrático Brasileiro) officially changed its name to MDB (Movimento Democrático Brasileiro) in 2017, as part of a rebranding effort without significant ideological shifts. PMDB and MDB are therefore treated as the same party here.

The DEM (Democratas), formerly known as PFL (Partido da Frente Liberal), merged with the PSL in 2021 to form a new party called União Brasil (UNIAO). PFL and UNIAO are treated as different parties.

Executive Summary for Brazil

This country dossier provides an overview of initial findings from the Democratic Accountability and Political Linkages II (DALP II) expert survey, conducted in 94 countries with multi-party elections, with 1,569 experts responding, generating an average response of almost 17 responses per country and between 10 and 24 responses in 80% of the countries. The survey asked experts to assess political parties' organization and their efforts to establish voter linkages through programmatic appeals, clientelism, personalistic leadership, descriptive representation, governing competence, pork-barrel politics, constituency service, and party identification. The first part of the dossier (Section 1, pp. 7-13) conceptualizes linkage mechanisms and itemizes the theoretical questions addressed with the data. The second part (Section 2, pp. 13-16) details the empirical strategy of investigation. The third part (Section 3, pp. 16-42) provides descriptive evidence on partisan linkage strategies in the dossier country in comparative perspective. For a quick overview focused exclusively on empirical results for the dossier country, readers may skip Section 1 and proceed directly to Section 2 and Section 3.

Key Findings for Brazil:

1. Programmatic linkage effort is generally limited across the party system, ranking in the lower third globally, with the notable exception of the Workers' Party and the Socialism and Freedom Party, which display high levels of policy distinctiveness, particularly on economic and non-economic issues respectively, contrasting sharply with the diffuse platforms of centrist actors.
2. Personalistic leadership appeals are, on average, lower than global standards but exhibit extreme polarization: specific parties led by dominant figures like Lula and Bolsonaro rely heavily on charismatic authority to mobilize support. In contrast, other major parties lack such personalistic traits and rely on alternative strategies.
3. Descriptive representation based on ethnicity remains marginal, yet religious linkages have become increasingly significant for right-wing parties mobilizing Evangelical voters. In contrast, center-left parties leverage regional and racial identities associated with the Northeast to connect with specific demographic groups.
4. Governing capacity and reputation for competence serve as robust linkage mechanisms for parties with substantial executive track records, such as the Workers' Party and the Brazilian Social Democracy Party, while legislative-centric parties are viewed as less capable of leading the government and function primarily as coalition partners.
5. Clientelistic exchange is pervasive and places the country in the top global tier, characterized by a mix where conservative parties utilize paid brokers for spot-market transactions while left-wing parties rely on long-term relational networks to maintain voter loyalty.
6. Pork-barrel politics and the provision of club goods are highly emphasized strategies utilized to secure electoral support, driven by an open-list proportional representation system that incentivizes politicians to deliver tangible local benefits and constituency services to distinguish themselves.
7. Mobilization of party identification is weak on aggregate but highly asymmetrical, featuring deep affective loyalties for the primary center-left party, in contrast to the volatile, recently formed attachments characteristic of the right-wing electorate, which lacks durable partisan bonding.
8. Party organizations display consistent high levels of territorial extensiveness across the spectrum, yet they differ significantly in centralization, with religious and right-wing parties exhibiting concentrated decision-making structures, unlike the more decentralized traditional centrist parties, which distribute power more broadly.

Conclusion: The empirical findings from the DALP II survey depict a Brazilian political landscape defined by asymmetrical linkage strategies and high systemic fragmentation. The party system is broadly bifurcated between a programmatic and socially rooted left, centered on the Workers' Party, and a right-wing bloc that relies heavily on clientelism, religious mobilization, and varying degrees of personalistic leadership. While the system as a whole exhibits robust organizational extensiveness and a heavy reliance on the distribution of club goods to secure votes, democratic accountability is constrained by the general weakness of broad partisan identification and the prevalence of transactional exchanges among conservative forces. This configuration highlights a persistent duality where a highly institutionalized programmatic core competes against a fluid, clientelistic, and increasingly religiously oriented periphery, with both sides leveraging distinct mechanisms to maintain electoral relevance. Ultimately, the data point to a stable equilibrium of diverse linkage profiles where governability appeals and extensive party networks coexist with deep disparities in how parties connect with their supporters.

Introduction

When political scientists in more than ninety countries around the world agreed to complete the DALP II survey on citizen-politician linkages, the project organizers at Duke and Bilkent University, Herbert Kitschelt and Kerem Yildirim, promised to circulate an overview of initial descriptive results for their own countries, placing this country-specific evidence within a comparative context. The present document makes good on this promise.

Over the coming months and years, the research team will probe more thoroughly into the data to explain how mechanisms of democratic accountability work in different polities and vary across parties and countries, what their consequences might be for the operation of such parties and polities, and ultimately how such linkage mechanisms are associated with the social and economic well-being of citizens who experience them. The data will be publicly released to the world-wide political science community of scholars and interested citizens 24 months after completion of the dataset.

In this overview, it will be impossible to provide an exhaustive accounting of all the empirical results for Brazil. The DALP II questionnaire is quite complex: depending on the country, experts and journalists responded to between 50 and 60 questions. Most of the questions asked respondents to score individual parties. So, in countries where experts rated 8, 9 or 10 parties, this put a heavy burden on survey takers: passing up to 600 judgments of party attributes in a matter of a couple of hours! This overview will obviously only report on a fraction of them and at aggregate levels, typically first displaying national averages of party attributes, with parties weighted by their electoral support levels in legislative elections held most closely ahead of the time window in which the DALP II survey data were collected. This bird's eye comparison will also make possible a visualization of differences and continuities between countries' party linkage features recorded in DALP I in 2007-9 and recently in DALP II in 2022-4. The dossier will then dig deeper and probe into party-level variance within your focal country and—on occasion—across countries.

Upfront, this country dossier will remind readers of the basic theoretical purpose that motivates the two DALP surveys and their empirical research strategy. The core question is to explore how parties allocate efforts to structure accountability relations in electoral democracies, i.e. engage in deliberate actions or “performances” they expect voters might employ as cues when choosing among multiple partisan competitors in electoral contests. DALP II thereby focuses on the **supply side of democratic accountability**: What do parties offer that voters might find attractive, or at least what to parties provide that may enable voters to sort parties into more or less attractive alternatives?

Ideally, of course, data on the supply side of linkage mechanisms should be matched with **corresponding data on the citizens' demand side**: What is it that voters expect political parties to deliver to attract their allegiance? And does the evidence from both demand and supply side enable investigations to identify where there are “matches” or “mis-matches”? Unfortunately, data pertaining to the demand side of the equation are available only selectively in comparative population surveys. To build a demand side dataset that would parallel the scope of attributes covered in the DALP surveys for the supply side in 90+ countries would be a monumental undertaking that still requires a team of academic entrepreneurs to step forward and tackle the acquisition of resources and build the organization to achieve that objective.

Normative democratic theory starts with a simple “programmatic” model of democratic accountability in competitive elections, the **responsible partisan government model**. Politicians pick up on voters' collective and club good preferences and promise to implement packages of such preferences (“programs”) they intent to convert into binding “policies”, if elected and in a position to shape authori-

tative policy-making. The first step of the empirical description of partisan linkages in Brazil, therefore, will be to check whether parties create the conditions for responsible partisan government: Do parties offer different visions of collective and club goods provision if in government that would attract electoral constituencies to some of them, but not others? As it turns out, the nature and intensity of partisan programmatic efforts vary a great deal across parties and entire democratic polities.

The next subject, therefore, is to investigate whether other “accountability mechanisms” may complement programmatic party policy appeals or even supplant them in cases where parties (and entire party systems) offer quite little programmatic structuring of the competition. The description of linkage mechanism follows what might be a simple sequence of voters’ and politicians’ interaction, when initially multi-party electoral competition comes about and becomes iterative over time. Linkage mechanisms may evolve when a polity installs electoral party competition for the first time and embarks on a process of incremental learning of different accountability mechanisms, a process that involve voters, politicians and political parties (as politicians’ vehicles to pool resources). The learning process starts with linkage mechanisms that require relatively few resources and organizational investments on the part of suppliers and little information processing on the part of voters. Subsequently, over time, politicians and voters may engage in a ladder of increasing efforts and cumulative information processing to solidify more robust linkage mechanisms:

- ▷ Relative few material resources, organization, and time may be required to build linkages based on the personality of party leaders or on descriptive traits of key party personalities and activist groups, such as ethno-cultural attributes (ethnicity, race, religion, language, region of residence). These features may resonate with voters even in founding elections before any party ever had a chance to perform in authoritative decisions as player in government executives.
- ▷ Next, the initial legislative and executive competence and performance of parties in early rounds of democracy may help voters update their appraisals of parties and influence their choices. Even based on rather limited information processing, it enables “economic voting” and other applications of “performance voting.”
- ▷ Further down the line, politicians and parties may engage in more demanding organizational and financial efforts and voters may accumulate more information about the sincerity of parties to construct “clientelist” linkages, involving the provision of localized benefits (or prevention of losses and punishments), targeting individuals or small groups in the expectation of affecting voters’ party choices in ways to be defined more precisely in the relevant section of this dossier.
- ▷ There are two other linkages based on targeted benefits that do not involve expected reciprocity of exchange and should be considered, the distribution of localized club goods (“pork”) and individualized services of legislators to constituents without any selection mechanism or targeting that would imply clientelist intent (“constituency service”).
- ▷ The linkage mechanism that requires plentiful organizational, personnel, financial and/or informational investments, over an extended period of time to build “brand recognition,” then finally is programmatism. As an additional long-term investment, parties may also actively build and cultivate an affective “culture” of support configured around partisan identification. But we cover programmatic party competition first, as it is the “master template” of democratic theory, and the insufficiency of using programmatism to characterize party competition in many countries—and for many individual parties—prompts us to then investigate other mechanisms.

Altogether, then, the ladder of political learning of party competition by actors both on the supply and the demand side of democratic accountability linkages involves efforts to focus on (1) the personality of politicians, (2) descriptive group representation, (3) performance (“economic”) voting, (4) clientelism, (5) programmatism and (6) affective partisan identification building. Add to that two further mechanisms in the gray zone between clientelism and programmatism, the provision of local public goods (“pork”) as well as legislative constituency services.

The point is that existing research on accountability mechanisms and political representation has typically focused on a singular “linkage performance” at a time: either programmatism or clientelism (but typically not both) or personality appeal of political candidates and their parties. In practice, however, politicians are compelled to consider all of them, at a minimum by omission or non-decision-making, and sample from the whole toolkit of linkage mechanisms taken together to build a “party linkage profile” under conditions of resource constraint (time, money). So, by incorporating detailed measures of both programmatism and clientelism, and by supplementing them with more round-about measures of linkages through politicians’ personality, descriptive representation, office performance, constituency service, pork and affective partisan identification, the DALP survey will make possible to study the supply side of linkage mechanisms in interaction with one another for the first time.

Before delving into DALP II data and cases, it is prudent to remind scholars that social and political affairs are difficult to measure, especially in a globally comparative framework that requires heroic simplifications. **By definition, the data collected and displayed contain substantial measurement error.** The presence of measurement error should caution readers against jumping to rash conclusions about the nature of linkage mechanisms in democracies based on DALP scores for any individual party’s or even entire country’s democratic linkage practices. It is important, therefore, to study patterns of relations among many observations. Moreover, DALP expert surveys, and data patterns established through them, should be triangulated with information based on other data generation techniques tapping into the same theoretical issues, but that do not involve subjective expert judgments, whether these may be population surveys, statistical information about the observable behavior of political actors (such as turnout data, roll-call votes, budget allocations, etc.) or localized field or natural experiments. While some of these methods generate data that probe deeper than expert surveys, none of them approximates the scope of reach — 94 countries, over 600 parties — achieved in DALP II.

In this country dossier, **only mean values for attributes of political parties and entire party systems**, with the latter based on the average of the parties’ scores **weighted by each party’s electoral support level**, are reported. But these survey scores involve more or less uncertainty about divergence from the true unobserved score. Since each country survey includes on average 16 experts offering individual judgments of each variable, a first approximation of uncertainty about a party’s attribute derives from the **standard deviations of those expert judgments when asked about the same party attribute**. The variance of expert judgments may be due to both **“objective” variability and fuzziness of a party attribute** that is scored by political experts as well as to **experts’ subjectively varying levels of knowledge and informational frames, yielding differential item functioning**. At the end of each thematic module of survey questions, therefore, DALP II asks experts to self-assess their own confidence in the judgments they provide in order to capture subjective uncertainty. This dossier does not report on these various measures of judgment uncertainty, but this information can be retrieved easily from the data survey and obviously will play an important role in more thorough analysis of linkage patterns with DALP II data in the future.

If readers of these country dossiers have comments about the findings displayed, the research team would be eager to learn about them. In this case, please send an e-mail to the Principal Investigators.

Readers' reactions will be instructive to guide the future investigations with the data. If you send the research team a reaction file, let us thank you in advance for your effort.

1 Democratic Accountability: Descriptive Elements and Theoretical Problematics

The normative background motivation of this research project is a key concern of democratic theory: How should democracy work so that binding authoritative decisions reflect (in ways to be specified) citizens' preferences and follow changes in such preferences? How should citizen demands be recognized in the political decision-making process and allocation of benefits? In settings of representative democracies with electoral party competition, what should political actors—candidates for electoral office, typically banding together and pooling resources in political parties—do and communicate to voters in order to achieve their support and allegiance?

The normative motivation inspires a positive theoretical and empirical question: How do politicians act on citizens' demands, in existing polities with multi-party competition, whether they are full democracies, electoral democracies, or even hybrid electoral autocracies with several parties competing on a slanted playing field? At a minimum, democracy is a system of rules that specifies how candidates or parties compete for voter support. The rules specify intermittent elections so that voters can reassess the office incumbents and replace some or all of them with other contenders. The anticipation of parties and their politicians being held **accountable** in upcoming elections, i.e., voted up or down when seeking a renewal of their mandates to represent an electoral constituency, may make politicians **responsive** to citizens' demands during a running electoral term. Parties' and politicians' demeanor in electoral campaigns may then indicate what politicians believe to make them most valuable to voters. This also applies to opposition parties. They will work to make credible commitments to satisfy voters' demands that they believe are unmet by incumbents.

Where politicians deliver what voters expect, they establish a “linkage” between electoral constituencies and political agents. Linkages involve both supply and demand side activism. On one hand, voters demand certain linkage performances from politicians, and these may involve politicians to sport the same socio-demographic and ethnocultural traits as their constituencies (“descriptive” representation), project an impressive personal demeanor (“charismatic” appeal), deliver collective and club goods (“programmatic” policies), or deliver targeted benefits—or abstain from threats to withhold them—to selective individual and small groups of voters (“clientelist” exchange) or any of the other linkage performances listed above. But on the other hand, politicians may actively establish such linkages, venturing to influence and shape the nature of the demands that voters make either directly or through intermediaries in their party organizations, interest groups and diverse communication media. Nevertheless, where the symbols, goods and services that politicians deliver clearly motivate voters' acceptance of a politician or party, we can speak of a “linkage mechanism:” voters and politicians “link up” through a match between (voter) demand and politicians' (parties') supply, regardless of the precise causal process that creates the specific profile of that supply and demand.

1.1 Mapping the Universe of Linkage Mechanisms: Descriptive Elements of Political Practices

What are the practices that democratic politicians expect to secure voters' approval? What is it that parties expect voters to “take into account” when discriminating among competitors? We will

attempt to distinguish between different types of activities politicians may undertake to the critical mass of electoral support required for election to public office¹.

Programmatic Linkage

In democratic theory, the “**responsible partisan government**” model reflects the conventional understanding of what politicians offer to voters and how voters discriminate among the merits of rival candidates and parties: Citizens have diverse preferences over “policies,” understood as authoritative government decisions to produce public or club goods and services as well as regulations of citizens’ conduct in markets, politics, and socio-cultural contexts. Citizens opt for the party and/or coalition of parties that offers the best prospect of implementing policies ‘closest’ to their own personal policy preferences. When citizens disagree on the ideal policy for dealing with a given social or economic issue, parties may engage in “positional competition” by offering differing policies to different electoral constituencies. Office-seeking politicians, parties, and party coalitions will try to tailor their policy commitments to voters’ preference distributions and rivals’ policy commitments such as to maximize their chances of winning.

While **programmatic partisan competition** is widely mentioned and discussed in the party politics literature, there has not been a serious effort to operationalize it in detail for comparative analysis across parties and party systems: Which parties are investing more in “programmatic” linkages than other linkage mechanisms? Which party systems display a higher “programmatic” effort of the whole set of political party competition than others? To our knowledge, DALP I for the first time delivered such measures at the party and the party system level, and now in DALP II they have been supplemented by improved and more precise measures explained and empirically documented in the third section.

Clientelist Linkage

The big alternative — or complement? — to programmatic linkages in party competition discussed in the political science literature has always been **clientelist linkage**. It may be characterized by a number of attributes: Identification of recipients? Positive or negative voter inducements? Inducements to vote for a particular party or to abstain? Types of voter inducements? Inter-temporal durability of inducements? Conditionality, monitoring, sanctioning, and enforcement of exchanges? All of these attributes can be explored with the DALP II survey.

The most stripped-down conventional ideal type of political clientelism is a simple spot-market exchange with contract enforcement: Electoral candidates solicit votes from prospective individual voters—or such voters offer to provide—votes in competitive elections in exchange for immediate tangible benefits accruing to those voters, but only in case the vote has actually been delivered (conditionality). And that completion of the exchange has been monitored by the candidate and—in case of observed voter defection—led the candidate to withhold the benefit or impose a penalty/cost on the voter. This ideal type was approximated only in rare occasions, typically with electoral arrangements with public voting, i.e., no individual secrecy of the vote.

In contemporary practice, however, basic to clientelist linkage is the **targeting of linkage effort onto individuals or small groups of electoral constituencies** (families and family networks, geographically small neighborhoods, etc.), i.e. parties’ delivery of authoritative consequences (benefits,

¹Whether or not voters in each polity actually “recognize” and “accept” these offers, and thus complete the linkage mechanism, is beyond the scope of the study. In order to achieve this more complete picture, our study must be complemented by extensive survey research to establish how voters perceive and endorse the “performances” of parties and politicians to establish linkages.

coercion) that approximate “private” or small-scale club-goods, not large-scale club goods or collective goods affecting large segments of the voting public or everyone. But there are many different kinds of clientelistic linkage efforts not conforming to the “spot-market” exchange model:

- ▷ Parties may deliver a benefit or forbearance of inflicting a cost on voter recipients. Coercive and remunerative clientelism is often difficult to distinguish and intertwined, often two sides of the same coin: Getting the reward of a municipal public sector job in exchange of supporting a party and its candidate is certainly a benefit, but being excluded from—or deprived of—such benefit is a penalty and the voter may perceive it as political coercion.
- ▷ Clientelism is often not at all spot-market “vote buying,” the distorting shortcut it is often equated with, but involves a stream of enduring relational exchanges between partisan patrons and their followers, e.g. prominently through the appointment of patronage public sector jobs or through government contracts with favored companies and associations. There are many benefits and costs that can come into play in targeted clientelist exchange, some short term (gifts, cash, regulatory decisions), some long-term (social benefits such as disability or early retirement pensions, public sector jobs, government procurement contracts. Etc.), some directed to individuals, and others to small groups.
- ▷ Clientelistic exchange does involve implicit conditionality, such that politicians expect electoral support in exchange for providing targeted benefits, and voters demand specific, tailored compensation in exchange for delivering their vote. But all participating actors understand that monitoring, enforcement and sanctioning of such exchanges, in case of defection, are rarely practical and are excessively costly. Hence, clientelism is a “leaking bucket” with copious defection by patrons and clients. Nevertheless, especially intertemporally relational exchange—public sector jobs, social benefits (disability payments, subsidized apartment rents, educational scholarships, etc.), or procurement contracts to firms—may be self-enforcing: Recipients have a strong intrinsic interest in seeing their benefactors (re-)elected or their partisan based benefits may be revoked. Furthermore, a great deal of conditionality may be based on social network communication, solidarity, and reciprocity mechanisms not considered in the stripped-down ideal type of clientelism.

Linkages that require little organizational and informational investment by politicians and parties

As indicated before, there are a number of other linkage mechanisms that have been studied less systematically than programmatism and clientelism in democratic politics. These linkages are the ones that can be **activated with little organizational and informational costs to politician and voters and can thereby play a role even in emerging democracies, when politicians had not yet had the time to invest in the organizational and informational implements to produce credible programmatic and clientelist linkage efforts and party brands registered by voters and shaping their partisan choices.**

At the inception of democracy, or in regime crises, the electoral advantage may go to personalities with publicly demonstrated **extraordinary qualities of political leadership (“charisma”)**. They may have been instrumental in bringing about or protecting electoral party competition: Charisma is often based on a publicly visible ordeal of suffering sustained by a politician on behalf of supporting an electoral constituency. Consider jail time under a preceding dictatorship and release from prison as an event of political celebration that instantly propels a personality into the stratosphere of name recognition and establishing them as a candidate for high electoral office—example Nelson Mandela or

Lech Wałęsa. Or consider military service, a general leading an army of insurrectionists against an authoritarian regime or a foreign colonial power—example George Washington. But charisma may also result from a variety of other personal qualities, for example effectiveness in the sphere of old public and new social media and thereby not be limited to conditions of early party system formation.

Politicians and parties may also sport **electoral candidates’ descriptive attributes of socio-economic class or socio-cultural group membership** (gender, ethnicity, race, language, religion, residence) to resonate with voters. These attributes may complement programmatic or clientelistic appeals, but also serve as stand-alone manifestations without involving substantive programmatic content or targeted exchange mechanisms. Pre-existing networks and associational infrastructure of groups crystallized around a descriptive group attribute may strengthen the electoral appeal of party candidates featuring corresponding attributes. Nevertheless, in many instances descriptive representation may elicit support even if political candidates with plausibly popular descriptive features lack party organization and the pedigree of party brand recognition based on a long historical party record and personal involvement in politics. Once again, descriptive markers may be particularly useful to parties in the process of initial formation, but they may sustain their relevance throughout their electoral careers.

Once parties have begun to leave a track record of legislative activities and government executive participation, some voters develop a “tally” of parties’ contributions to policy and/or attribute observed economic and social outcomes (inflation, unemployment, growth, social unrest) to the governing parties’ executive incumbency (“economic voting”), whether with justification or not. Incumbent government parties may induce political business cycles, attempting to improve economic or social outcomes before elections that have “valence” features, e.g., are endorsed by large majorities of voters (e.g. boosting voters’ after-tax income, clamping down on crime or illegal immigration) in order to resonate positively with voters. Over time, parties may accumulate a brand image for bringing about certain outcomes, e.g. fighting inflation or boosting employment. The DALP II survey attempts to capture experts’ assessment of parties’ efforts to boost their public performance perception on valence issues as emphasis on “their general competence to govern and bring about or maintain economic, social and political stability” (question E5).

Finally, there is **party identification**. It is usually understood as something that evolves on the demand side among voters through political socialization and social networks reinforcing allegiance to a political party. But one can also think of **supply-side strategies of political parties to enhance partisan identification through symbolic cultural and social manifestations, festivities, features of party artifacts (flags, clothing, commemorative monuments) or celebrations of party history**, thereby creating an affective cohesion of a core partisan electorate. It makes people receptive to adapting their programmatic policy preferences to those of the party leadership, when they latter find it opportune to change course, rather than choosing a different party better aligned with their pre-existing preferences. Party identification may be reinforced by all the other linkage mechanisms. Without having empirical test results, one might hypothesize that parties scoring higher on a larger number of other political linkage dimensions may also score higher on promoting voters’ party identification.

Political parties rely on more or less—and on different kinds of—**internal party organization** coordinating party activists with different roles to deploy political linkage strategies. DALP II includes expert scores about a number of organizational attributes in modules A and C of the survey. One dimension concerns the **organizational extensiveness of party organizations** in the sense of geographical coverage of a party’s physical presence across a fraction or up to the entirety of a country (“party nationalization”) and—relatedly but not identical—the scope of membership and activism the

party is mobilizing relative to the size of its electorate and that of the country. A second dimension concerns **the degree of coordination and centralization parties devise in their organizational structures** to solve challenges of collective political choice and gain collective unified strategic capacity. A third dimension—important for clientelist parties—concerns the **organizational forms used to mobilize and disburse goods, services or penalties targeted to voters parties wish to reach as their electoral constituencies**. The clientelism literature investigates this under the heading of “brokerage” linking electoral politicians to their voters through a chain of intermediaries organizing the targeted transactions.

Parties’ linkage profiles—i.e., the ensemble of the various linkage mechanisms they emphasize, as mapped by DALP II expert assessments—may be associated with different organizational party structures. Abstention from causal language is here intended: It may be fiendishly difficult to determine whether it is more the case that parties’ linkage profiles shape their organizational structures or that organizational structures shape their linkage efforts. Organization and linkage profiles may be involved in a continuous process of mutual equilibration. Given the current state of the literature, it may already be a step forward just to establish some basic facts about robust correlations.

1.2 Theoretical Purpose of Political Linkage Studies. An Incomplete Inventory of Empirical Research Questions

This country dossier will not address theoretical questions that can be investigated with the DALP II dataset, but nevertheless would like to itemize a subset of potential avenues of research that have, in fact, played a more or less important role in the existing literature on the subject. Some of these subjects aggregate DALP II data to the level of national party systems, others focus on the level of individual parties. And there is, of course, the possibility of inter-level interaction such that features that vary across parties play out differently, depending on the systemic context they occur.

How do linkage mechanisms “hang together”?

One classical question of linkage investigations is how different types of linkages relate to one another. There is the perennial question of **trade-offs between clientelist and programmatic linkage strategies**. Is it a zero-sum game or are there circumstances in which parties can bundle both productively? The literature has focused mostly on the trade-off. But doubts about the tightness of this trade-off between linkage modes have been voiced for some time. And cannot parties engage in linkage diversification that make heavy investments in wooing voters both by clientelistic and programmatic ties? Or could parties at least target different voter constituencies with different linkage mechanisms?

The DALP-II survey makes it possible to shift the debate again. Since a multiplicity of linkages can be measured, it is not just complementarity or competition between programmatic and clientelist linkages that can be explored, but the clusters of configurations that emerge across the whole gamut of linkage combinations that are conceivable. Parties choose complex “linkage profiles” explicitly or implicitly, assigning weights to the whole range of linkage considerations (program, clientelism, descriptive representation, leadership personality, governance competence, party identification, pork, constituency service). But not all conceivable combinations will appear. It is important to identify prominent configurations the causes and consequences of which need to be determined.

What brings about and sustains different linkage profiles?

The most widespread **developmentalist argument** about the origins of linkage patterns asserts that clientelism is for poor countries and poor people, while programmatism is for affluent and educated countries and voter strata. There are a variety of micro-mechanisms that undergird this logic (income/wealth/education dependent discount rates and time horizons, for example). But how tight (and linear¹) is the relationship between economic development and the trade-off between the two prominent clientelist or programmatic linkage strategies? Many linkage analysts have ventured to challenge it or posit that it applies only conditionally.

Maybe it is not the level of economic development per se, but the degree to which scarce resources in a polity are allocated by non-market mechanisms that shapes linkage profiles. Maybe “**developmental states**” where **political elites dominate the finance sector, regulate business competition and select industrial sectors for favorable treatment** display partisan linkage profiles where leading parties put more emphasis on clientelism, pork and party identification than in more market-governed political-economic settings? Likewise, is the relative magnitude of public and non-profit sector employment in municipal and national civil service bureaucracies associated with partisan linkage profiles?

Another influential argument maintains that **clientelism will prevail over programmatic partisan appeals in the early years of competitive democracy** when politicians do not yet have accumulated a track record of policy reputations and have not yet made an investment in a party infrastructure that promises continuity and allows politicians to develop a reputation for credibility, resulting in brand recognition. But as we posited above, except in the case of parties that may descend from pre-existing authoritarian ruling parties, in new democracies young political parties may have a hard time establishing clientelist modes of resource extraction and targeted deployment to prospective voters, as these undertakings require pretty elaborate organizational routines in most instances. Based on DALP I and II, we can track whether democratic “aging” begins to displace clientelist politics.

A further common argument—plausibly buttressed by case studies ranging from Brazil via Italy to Taiwan—asserts that **electoral institutions that personalize politics and create competition among candidates of the same party**—such as open-list proportional representation electoral laws in legislative elections or direct presidential elections, particularly with a majority two-round run-off format—promote the direct clientelist exchange between political candidates and targeted voters, while closed-list systems of proportional representation and parliamentary governance favor programmatic party systems. Personalizing electoral institutions may also be identified as promoting the importance of charismatic political leaders. Once again, the jury is out on the institutional hypotheses. It remains to be seen how valid they are, once large-scale comparison among many countries with different party systems becomes possible with DALP I and II data.

Next, there are ongoing debates about the **relationship between parties’ linkage strategies and ethnocultural pluralism in a polity**. Are polities—and parties catering to specific ethnocultural segments—exceptionally clientelist in plural societies, particularly when ethnic networks might facilitate the distribution of political benefits to targeted individuals and small groups? Or does the degree of clientelistic politics in individual parties and whole polities depend on between-group income and political power differentials?

Finally, how about the **intensity of electoral competition**? Do less competitive systems, where voters are relatively inert and small changes in electoral support do little to shift power balances between parties over government formation and policy control, promote dominant parties to rely more or less on targeted clientelist exchange, pork, descriptive representation and party identification, whereas

intensely competitive situations prime programmatic politics to win uncommitted voters and may also deploy leadership charisma and valence competition? There are debates in the literature, with findings drawing on individual countries and subnational settings pointing in opposite directions, so that a broad cross-national comparative analysis can make a meaningful contribution here.

What are the political-economic and political-cultural consequences of linkage profiles?

Preciously few studies have associated democratic linkage profiles with political-economic or other policy outcomes. A common presumption is that countries in which the leading parties put greater weight on clientelist linkages produce fewer collective goods and large-scale club goods, thereby permitting or actively producing more inequality of income, wealth, and qualitative life chances as well as lower economic growth. But until now, there is preciously weak evidence to back any of these claims. The DALP II survey can help filling that gap.

Likewise, inasmuch as personalistic linkages loom large in party competition, charismatic politicians—typically with small, but centralized party machines—may produce fewer collective goods and beneficial economic outcomes. This is also a consequence sometimes attributed to democratic politics revolving around descriptive political representation, particularly of an ethnocultural type: Are rent-seeking groups availing themselves of resources they will not deploy in a fashion that magnifies and spreads the benefits across societies? Once again, at least with regard to clientelist electoral channels, there is little evidence that would allow scholars to reach a decisive conclusion.

Types of linkage profiles promoted by parties and entire party systems may also interact with citizens' satisfaction with politicians, political parties, and democracy as a system of authoritative decision making. The typical presumption is that programmatic party competition will command the highest levels of satisfaction, but that may be contingent upon many circumstances. Once again, there is little research deeply probing into this question.

The theoretical issues raised in this section will not be empirically addressed in this country dossier. But they form the horizon within which the data reported here are meaningful and relevant.

2 Investigating Democratic Accountability: The Research Strategy

The motivation for the original survey was that an encompassing coverage of clientelism as a form of political linkage in democracies was still missing. While V-Dem has since that time provided a handful of basic indicators, a more fine-grained coverage—comparable to what the Chapel Hill Expert Survey does for parties' policy positions—is still missing for other linkages and especially clientelism. DALP II, in turn, was prompted by the desirability to generate a second data point after a long interlude of 14 years, with the objective to assess the changes that have taken place in the intervening period.

For DALP II, three extensions of the survey had become desirable. First, while multiple indicator of programmatism (module D) and clientelism (module B) are still the core of the survey, module E of the survey now not only includes at least one score each on linkage mechanisms concerning how parties project leadership personality ("charisma"), party identification and capacity to govern as additional linkage mechanisms, but also their deployment of ethnocultural descriptive representation, pork provision and constituency service. It thereby becomes possible to capture a more inclusive profile of linkage mechanisms empirically.

Second, building on a massive number of detailed empirical studies about the mechanisms of clientelist exchange under contemporary institutional conditions of vote secrecy and often Australian ballot, a new module C of DALP II asks experts to score the organizational channels of clientelist exchange through “broker” services. This includes questions about the insertion of brokers into parties and clientelist exchanges, their task structures and their career trajectories. Module A of the survey is still devoted to general organizational questions (extensiveness and centralization of parties), their bonds to civic associations and questions of party finance.

Third, DALP II enlarges the scope and diversity of policy issue positions that might become controversial between parties by including global warming policies, urban-rural relations, corruption and subnational decentralization. For each issue, experts now supply both scores of parties’ issue positions as well as issue salience. DALP II also features two items about the prominence of populist rhetoric in parties’ political appeals. As in DALP I, additional country-specific issues were added in order to ensure that summary estimates of programmatism of party competition would not be biased by ignoring idiosyncratic national or regional issues. This included, for example, European integration issues only in the European countries, international alignments (e.g. with Russia, the U.S. or China), regional integration, coping with organized crime, constitutional reform, civil liberties, or specific economic questions (concerning control of raw materials production, infrastructure, etc.), to name just a few.

In each national survey, political parties have been included that have some impact on the distribution of political power by (1) having coalition (bargaining) potential to make or break majorities in legislatures or executives that make binding decisions and/or (2) having “spoiler” potential to diminish the coalition bargaining power of the first set of parties. There is no hard-and-fast simple rule to determine which parties must be included in a national survey, and the general rule was to err on the inclusive side, provided that would keep the total number of parties scored by experts to fewer than—or certain not much more than—10 parties per country. As a rule of thumb, with 10 parties and a total of 50-60 subjects in five modules to be scored, experts were asked to provide up to 500 individual judgments in completing this survey. Only in a few instances with extremely fragmented and diversified party systems, DALP II imposed on experts the ordeal to score a larger number of parties (e.g., Brazil, Denmark, India, Netherlands). The average number of parties across the DALP II countries was 6.6 and the median was 6.5.

Consistent with DALP I, DALP II aspired to include all polities around the globe that met at least the following two criteria: (1) more than 2 million inhabitants; (2) civil and political rights of no worse than Freedom House scores of 4.0 over a run of years preceding the data collection. In DALP II, we added as a reference point the inclusion of all countries that had a Varieties of Democracy Project (V-Dem) liberal democracy index score equal to or greater than 0.30 on a 1.0-point scale.

But both DALP surveys also covered a few countries slightly smaller than two million inhabitants, such as the Baltic countries or Moldova. Both surveys also feature prominent countries with definitely unfree and/or unfair multi-party elections. In DALP I, this applied to Angola, Egypt, Morocco, Russia and Venezuela. Three of these abolished any semblance of multiparty competition in recent years so only Angola and Morocco are left in DALP II. Also missing from DALP II are Mali, Nicaragua and Niger, all countries without even a pretense of free and fair elections. But DALP II added some new countries not covered in DALP I, namely Bosnia & Hercegovina, Kosovo, Lesotho, Liberia, Montenegro, Singapore, Sri Lanka, Tunisia (pre-2021 scoring) and Zimbabwe. So, the country overlap between DALP I and DALP II is not perfect. Ultimately, the coverage went up from 90 countries in DALP I to 94 countries in DALP II.

In many countries, DALP II formally included academic “country anchors” who advised the core investigative team on (1) which parties to include, (2) how to adapt the survey (language of survey administration? Stylistic modifications?) and (3) what distinctive national issues to include. As experts, academics with advanced political science degrees teaching and conducting research on the electoral and partisan politics of their countries, whether residing inside that country or elsewhere, whether in universities or independent research/survey institutes/firms, constituted the core target group of survey participants. Especially in countries with small academic establishments, qualification criteria were relaxed to include PhD candidates (with local or international university residence), or academics and professionals in neighboring disciplines (political sociology, contemporary history, public law, etc.).

Rates of return on survey invitations of experts varied dramatically from lows of around 10% (France!) to highs of 90% (Jamaica!), depending on a variety of factors. But almost all countries are covered by between 12 and 20 completed surveys with a median of 16. The lowest returns with only 7 respondents were recorded in countries with small academic communities and/or other challenges (Lebanon, Lesotho, New Zealand). At the other extreme, in India, 101 political scientists, divided into four regions with distinctive patterns of national and regional party competitors, completed the survey. In Brazil, 22 experts worked through the survey.

An expert survey raises many methodological flags widely debated in the discipline, and there is no space to review the pros and cons of different data generating channels to establish the empirics of democratic linkage patterns here. Let us nevertheless flag four important issue baskets that come into play:

- ▷ **Do differences in the “expertise” of the “experts” matter?** For each party, and after each survey module A through E, experts answered an item in which they indicated their confidence in their own judgments of parties. Checks in DALP I yielded no substantively meaningful correlations between experts’ judgments and levels of confidence in their knowledge.
- ▷ **Does experts’ political bias come into play in judgments?** Both DALP surveys include a question about experts’ degree of sympathy with the various parties they score in their countries. Thorough analysis of DALP I yielded very few statistically significant and substantively sizeable correlations between expert sympathies and patterns of scoring parties.
- ▷ **Differential item functioning (DIF) of the survey scores?** Experts may interpret the survey scoring scales differently, often contingent upon national context of experiences and debates. For this reason, scoring items have been framed in concrete, close to observable operational patterns and benchmarks for scale interpretation—for example at the beginning of module B about targeted transactions—are provided. DALP II also includes several vignettes at the tail end of the survey enabling scholars to recalibrate survey scores.
- ▷ **The aggregation problem of summary “national” party scores:** National scores of political party attributes and institutions typically hide often substantial subnational variance across places. The variance in experts’ scores of the same attribute of a specific party may be an indicator of the subnational variance of the attribute scored, when controlled for experts’ assessment of the confidence in their own judgment. To correct for subnational heterogeneity, one may therefore consider weighting the mean expert jury score of a party’s attribute by the standard deviation of experts’ judgments and thereby give lower weight to highly heterogeneous assessments in comparative analysis.

In the now following empirical descriptive characterization of party linkages in Brazil we will, however, report only individual party or national party system mean scores, weighted by the electoral size of parties in their systems. More fine-grained data exposition has to await detailed examination. Some of the scattergrams report DALP I 2008 and DALP II 2024 scores of the parties in this country or national scores across countries. Where parties or countries were included in the DALP survey only at one of these two datapoints, scores for the missing data point are entered as zero (0). This means that the party or country positions would be either located on the x-axis, if values are missing for 2024, or on the y-axis, if data points are missing for 2008.

Altogether, the descriptive patterns reported here and the further analyses to be performed with the democratic accountability data set have to be interpreted with caution. Expert judgments involve huge measurement error derived from (1) experts' limited knowledge and experience with the political features they assess, (2) judgment errors that creep in due to the aggregation of assessments to the national level, (3) expert political bias and (4) differential item functioning (DIF) due to myopic localized experience with the party attribute to be scored in the DALP II survey.

These data measurement liabilities imply that no or small sample of empirical attribute observations—say, in one or only a very few countries—are likely to yield reliable and valid insights. Scholars may attribute more confidence in results derived from broad comparative analysis of large numbers of parties and countries in the DALP II dataset.

3 Preliminary Findings: Global Patterns of Party Competition and Brazil in Comparative Context

For the most part, the displays present variable scores at the level of whole countries, scattergrams of political parties, with parties in Brazil singled out, and some tables with more detailed scores. As indicated above, **country scores** constitute the mean of a polity's party scores, with each party score weighted by the electoral share that party obtained in the national legislative election most proximately held before the DALP data collections in 2008-9 or in 2022-4. For purposes of illustration, we will a few times also show scattergrams of the party level. About 280 of the over 600 parties scored in the 94 countries in DALP II were also covered in DALP I. Scattergrams comparing observations at the two time points only include these parties, while national averages include all parties for each time point. So national level changes in a linkage's importance from 2008-9 to 2022-24 do not allow inferences about whether those changes were due to party turnover—the mergers and splits of parties existing in 2008-9, or their demise and the rise of new parties—or due to a genuine change of persisting parties' linkage strategies. More detailed investigations with the DALP datasets of course need to examine both party and country level variance and change over time.

An important descriptive aspect concerns the extent of continuity and change in the features of parties' and entire polities' linkage strategies. Given the lapse of 14 years between the two DALP surveys and the often profound changes that have taken place in the countries covered in these surveys both in terms of political economy as well as the composition of party systems — indicated by the number, relative electoral strength and executive office participation of the competing political parties—it might be a fair prior to expect a great deal of change over time and relatively low leverage, when using a party's or a country's linkage feature in 2008 as predictor of the same feature in 2022-4. The challenge of coming to grips theoretically and empirically with the observation of continuity over time may be therefore just as hard—or even harder—than accounting for the observable changes.

After the Dictatorship of Getúlio Vargas (1937–1945), the Brazilian party system was structured around his political legacy, with three major parties emerging in response to his influence. The Partido Social Democrático (PSD) was composed of bureaucratic elites and rural oligarchs who had collaborated with Vargas and sought to continue his developmentalist policies within a moderate framework. The Partido Trabalhista Brasileiro (PTB) was directly linked to Vargas’ labor policies, mobilizing urban workers and unions under his populist leadership, maintaining his influence even after he left office. In contrast, the União Democrática Nacional (UDN) was fiercely anti-Vargas, representing liberal economic elites and advocating for a reduction in state intervention, frequently opposing both PSD and PTB in their efforts to uphold Vargas’ political and economic model.

In the current democratic period, the party system took its form following the transition from a 21-year military dictatorship (1964–1985) to democracy, culminating in the 1988 Constitution. For most of the dictatorship, a controlled two-party system was in place, with the pro-government Aliança Renovadora Nacional (ARENA) and the opposition Movimento Democrático Brasileiro (MDB). In the transition back to democracy during the 1980s, as all democratic forces were primarily agglutinated into a single party (then called PMDB — Partido do Movimento Democrático Brasileiro), it came to encompass a wide range of ideological positions within the democratic spectrum. As dissident groups emerged, the party’s ideological contours became less defined. In the immediate aftermath of redemocratization, this party system was characterized by high electoral volatility, weak voter-party linkages, and frequent party-switching by politicians.

Throughout the New Republic, it has remained characterized by a vast array of small to mid-sized parties with unclear or weak ideological foundations that operate as a diffuse “middle-swamp,” bargaining their support for the government. However, throughout the 1990s, the party system underwent notable institutionalization, structured around two parties that came to dominate presidential politics. Between 1994 and 2014, the center-left Partido dos Trabalhadores (PT) and the center-right Partido da Social Democracia Brasileira (PSDB, a dissidence of PMDB) won six consecutive presidential elections.

To this day, the PT remains an outlier in terms of programmatic commitment, standing apart from an overall party system characterized by limited programmatic structuring. The party’s competition for the presidency against the PSDB provided structure and stability to the political system, even as both parties gravitated toward more centrist positions once in office. PT also developed a strong linkage with its electorate — a characteristic that persists despite a significant transformation in its voter profile over time. The emerging party configuration resembled that of the first democratic period, with a left-wing party strongly tied to labor unions, this time led by Lula, a figure with popular and paternalistic appeal, and a more liberal right-wing party advocating for a more limited role of the government in the economy.

At the time of the DALP I survey in 2008-09, this PT-PSDB duopoly remained intact, with the Partido do Movimento Democrático Brasileiro (PMDB) serving as the main pivotal coalition partner, usually followed by other small and medium-sized less programmatic parties such as the Partido Progressista (PP) and the Partido Liberal (PL), which would later serve as Bolsonaro’s platform in the 2022 presidential race. By DALP II (2022-24), the economic and political crises of the mid-2010s — exacerbated by the media-driven explosion of large-scale corruption scandals such as Operação Lava Jato — had severely affected both PT and PSDB. On the left, Lula’s PT managed to retain a resilient electoral base, while the right reorganized itself around far-right populist Jair Bolsonaro, who won the presidency in 2018 by mobilizing a strong anti-PT sentiment.

The PSDB, plagued by its weak voter-party linkages, fell into crisis and was ultimately sidelined from national politics. Although the stability of the 1994–2014 period was more evident, political forces are still organized around the PT and Anti-PT poles, with the persistence of a personalistic politics

centered on Lula and Bolsonaro. DALP II then captured Lula’s return to power for a third term that coincided with a right-wing opposition in dispute and search of new leadership, as Bolsonaro faces legal proceedings that bar him from running for office after his attacks on democracy.

While these forces alternate in power, governing coalitions must navigate an extremely fragmented legislature. The post-redemocratization electoral system encouraged party proliferation, leading to a diffuse party landscape with unclear ideological boundaries. As a result, presidents have historically been forced to build broad and often ideologically inconsistent alliances. Only in recent elections have political reforms begun to curb the excessive number of parties.

Brazil’s economic trajectory has been highly cyclical, with strong growth in the 2000s under PT governments, a deep recession in the mid-2010s, and an uneven recovery since 2020. The country has undergone rapid urbanization (with over 85% of the population living in cities) and remains marked by stark inequality, despite significant poverty reduction efforts. Ethnocultural conflicts, though less pronounced than in other Latin American contexts, manifest in regional disparities, indigenous land disputes, and racial inequalities in economic and political representation.

3.1 Programmatic Linkage Effort

To our knowledge, the vast political science literature on elections, parties and party systems offers no detailed measure of the “programmatic effort” or “programmatism” that parties and countries’ entire party systems display. Investigators have operated with the degree to which voters or observers have been able to line up parties on a left-right spectrum or to classify parties as members of “left” or “right” party families. Others have used the amount of variance in voters’ choice among parties explained by voters’ issue positions, once holding constant for socio-demographic background conditions and other factors, as benchmark of party system programmatism. But none of these shortcuts provides a satisfactory general measure that could be meaningfully compared across a wide range of parties and countries. The DALP surveys incorporate a very simple score of programmatism in the summary module E of the surveys, requesting experts to score parties’ degree of programmatic effort on a 4-point scale. But, as in the case of clientelism below, the fine-grained information about experts’ scoring of parties on different issue positions makes it possible to develop a more sophisticated measure of programmatism with the DALP II dataset.

The DALP dataset also makes it possible to detect bias in the experts’ scoring of parties, as it includes an item where experts indicate how sympathetic they are to a party they score. Given that experts are intellectuals and intellectuals prefer programmatic party competition over other linkage strategies, and especially clientelism (see below), is it the case that those who are sympathetic to a political party tend to attribute to it higher programmatism scores than those who are unsympathetic to it? Initial analysis that will need to be followed up with more detailed investigation indicates that, indeed, there is a statistically significant, yet substantively small to moderate bias effect in experts’ scoring of political parties’ programmatism in the direction indicated. At the extreme, the average expert passionately sympathetic to a party would give it an about .13-.15 (depending on model specification, lower with more controls) higher programmatism score on a 0-1.0 scale (or a .40 to .50 higher score on a 1.0-4.0 scale) than the expert who passionately hates a political party.

The DALP I investigations in 2010 led to the construction of an unobtrusive, indirect, and much more detailed measure of parties’ programmatic effort. It builds on what cues and information parties would have to supply to voters to enable the latter to distinguish among parties based on their programmatic positions. Parties need to be (1) internally **cohesive** on the policy position they take

(“Co”), (2) **attribute salience** to those cohesive positions they embrace (“Sal”) so that voters perceive them as consequential for parties’ commitment to govern and these salient positions need (3) to make them distinctive (“Di”) from other parties, if not create issue polarization (“Po”): CoSalDi or CoSalPo.

DALP I measured cohesiveness of a party’s issue position with the standard deviation of an expert jury’s scoring of party j on issue i . Salience was measured only indirectly by the percentage of an expert jury that scored a party on an issue rather than skip the scoring opportunity, with fewer missing values meaning more salience. Polarization was measured by average dyadic distance of a focal party from each of its competitors. This measure increases in a linear fashion, considering more extreme divisions as more programmatic (“CoSalPo”).

DALP II added a modified index. The cohesiveness measure is the same, but now experts rated the salience of each of a party’s issue positions explicitly. Most importantly, the measure of polarization was changed. To allow voters to discern parties programmatically, their policy positions need to be distinctive. Salient, and distinct, but distinctiveness does not imply extremism. DALP II, therefore, capped the maximum party dyad differences beyond which distinctions would not a higher programmatism score. This yielded the new “CoSalDi” issue score.

Party internal unity, salience and distinctiveness of issue positions are all necessary conditions for a voter to use the party’s programmatic signal for her programmatic choice function. If any single one of the three indicator signals is weak or missing, the programmatic voter might discard that issue from her party choice. In other words, the “programmatism” of a party’s issue position is a multiplicative term of **cohesion (CO) × salience (SAL) × polarization (POL) (or distinctiveness: DI)**. We constructed this interaction by first standardizing the observed scores of parties on each of the three components on 0-1.0 scales, thereby weighting each component’s contribution to the programmatism index equally, and then multiplying the component scores, yielding a **CoSalPo** 0.0-1.0 scale (in DALP II: a **CoSalDi** 0.0-1.0 scale) for each party’s issue position.

The next challenge of operationalizing party programmatism concerns how to move from parties’ individual issue programmatism to a **summary aggregate score of each party’s programmatic appeals** when facing competitors and voters. Except for “niche” parties that may focus on a singular salient issue not addressed by conventional parties (Save small farmers Protect the environment! Stop immigration!) or a restricted issue domain, parties have to broaden and diversify their issue stances and are not entirely free to choose issue salience. Legislative parties do not control the policy agenda, are subject to national party system agendas, and therefore have to bundle positions on a broad range of issues to be programmatically attractive—and predictable — to information seeking voters. This does not mean that parties will need to formulate distinctive, salient, issue positions in cohesive fashion across **the entire universe of policy issues**. But a combined index of parties’ programmatic appeals should at least average the parties’ highest CoSalPo (CoSalDi) scores on an issue range commanding the highest CoSalDi or CoSalPo multiples.

For reasons of robustness, we explored a whole range of aggregation rules, but found the following three most useful to deploy in further work:

- **CoSalPo_4 or CoSalDi_4:** Take the two strongest CoSalPo scores of the three economic issue scales in the survey (D1: redistribution to the poor; D2: state intervention in the economy; D3: ensuring encompassing social protection) PLUS whatever two additional issues yield the highest CoSalPo score for a party, whether they are from the common DALP II survey or the country-specific adaptations.

- **CoSalDi_econ:** Take the four strongest CoSalDi scores dealing with economic allocation from the entire list of issues. There are between 5 and 8 economic issues to select from in the national DALP II surveys, depending on how many unique national issues tapped economic distribution.
- **CoSalDi_non-econ:** Take the four strongest CoSalPo scores dealing with non-economic issues on questions of socio-political governance (civil liberties, law&order, individual autonomy, or gender/family) and/or with the delineation of collective identities (multiculturalism, nationalism, migration). Across countries, the number of issues to pick from varies somewhat contingent upon whether unique national issues have economic-distributive character or not.

The individual party summary CoSalPo or CoSalDi programmatism indices, then, permit the creation of **national party system summary scores of programmatism** by averaging the party index scores, weighted by each party’s electoral success in the most recent legislative election preceding the DALP data collection. We are presenting here only the CoSalPo_4 party and CoSalPo_4.nwe national weighted scores (nwe) for 2008-9 and 2022-4, plus a comparison of CoSalPo_4.nwe and CoSalDi_4.nwe for 2022-4. Examining party and national scores for the “old” index — CoSalPo, without new salience variable and no cap on polarization — how strongly are parties and polities deploying programmatic appeals and how has this unfolded over time?

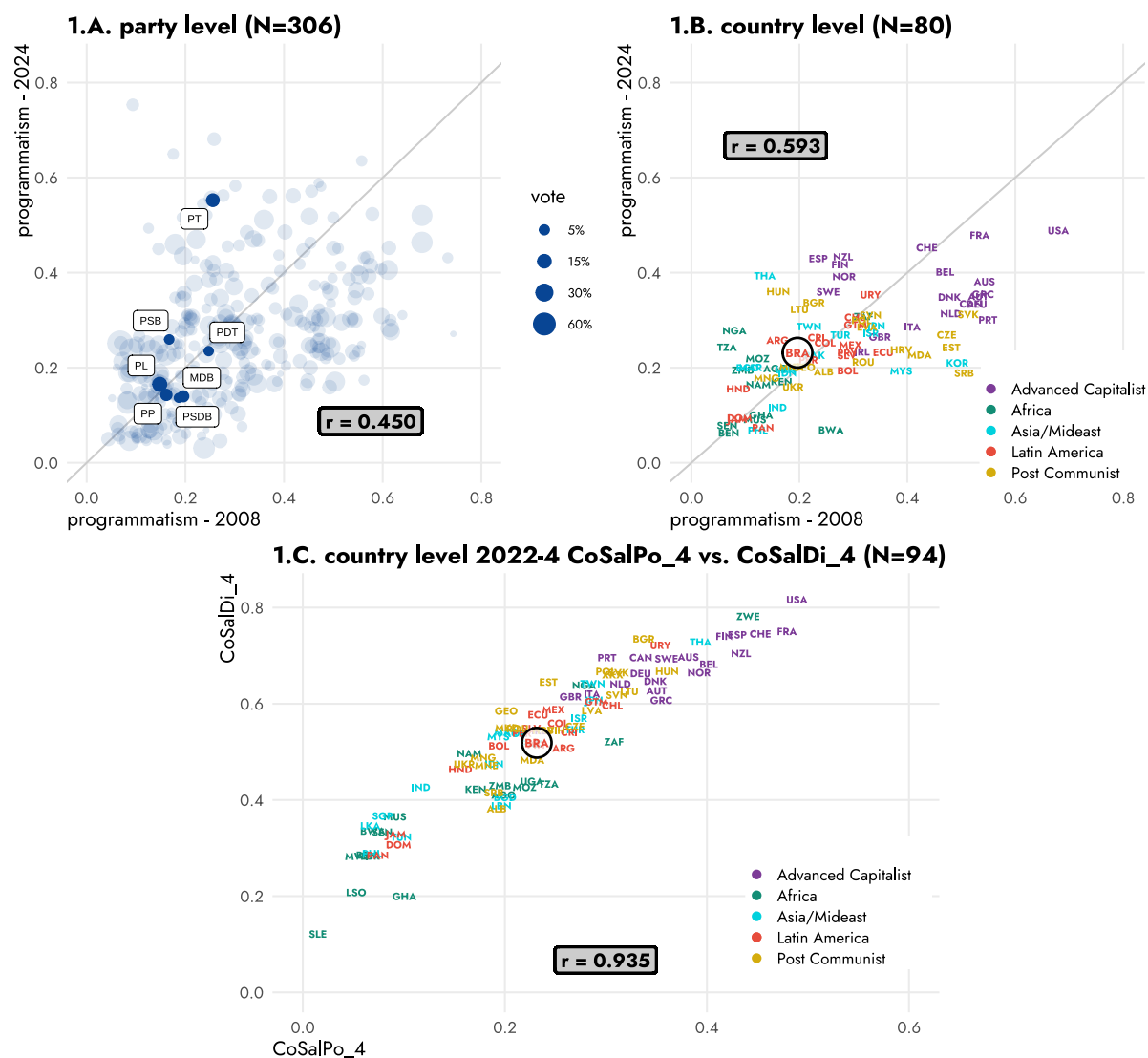
Turning to the data and the relative position of Brazil, Panels 1A and 1B of Figure 1 render scattergrams of the CoSalPo_4 programmatism scores of political parties (1A) covered in both surveys and country averages (1B) for DALP I (2008-9) and DALP II (2022-4). The diagonal lines indicate where parties (countries) would be situated, if there was perfect congruence between the two datapoints. Given the unavoidably large measurement error with indicator building exercises of this nature, the data reveal substantial stability over time. Naturally, there is more variance at the level of individual parties than among country averages. The established Western democracies come out as most programmatic and polarized — led by the United States — compared to other regions. Sub-Saharan African parties and democracies, as well as many of those located in Central America and the Caribbean, signal the least programmatic effort by their parties. At the national level, Scandinavian parties’ CoSalPo_4 was unexpectedly low in 2008-9, and at the time even after thorough investigation in collaboration with country anchors no specific reason for these unexpected scores could be established. CoSalPo_4 2022-4 scores in this region move those countries back into line with expectations.

Panel 1C compares 2022-4 CoSalPo_4.nwe and CoSalDi_4.nwe scores at the country level. So, in CoSalDi there is no linear higher score for extremism beyond a threshold level of distinctiveness awarded and salience is based on a direct expert score on an original raw 1-10 scale. Moreover, the four highest CoSalDi issues are drawn from a somewhat richer set of issue topics. As a consequence, many parties and countries show somewhat higher levels of programmatism than in the previous CoSalPo_4 scoring scheme. Nevertheless, the correlation between both scoring schemes and the general relative location of different parties, countries, and even regional clusters remains about the same across both measurement strategies. Checking the scatters relative to the diagonal line indicating where perfect stability over fourteen years would be situated, it appears that there was, on average, a moderate increase in programmatism over time at least at the national level. There are more countries above than below the diagonal continuity line. Yet this finding clashes a bit with the party level scattergram 1A that shows more continuing parties with declining programmatism than increasing programmatism. Future analysis will have to resolve this tension by checking whether new parties that did not exist in 2008-9 and are therefore not mapped in Panel 1A, but contribute to a country’s average national CoSalDi scores in 2022-4 are systematically more programmatic than older parties that persisted over a period of typically more than a quarter century.

The data clearly establish that the party foundations of democratic “responsible partisan government” based on parties advertising distinctive policy platforms is a work in progress for many individual parties and in many electoral democracies. **Programmatic partisan appeals scarcely register in many parties and countries!** It is therefore empirically inaccurate to presume that the democratic game is one of competing policy positions and claims everywhere. So, what other linkage mechanisms might parties bring into play? Let us check out first those requiring quite little organizational and informational effort on the part of politicians and their parties.

Brazilian political parties rely only to a limited extent on programmatic linkages, as evident from their placement in Figure 1A. When aggregated across all issues, this holds for all major Brazilian parties except PT, positioning them in the lower third of the distribution of parties that existed in 2008–09 and 2022–24. PT stands out as an outlier, particularly in the latest DALP edition: while it was close to other national parties in 2008–09, it reached a relatively high programmatic level in 2022–24, even in comparison with countries outside Latin America.

Figure 1: Programmatic Linkage Effort (CoSalPo_4) 2008-9 and 2022-24



Note: In all figures in this dossier, N in plot titles stands for the number of countries or parties for which valid information is available for both the X and Y axes, while r , labeled in the plot, is the simple correlation coefficient between the two variables in the scatterplot.

At the national level, Brazil's party system appears to have placed slightly greater emphasis on programmatic competition in 2022-24 than in 2008-09 (Figure 1B) — an outcome likely driven by PT's new positioning. Its national-level score aligns with the average of Latin American countries. Regarding CoSalPo_4 and CoSalDi_4 index scores — which capture programmatic economic issues related to income distribution, state intervention, and social security — Brazil sits near the global median, close to other Latin American, post-communist, and Asian/Middle Eastern countries.

While consistent with Figure 1, Table 1 allows for a closer examination of individual party scores across parties and over time. Between DALP I and II, there is no substantial change overall, except for a recent increase in PT's emphasis on programmatic appeals regarding economic issues. On the left-of-center side of the political spectrum, parties tend to compete more prominently on broad economic issues (such as redistribution to the poor, state intervention in the economy, and social protection—reflected in their CoSalPo_4, CoSalDi_4, and CoSalDi_econ scores) than in non-economic issues (such as questions of socio-political governance and the delineation of collective identities). Notably, PSOL registers the highest score on the non-economic index, reflecting expert assessments of its strong stance on issues related to civil liberties and gender. On the right-of-center side, parties tend to compete weakly on programmatic grounds overall, with sometimes relatively greater emphasis on non-economic issues in the case of religiously affiliated parties such as PSC and REP.

Table 1: Programmatic Appeals of Political Parties in Brazil

	Support in legislative elections before DALP		DALP I	DALP II			
	DALP I 2008-9	DALP II 2022-4	CoSalPo_4 (I)	CoSalPo_4 (II)	CoSalDi_4	CoSalDi_econ	CoSalDi_NON-econ
Parties in both 2008-9 and 2022-4							
PL	4.35	16.64	0.1480	0.1651	0.4293	0.3370	0.3112
PT	16.55	12.10	0.2557	0.5525	0.8911	0.8154	0.4867
PP	7.40	7.95	0.1614	0.1428	0.4073	0.3086	0.3051
MDB	13.90	7.19	0.1958	0.1397	0.3689	0.3485	0.3234
PSB	5.70	3.81	0.1672	0.2595	0.6373	0.6211	0.3618
PDT	5.15	3.50	0.2473	0.2349	0.6199	0.6356	0.3451
PSDB	13.85	3.02	0.1866	0.1364	0.4140	0.3587	0.3250
Parties only in 2008-9							
PFL	12.10		0.1689				
PTB	4.65		0.1456				
PPS	3.45		0.2004				
PCdoB	2.15		0.2344				
Parties only in 2022-4							
UNIAO		9.34		0.1251	0.4151	0.3925	0.2377
PSD		7.58		0.1353	0.3789	0.3258	0.3046
REP		6.96		0.1167	0.3823	0.2811	0.3340
PSOL		3.52		0.6563	0.9442	0.7234	0.5899
PSC		1.78		0.1453	0.4970	0.2416	0.4170

The various indicators of programmatism in individual parties and entire party systems deliver one unambiguous message: There is a great deal of variance even in the strenuous efforts parties invest in creating programmatic linkages to their voters, when focusing on their most cherished issues. In some parties — and countries — programmatism is quite intense, in others it appears to be a more secondary strategy. In very few parties and countries, however, programmatism plays no role at all. Programmatism is always a component of parties' linkage profiles, albeit to a varying extent.

Applied to Brazil, political parties have engaged in comparatively limited programmatic appeals as a way to mobilize electoral support — with PT and PSOL being a notable exception in recent years.

So it may be expected that most Brazilian political parties emphasize other channels of resonance with voters still to be explored — leadership personality, ethnocultural descriptive representation, valence-economic performance, clientelism? — to entrench themselves in the electorate.

One implication of this pattern of programmatic linkages is that a crucial premise of the normative and positive responsible partisan model of representative democracy is empirically weakly articulated in many democracies. Parties and party systems in these instances are either feebly responsive to their electoral constituencies or have to generate political linkage in other ways. These are the mechanisms explored next, in an order starting from linkages that require rather few organizational party investments on the part of politicians and informational attention on the part of voters to those that are more demanding in this regard.

3.2 Personalistic Linkage Effort

Name recognition of individual politicians may result from many sources but become particularly important for the electoral fortunes of political parties, if they have a hard time investing in other, more resource- and organization-intensive transactional forms of political linkage. New parties, novel party systems, parties during and after a systemic crisis all thrive on featuring political “saviors” to novel challenges by impersonating their claims in a “savior” personality. Both DALP surveys ask experts to rate the importance of individual personalities, their personal coattails that may be associated with the quality of “charismatic” authority, for the linkage appeal of parties in their countries.

Figure 2: Emphasis on Personalistic (Charismatic) Party Leadership Trait Linkage, 2008-9 and 2022-24

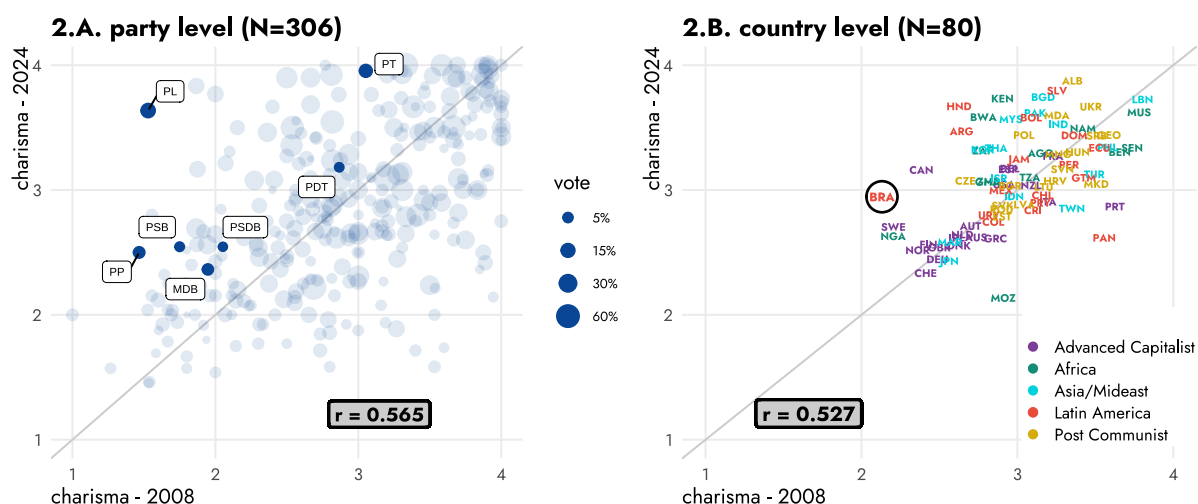


Figure 2A reveals a message about the use of personalistic linkage by parties that experts rated both in 2008-9 and 2022-24 that Max Weber already delivered. While there is some continuity over the span of more than a decade, personal appeal is a fleeting, variable quality of politicians that easily vanishes over time. Many parties that showed strong personalistic leadership appeal in 2008-9 have lost that quality in 2022-24, but other parties made up for this by increasing the profile of their party leaders. Also Figure 2B reveals that when aggregated to the country level — aggregating older and younger political parties, with the latter not being included in Figure 2A — there is no substantial increase or decline of personalistic linkage appeal over the 14-15 year time span. The variance in the role of leadership personality for linkages over this period appears to be stronger in less institutionalized party systems in newer democracies of Africa, Asia and Eastern Europe, whereas the highly institutionalized

Western party systems devote relatively little emphasis to leadership personality and coattail effects. The widely prophesized personalization and “presidentialization” of Western parliamentary democracies are not echoed by these data.

With regard to Brazil, the relatively low importance of personalism and charismatic leadership, coupled with the weakness of parties’ programmatic politics, suggests that most parties rely on other channels to establish their electoral appeal. Compared to other countries, Brazil ranks below average in both DALP I and II, though a notable shift occurred between 2008-09 and 2022-24. PT remains an outlier, exhibiting a relatively high level of charismatic party leadership due to Lula’s influence, though this has not changed significantly over time. The primary driver of change appears to be PL, the party Bolsonaro chose to launch his candidacy in 2022, which substantially increased the national average level. Thus, the current below-average ranking masks a high degree of heterogeneity among parties, with Lula and Bolsonaro still relying heavily on charismatic appeals.

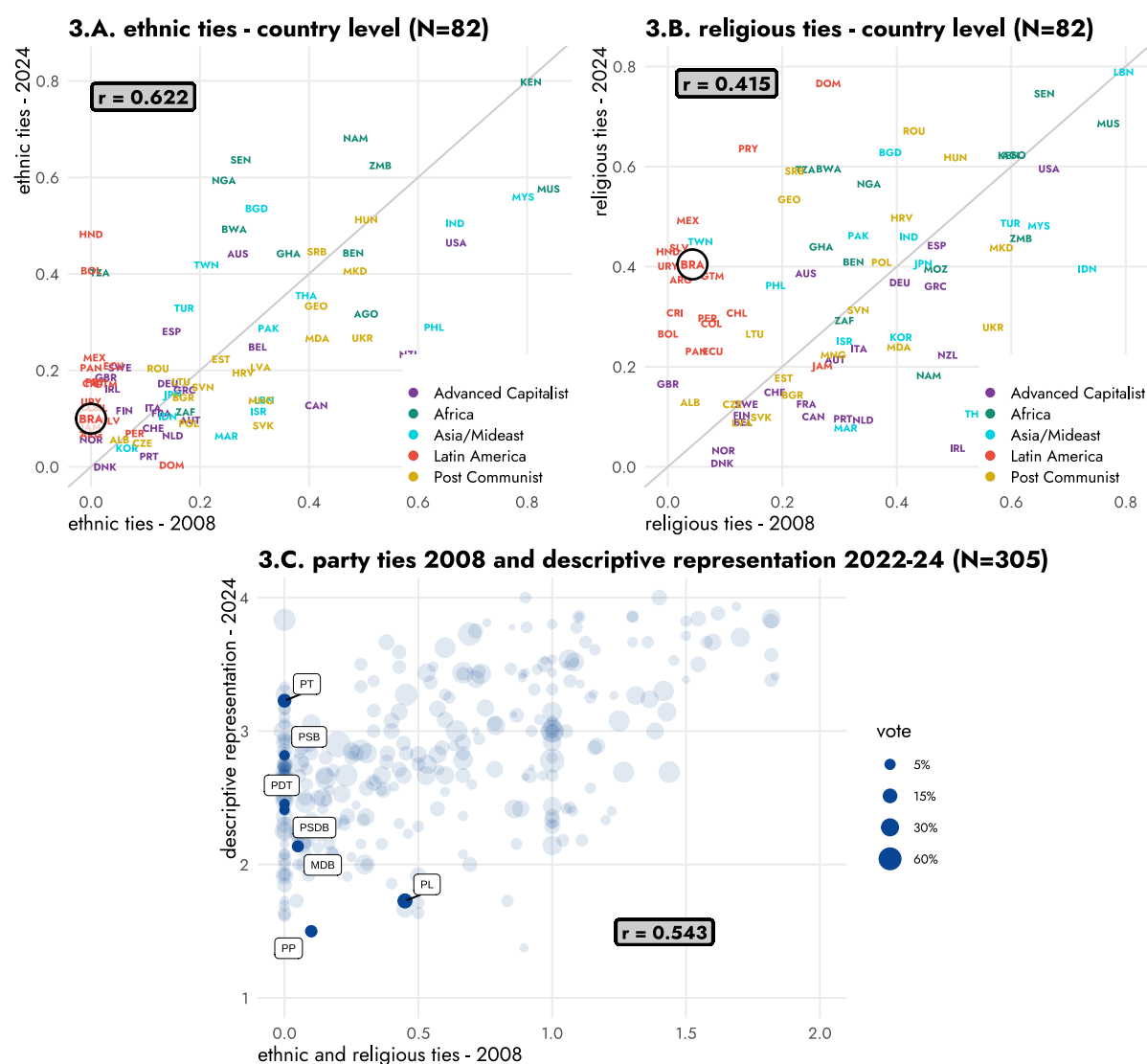
3.3 Linkage through Descriptive Representation

Descriptive representation builds on human traits that are instantly recognizable to most adults in almost any social interaction and quickly interpreted in their political significance against the background of everyday experiential knowledge about relations of kinship, markets, and public affairs: gender, place of residence, ethnicity, race, language or religion. Often enough, voters need to engage in little information processing to codify whatever signals of descriptive representation parties are emitting. And politicians need not make much effort to feature such traits, although the presence and strength of organized socio-cultural networks disseminating the descriptive representation signals may very much amplify their mobilizational capacity.

DALP I did not ask a summary question about the relevance experts attribute to a party’s efforts to mobilize through descriptive representation, generically conceived, but it had experts score the importance of organized ties to cultural associations of a religious or ethnic stripe. DALP II replicated these questions but added an explicit inclusive item about the role of descriptive representation for partisan mobilization, with six modes of descriptive representation listed (language, region of residence, gender, religion, ethnicity and race). Figures 3A and 3B report the national averages of political parties scored as exhibiting dense ties to ethnic or religious associations in 2008-09 and 2022-24. Panel C (Figure 3C), then, combines experts’ scoring of ethnic and religious ties in 2008 (horizontal x-axis scoring) and relates it to the more inclusive descriptive representation DALP II score in 2022-4 (vertical y-axis), albeit at the more fine-grained party-level, mapping the relationship among durable political parties observed both in 2008-9 as well as 2022-24.

Once again, there is a great deal of continuity, captured in the correlations for 2008-9 and 2022-24 country averages of ethnic and religious partisan ties, but also divergence, with select parties in some countries substantially increasing their ethnocultural moorings and others loosening them. But the extreme areas of the diagrams are empty. Entire party systems did not go from low to high descriptive linkage politics to the opposite extreme. Countries at the lower end of descriptive representation in both surveys tend to be Western democracies, with the glaring exception of the United States which scores high on both. There is no over-time trend visible in the data that either religious or ethnic descriptive representation may have decreased or increased. Panels 3A and 3B omit the Latin American countries, as the Spanish translation of the DALP I survey question unfortunately restricted experts to indicate a single type of associational linkage among seven options (business, workers, women’s, ethnic, religious, neighborhood, ecological) for each party, whereas scoring templates in other countries instructed experts to check whichever linkage type applied to a party.

Figure 3: Party Bonds to Civic Associations 2008-9 and 2022-24, and Descriptive Representation 2022-24



Note: In this figure, data from DALP I referring to Latin American countries are not comparable with the most recent version due to a questionnaire issue (see DALP I Codebook for more information).

Consistent with that pattern of trendless continuity and diversity, when scoring parties' reliance on descriptive linkages writ large in 2022-24 and comparing them to ethno-religious partisan linkages only in 2008-9, such inclusive 2022-24 linkage scores tend to be higher than the ethno-religious linkages only (Panel 3C). It is in this additional increments — especially among parties that did not exhibit religious or ethnic ties in 2008-9 — where modes of descriptive representation come into play that were not tapped in 2008-9, such as concerning regionalism, language and gender relations.

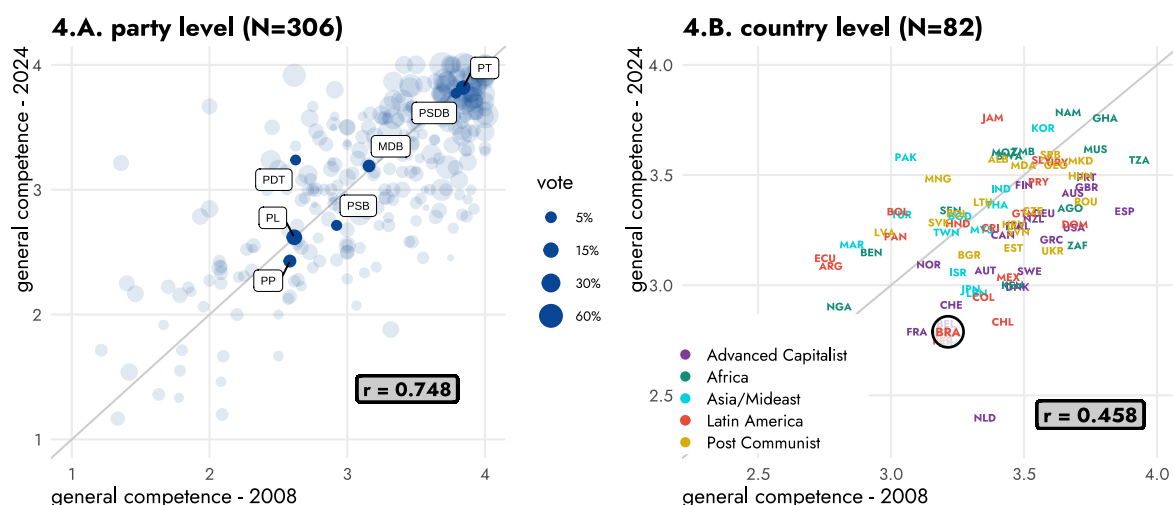
In Brazilian politics, descriptive representation based on ethnic and religious ties has played a limited role in party competition. The country scores particularly low on the ethnic ties index (Figure 3A). Due to a questionnaire issue affecting DALP I data for Latin America, temporal comparisons are difficult. Still, the national average for religious ties now places Brazil in a relatively notable position, close to the median (Figure 3B). This is largely driven by the Anti-PT segment of the electorate becoming more organized along religious lines. In recent decades, there has been a reaction to the PT administrations' perceived advancements in the cultural agenda, especially regarding LGBT rights. At

the party level, Figure 3C shows that PT and other center-left parties, such as PSB and PDT, show relatively higher scores in descriptive representation, likely reflecting their strong regional bases in the Northeast, where the population includes a higher proportion of Black voters.

3.4 Governing Record and Reputation for Capacity to Govern as Linkage Mechanism

Valence-competence-governability mechanisms of linkage building work mostly for or against government incumbents, and through retrospective economic voting about real income levels, growth, inflation, and social security. On occasion, major legislative achievements, or the management of momentous crises (financial, terrorism/war related, natural catastrophes), may enter the “brand” of political parties and contribute to their halo of solving governability challenges. On the negative side, a history of corruption may taint the capacity of parties to invoke governability as a linkage appeal. With regard to economic performance, but probably even more so when it comes to party performance facing military-terrorist challenges or natural catastrophes, the individual level mechanism is likely to be a mode of socio-tropic appraisal, where voters consider the impact of party performance on the collective, not primarily egocentrically on just one’s very own fortunes within a macro-societal context. But egocentric and sociotropic evaluation are closely intertwined: If a party is perceived as mismanaging a crisis and exposes many people to harm, even an unaffected voter may reason that support of the party is risky and she may not get off lightly the next time that very same party is called upon to face a challenge.

Figure 4: Valence-Competence-Governability Linkage 2008-9 and 2022-24



Concerning durable, more institutionalized parties covered by both DALP I and II, experts’ assessment of parties’ inclinations to run on their capacity to govern is extremely consistent across the 13-15 year time span from 2008-9 to 2022-24. This continuity is a bit less clearcut when inspecting aggregate national level averages of parties deploying this linkage mechanism. The difference is probably due to the fact that the latter information incorporates the many new parties that have entered party competition in most countries, including the established Western democracies, over the past fifteen years. The decline in parties’ ability to use their capacity to govern as competitive linkage appeal is particularly pronounced among affluent Western European and Anglo-Saxon settler democracies, here identified by the region enclosed by the red oval situated substantially below the 2008-9/2022-24 performance indifference diagonal. In all these countries, experts view parties now as much less able to rely on

governability appeals than they did in 2008. The fallout of the financial crisis no doubt has contributed to this change of mind.

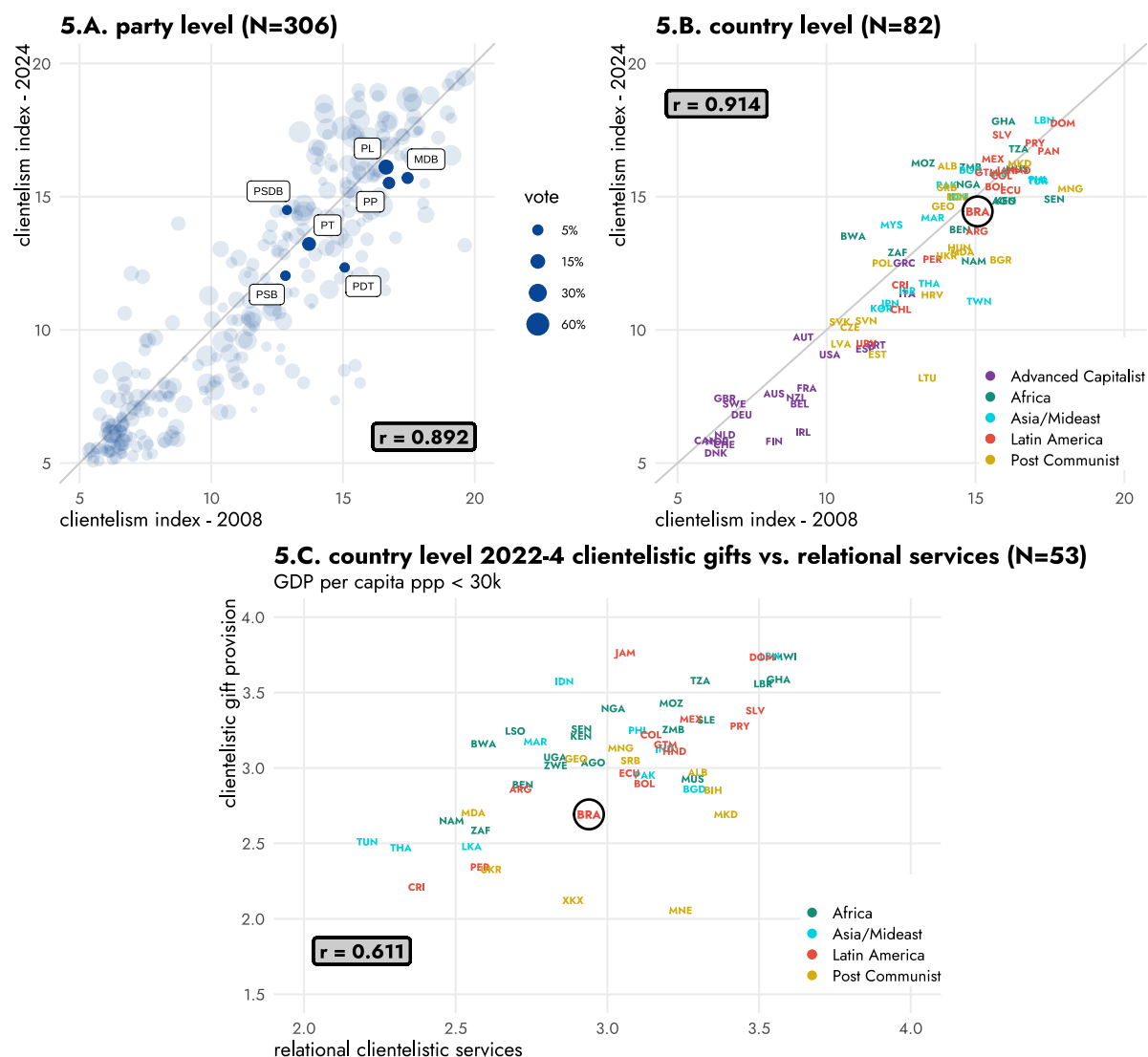
When it comes to Brazil, mediocre economic growth during the 2010s, coupled with the outbreak of large corruption scandals, appears to have slightly diminished the perception of general competence from 2008-9 to 2022-24. However, an examination of individual Brazilian parties in the DALP I and II surveys shows that PT still stands out as the leading party, with the longest record of being ahead of the government. PSDB remains relatively close, as it also has a significant history of leading the government and is the only party besides PT to have reelected a president. In contrast, PL and PP are perceived as having lower governing capacity in terms of linkage mechanisms, as they are primarily seen as parties that form congressional coalitions rather than leading the Executive branch.

3.5 Direct Targeted Exchange with Aspiration of Specific Conditionality: Clientelist Linkage

Both clients and patrons presume and declare their exchanges to be contingent upon the other side's performance, but in practice both often defect (clientelism as "leaky bucket") and clientelist exchanges are rarely monitored, let alone enforced with sanctions. The consummation of contingent exchange is mostly aspirational. Nevertheless, indirect observation of the participants, organizational networks, self-enforcing deals, normative commitments, and the absence of powerful alternative linkage strategies often enough make partisan supply side and voter demand side actors enter such interactions. Clientelist linkages come in different stripes. On the one hand, there are spot-market interventions, mostly during campaigns, in which politicians attempt to materially induce, rhetorically persuade or maybe even verbally intimidate and threaten voters into supporting them. Voters often expect and even request such activities and the currency of exchange may be treats, entertainment, regulatory easements, and especially gifts which sometimes may include outright vote buying although most electoral laws formally outlaw that practice. On the other, there are sustained practices of "relational" clientelism, extending across electoral terms, in which political parties may supply patronage employment, social benefits that involve administrative discretion (e.g. access to unemployment or disability insurance, award of subsidized or state-owned housing, access to health facilities, etc.), or government procurement contracts to favored employers who then use their authority to induce wage earners to support the boss's favorite candidate or regulatory easements and favors.

In a global comparison, spot-market and relational clientelism techniques are empirically sufficiently correlated to create a single index of parties' electoral effort with clientelist inducements (B15). Panels A and B of Figure 5 display the experts' scores on this consolidated clientelism index for individual parties and countries in 2008 and 2022-24. There is just an amazing congruence between the scores across 14 years, yielding almost perfect correlation! An important implication is that apparently not much changed inside individual countries' party systems with increasing age of democracies, repeated rounds of party competition and often growing development and household affluence in their economies. Only in a handful of countries did clientelist practices substantially decline over time (Lithuania, Taiwan, Bulgaria, Argentina, Senegal...) (Figure 5, Panel B). It is the rare outlier country or party to which experts attest a meaningful effort to withdraw from clientelist practices.

Figure 5: Clientelistic Linkage 2008-9 and 2022-24



Heterogeneity of clientelistic practices between spot-market interventions and relational clientelism comes more into view when zooming in on differences between clientelistic transactions in countries with less than \$30,000 GDP per capita in Purchasing Power Parity (Figure 5C). It appears that substantial spot-market clientelism prevails mostly among poor countries in Sub-Saharan Africa, whereas relational clientelism is relatively more pronounced in Latin America and Eastern Europe. Consider that the scale for spot-market clientelism runs from 1 through 4 and that for relational clientelism from 4 through 16 so that the indifference diagonal of equal relative runs from 1/4 through 2/8 and 3/12 to 4/16. High spot-market effort in the upper third of the scale equals scores of 3 or greater, strong relational clientelism scores of 12 or larger.

How do the parties and the entire party system of Brazil figure into linkages based on clientelist exchanges? Figure 5A indicates that experts attribute some degree of clientelist efforts to relevant Brazilian parties, with patterns from DALP I persisting in DALP II. PL and PP score highest on the clientelism index, reflecting their known lack of clear ideological consistency and frequent willingness to support the government in exchange for ministerial positions or budgetary amendments. In a cross-national comparison, this places Brazil within the top third of countries in terms of parties' reliance on clientelist linkages (Figure 5B). Brazilian party clientelism appears to be relatively balanced between

spot-market transactions and institutionalized relational clientelism, with the country scoring close to the global average on both dimensions.

As in case of the programmatism indices, a warning about substantively minor to moderate bias effects in experts' scoring of parties' clientelist transactions is in order. Initial explorations indicate that experts extremely unsympathetic to a party score that party's clientelism indicators about 13-23% higher than experts who are extremely sympathetic to the party (depending on model specification, at the low end with more controls). Since the majority of experts are not situated at the extremes of their party sympathy scales, and since the dispersion of party means over the entire clientelism scales is very wide, the substantive effect of bias on parties' (and countries') clientelism scores is therefore muted: It cannot affect much the relative positioning of parties' clientelism scores in the overall distribution across parties within countries or across all parties across countries, nor the average linkage scores aggregated to the country level.

One of the main areas of intense clientelism research in recent years has been focused on determining how exactly exchanges that the participants pretend to be contingent, but that de facto offer multiple opportunities for all sides to defect, as many contributions are unobserved and cannot be sanctioned, are empirically implemented with some measure of electoral success. A great deal of this research has focused on the role of intermediaries or "brokers" who organize the exchange between electoral candidates and voters. DALP II ran a battery of questions asking country experts to indicate the status of brokers in the exchange process. Candidates can rely on internal brokers who are paid party operatives or volunteer activists and on civil servants who are typically parachuted into their roles as a matter of party patronage. They can also draw on external notables and contractors, sometimes even criminals. Brokers, in turn, may have durable or intermittent singular dealings with brokers and/or clients in the exchange. Moreover, voters may have stationary or progressive career ambitions, with the latter striving to become electoral patrons themselves.

What are the broad patterns in which political parties employ brokers in clientelistic relations? Are there common configurations of brokerage use that characterize clientelistic parties? In order to answer this question, two steps are here involved. First, we restrict investigation of this question to the dataset incorporating only those parties for which clientelistic effort does matter. As a lower threshold, we posit a value aggregate clientelistic effort of 10.0 (B15). This leaves more than half of the 623 parties in the full DALP II dataset in the sample. Second, a factor analysis of how parties deploy brokerage practices among those 340 parties reveals clusters and variations of patterns of brokerage utilized by these parties. A varimax rotated factor analysis generates a major and a minor factor along which political parties vary (Table 2). The first factor discriminates between parties that involve brokers for the long haul and rely brokers on a more volunteer, uncompensated basis from parties that rely on only short-term brokerage relations and little reliance on uncompensated volunteers. The second factor separates parties that involve brokers mostly based on instrumental case-based performance rewards, whether as paid internal party functionaries (C1_2), external notables and contractors (C1_4), or even in criminal pursuit of material acquisition (C1_5).

Table 2: Principal Component Factor Analysis of Party Brokerage Services

Factor Variance Decomposition				
	Variance	Difference	Proportion	Cumulative
Factor1	1.8992	0.3965	0.6459	0.6459
Factor2	1.5027	.	0.5111	1.1570

Factor Loadings and Uniqueness			
Variable	Factor Loadings		
	Factor1	Factor2	Uniqueness
C1_1 Civil service	0.1986	0.2333	0.9061
C1_2 Paid party operator	0.2253	0.6893	0.4740
C1_3 Volunteer party activist	0.4256	0.1329	0.8012
C1_4 Local notables	0.0975	0.6113	0.6169
C1_5 Criminals	-0.0597	0.5883	0.6503
C2 Long-term broker relation with candidates	0.8883	0.1162	0.1975
C3 Long-term broker relation with voters	0.8612	0.0525	0.2555
C4 Brokers strive for electoral career	0.2899	0.4683	0.6966

Table 3 itemizes the clientelistic efforts attributed by experts to Brazilian political parties in DALP I (2008–09) and more recently in DALP II (2022–24), distinguishing between spot-market and relational exchanges. Parties seen as less programmatic and positioned on the right of the political spectrum all engage in clientelism to some degree. This includes PL, PP, UNIAO, PSD, MDB, REP, and PSC — all of which combine spot-market and relational clientelism, relying more on instrumental-remunerative broker relations through hired party operatives than on long-term ties with brokers. PSDB had a relatively lower clientelism index in DALP I, but has recently moved closer to the group of less programmatic parties. Among left-of-center parties, experts attribute a moderate degree of both spot-market and relational clientelism to all of them except PSOL. In terms of broker relations, a different pattern emerges when compared to most right-wing parties. While PSB and PDT strike a balance between remunerative and associational broker ties, PT and especially PSOL focus primarily on long-term relationships.

Table 3: Profiles of Clientelism in Brazil

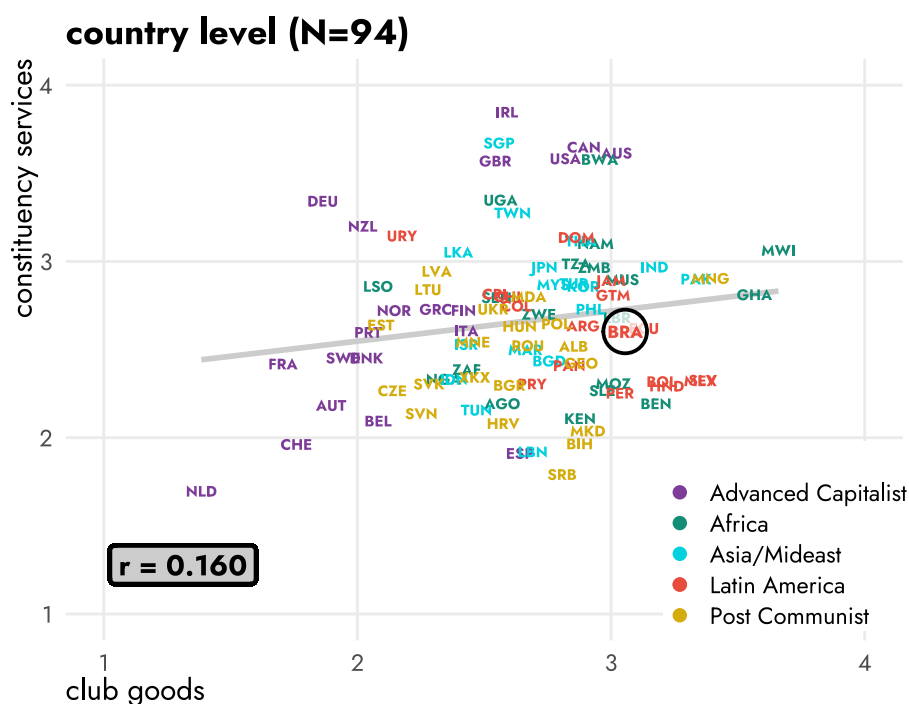
	Support in legislative elections before DALP		DALP I		DALP II			
	DALP I 2008-9	DALP II 2022-4	Spot-market clientelism B-1 I	Relational clientelism B-2-5 I	Spot-market clientelism B-1 II	Relational clientelism B-2-5 II	Scores for factor 1	Scores for factor 2
Parties in both 2008-9 and 2022-4								
PL	4.35	16.64	3.4167	3.3042	2.9444	3.2918	−1.6565	0.1514
PT	16.55	12.10	2.2667	2.8610	2.2632	2.7412	1.4708	−0.3475
PP	7.40	7.95	3.3333	3.3531	2.8235	3.1735	−1.2910	0.1760
MDB	13.90	7.19	3.3333	3.5297	3.2105	3.1235	0.0732	0.1172
PSB	5.70	3.81	2.3636	2.6129	2.2105	2.4561	0.1625	−0.9908
PDT	5.15	3.50	3.0000	3.0160	2.3684	2.4939	0.4839	−0.4913
PSDB	13.85	3.02	2.1429	2.6828	2.6842	2.9544	0.5697	−0.3223
Parties only in 2008-9								
PFL	12.10		3.5385	3.4336				
PTB	4.65		3.4286	3.5002				
PPS	3.45		2.0769	2.4346				
PCdoB	2.15		1.5714	2.1885				
Parties only in 2022-4								
UNIAO		9.34			2.8667	3.0281	−0.8847	0.0089
PSD		7.58			2.6667	2.9369	−1.2589	−0.3609
REP		6.96			2.8750	2.9781	−0.5010	−0.2879
PSOL		3.52			1.6316	1.7697	1.5571	−1.4049
PSC		1.78			2.8000	2.8283	−0.7861	−0.4625

3.6 Direct Targeted Exchange without Specific Conditionality: Pork and Constituency Service Linkage in Brazil

There is a sliding scale between clientelism, pork, and constituency service. All three of them target circumscribed groups, but there is more discretionary leverage and aspiration of implied contingency among those who organize clientelist exchange, both on the demand and the supply side. Clientelist exchange involves more fine-tuning toward voters whom candidates and their brokers hypothesize to be receptive to clientelistic inducements. Pork essentially involves a geographical approach to providing a club good in the hope that it will resonate with some citizens enough to spin their vote toward the credit-claiming politician. With constituency service the underlying theory of linkage is even more nebulous and diffuse: Office incumbents provide services — for example facilitating and expediting administrative procedures, such as getting a passport or a home building permit — in the vague hope that some beneficiaries will remember that service at election time and support the incumbent’s reelection bid.

DALP I did not ask experts to appraise parties’ constituency service and pork provision. So, the scattergram (Figure 6) here cannot combine expert judgments of the same activity at the times of DALP I and of DALP II. Instead, it presents experts’ judgments of unconditional provision of club goods (“pork”) on the x-axis and constituency service on the y-axis, aggregated to the level of average effort among countries, weighted by their electoral footprint. There is not any obvious correlation between the two practices, but the data reveal some familiar themes of the existing political science literature. Both particularistic practices — constituency service and pork provision — tend to be more prominent in single-member district electoral systems, as individual representatives are accountable to a precisely defined spatial constituency (see, for example, all the countries enclosed by the green oval). Likewise, there appears to be a generic aversion to the provision of particularistic benefits—and particularly those of the “pork” variety — in the most developed Western parliamentary democracies with proportional representation, net of institutional considerations concerning district size and the incorporation of personal candidate preference voting in PR systems through open list ballots.

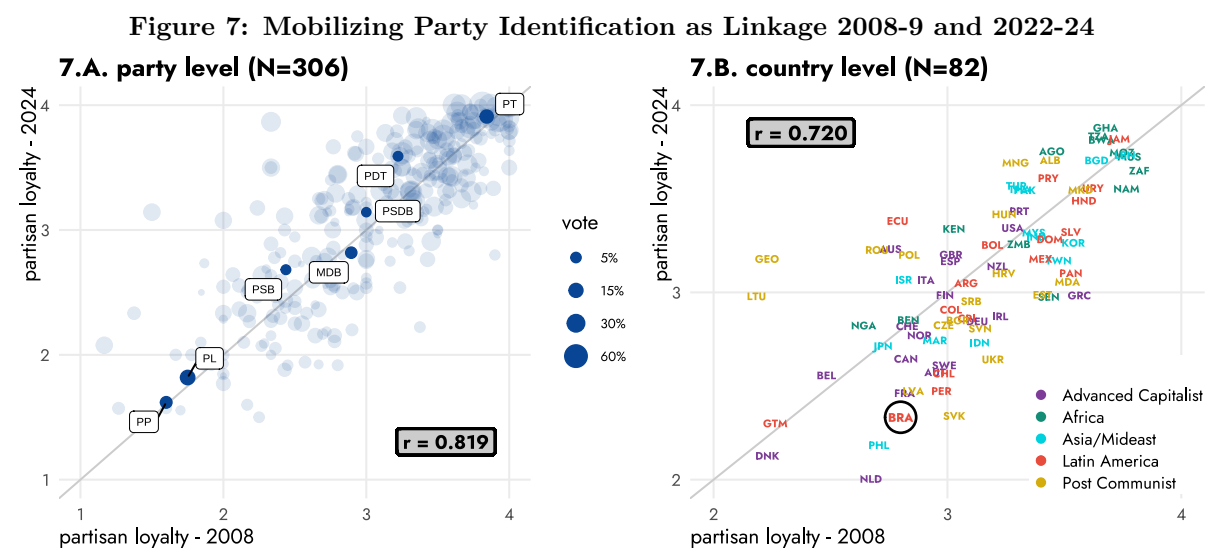
Figure 6: Targeting of Constituencies through Pork and Constituency Service Linkages 2022-24



Brazil is a country with proportional representation through open-list ballots, which may intensify personal candidate preference in vote choice and even incentivize competition within parties. These institutional parameters alone make club goods, pork provision, and constituency service attractive strategies for politicians and voters to establish linkages, strengthening individual candidacies. The country is known for implementing solid national-level programmatic anti-poverty programs that reach more than one-fifth of households. However, this does not entirely prevent particularistic exchanges, particularly at the local level. The scatterplot in Figure 6 confirms that the Brazilian party system occupies a relatively high position, especially in the provision of club goods.

3.7 Mobilizing Party Identification as Linkage Strategy

Finally, consider citizens' identification with political parties — as well as parties' active mobilization of party identification in emotional appeals and use of symbols, often referring to the historical legacy of the party's quest — as something like a capstone to all the other activities parties may choose to build linkages, taken together: If parties can look back on charismatic founders, cultivate credible descriptive representation, have proven capacity to govern in moments of critical junctures and crises, develop clientelistic machines and/or encompassing political programs resonating with large tiers of the electorate, then they might also be expected to thrive on honing and mobilizing collective party identification.



Again, experts' judgments comparing DALP I and DALP II exhibit very considerable continuity in assessing individual parties' and entire countries' party system deployment of appeals to party identification for electoral purposes from 2008-9 to 2022-4. At the same time those parties (and countries) that already made strong use of party identification at the earlier point in time now appear to be just as much or even more so inclined to use this symbolic-cultural technique of collective consciousness raising and crafting confluence of party elites with electoral followers around a common collective party identity and political memory. Interestingly, the most established Western democracies, with the glaring exception of the United States, situated in the upper third of the distribution, appear to generate weak and over time declining party identification, particularly in the most fragmented party systems (Belgium, Denmark, Netherlands). Party fragmentation clearly has undermined allegiance to individual brands,

although many studies show that most vote switching takes place within the same ideological “region” of the party system space, albeit among multiple close alternatives.

Party identification in Brazil tends to be weak on average (Figure 7A and B), but it is highly variable. The highest outlier is the current ruling party, PT, followed by PDT, which has launched Ciro Gomes as its candidate in recent elections. Experts attribute a low level of party identification to Bolsonaro’s PL, likely because the party recently gained many new voters solely due to the figure of the far-right former president, raising doubts about the strength of their emotional attachment to the party. Figure 7A highlights the asymmetrical institutionalization of the party system, with a long-established identification on the left, while the right-of-center electorate remains much more volatile in terms of party affiliation.

3.8 How Linkages Hang Together: Linkage Profiles

DALP I and II cover eight major linkage modes potentially binding parties and voters together in electoral and liberal democracies. Are these practices situated in an orthogonal relationship to one to another, such that there is little or no cross-fertilization, mutual reinforcement, or trade-off between any of them? So, do politicians deal with eight distinct and segmented linkage mechanisms? Or is there affinity between subsets of them? Let this be addressed in two stages, first by an exploratory factor analysis, with varimax rotated factors. This may provide first clues about the structuring of linkage modes in more complex “linkage profiles.” Second, we may take a closer look at the pure relationship between the linkage mechanisms that are often presumed to occur in a straight-forward trade-off relationship, namely clientelism and programmatism: More of one is supposed to mean less of the other. And how does this play out in Brazil?

Panel 4.1 in Table 4 provides these factor loadings first for an estimation using individual parties’ linkage scores as the numerical input of the analysis. Panel 4.2 runs the same analysis with countries’ average linkage scores as data input. Both party-level and polity-level factor analyses provide the same theoretically transparent, easily interpretable three-factor solutions. The **first and strongest factor** in both party and country estimations indeed involves **a trade-off between clientelism and pork (E3, E6) versus programmatism (CoSalDi_4)**, but with qualifications and extensions. Let us begin with the extensions. On factor 1, parties that engage in strong clientelistic linkage efforts and provide pork, but little programmatism, also tend to put more emphasis on the charisma of leadership personalities (E1), rely more on descriptive representation (E8), and — mildly — tend to cultivate more bonds to religious associations (A4_3). Overall, this puts them in a position to boost party identification as well (E4).

Next, the qualification. How closely are clientelism and programmatism mutually associated on the same factor? The factor loadings for clientelism related linkages (E3/clientelism and E6/pork) are very strong, but the negative association with programmatism is only moderately robust. So, there may be mechanisms at work that subvert a simple trade-off between clientelism and programmatism in many parties. Scatters below examine more closely the presence of parties that are highly invested in both clientelism and well as programmatism or, inversely, invested in neither.

Table 4: How Do the Various Linkage Mechanisms Hang Together (Factor Analyses)

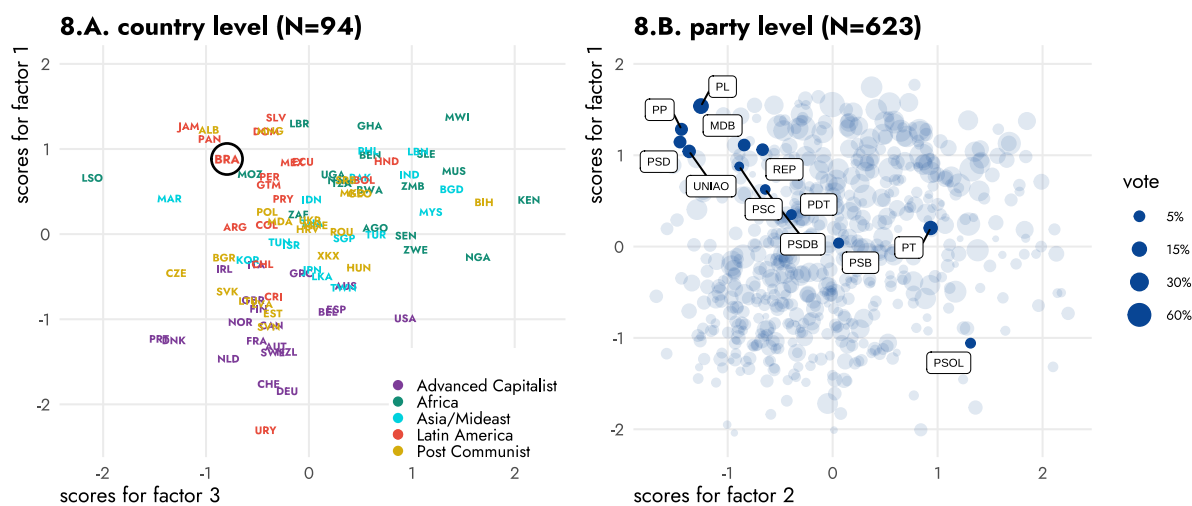
[illegible]

Focusing on the remaining factors two and three depicted in Tables 4.1 and 4.2, the second factor at the party level is a dimension of **group identification**. It loads strongly on ethnocultural group adherence (A4_4) and generic descriptive representation (E8) and weaker on party identification (E4) and pork provision (E6). It pits parties articulating particularistic against universalistic identities against one another. The third factor at the party level is one of **party valence strength**. Parties with high capacity to sustain party identification and a strong brand image of competence to govern the polity also tend to be more committed to constituency service (E7). At the inverse pole of this factor are parties lacking strong cultivation of party ID, reputation for effective capacity to govern, and constituency service. At the country level (Table 4.2), the very same factors appear, but in reverse order. Here, at the level of country aggregation, the group identification linkage dimension has slightly more power to discriminate among parties than parties' valence strength. But the variance explained by factors 2 and 3 differs little so that the order could almost be reversed, as is the case in the party-level factor analysis.

The clustering of linkage strategies may force research on linkage strategies to conceive linkage profiles as a three-dimensional phenomenon with politicians making choices over targeting of benefits and costs (dimension 1), mobilization of socio-cultural segments (dimension 2) and emphasizing valence qualities (dimension 3).

Figure 8 shows the location of countries on the strongest two factors, the clientelism/programmatism trade-off and the ethnocultural/descriptive representational linkages factor. For the party-level scattergram, the acronyms of parties in Brazil are inserted. But keep in mind that factor 1 absorbs only part of the raw programmatism score of each party's full linkage profile.

Figure 8: How Do the Clientelism/Programmatism Trade-Off Factor and the Ethnopolitical Identification Factor Distribute Across Democracies and across political parties in Brazil?



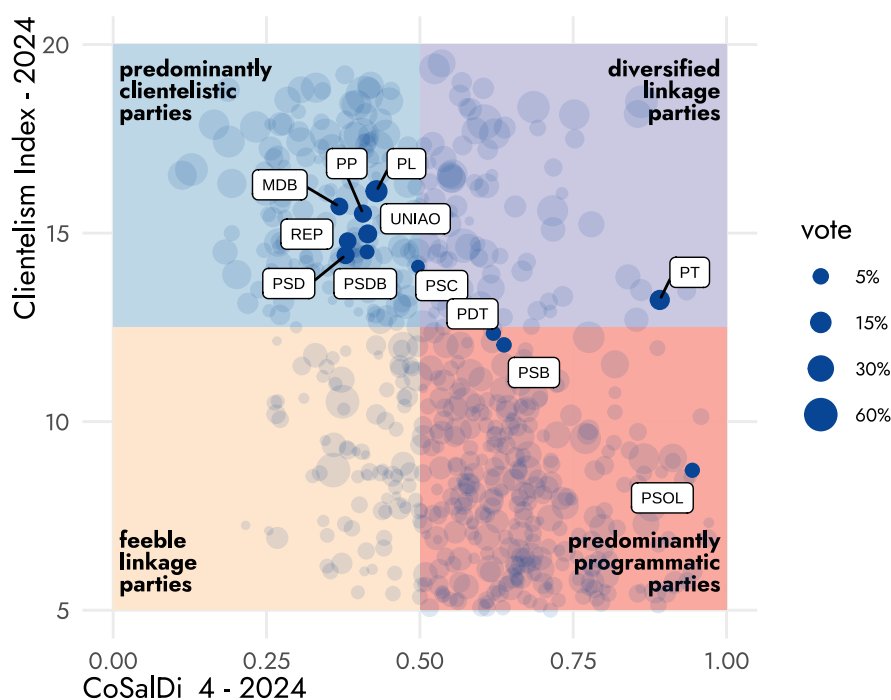
The country scattergram 8A shows that Brazil combines relatively high clientelistic-personalistic linkages (factor 1) with relatively low ethnopolitical appeals (factor 3). Disaggregated by parties (8B), it becomes evident that the group of parties seen as less programmatic is quite extreme in their high scores on factor 1 and low scores on factor 2, which explains the national average. At the opposite side are PT and PSOL, with relatively high scores on ethnopolitical appeals and relatively low scores on clientelistic-personalistic linkages. The main difference between the two lies in factor 1, as PSOL does not have a well-known and charismatic leader like PT has in Lula. PDT and PSB occupy a middle ground between the parties on the right and those on the left across both dimensions.

Keep in mind that the factor analysis investigating the clustering of linkage strategies operates with the key assumption that constructed factors are orthogonal to one another. But if there is no one-to-one correlation — or none at all — between two linkage strategies, the factor analysis is unlikely to capture the bivariate relationship between the two variables fully. In order to probe into that configuration of clientelism and programmatism more precisely, let us strip away other linkage mechanisms and turn to a scattergram of just the relationship between clientelism and programmatism at the party level (B15 and CoSaldi_4) based on DALP II data in Figure 9. For easier interpretation, let the distribution be divided into four color-coded quadrants.

The scatterplot of the party scores over these two linkage types certainly suggests that clientelism and programmatism are related. Many individual parties are configured along a diagonal running from high clientelism/low programmatism (the blue quadrant) to the opposite low clientelism/high programmatism endpoint (the red quadrant). But consider the heterogeneity of the subfields.

The yellow subfield of weak linkage parties, i.e. where parties appear to engage in very limited programmatic appeals, but also few clientelist linkage attempts, is only thinly populated, and mostly near its periphery interfacing with other combinations. Weak linkage parties are likely to be electorally small, either because they are young or on the way out. There are a lot more parties in the blue quadrant with predominantly and only feebly programmatic parties. This quadrant is mirrored by the red quadrant also frequented by many parties, assembling those with faint clientelist, but sharply crystallized programmatic linkages.

Figure 9: Just Clientelism and Programmatism: How Sharp is the Trade-off in Brazil? (2024 DALP II B15 X Cosaldi_4)



This leaves the fourth purple quadrant of **Diversified Linkage Parties (DLP)** that combine both powerful clientelistic mobilization with meaningful programmatic party position taking. This quadrant is more populated than the yellow weak linkage quadrant. So, there are many parties that do defy the conventional trade-off hypothesis between programmatism and clientelism. As we know from past preliminary analysis of DLPs, such parties tend to be among the electorally larger ones in many party systems and sometimes have in their genealogy a precursor party that may have operated as ruling party

in a past authoritarian regime. Closely examining DLPs therefore tends to be a vital objective of linkage analysis in contemporary party systems.

Plotting the Brazilian political parties into the clientelism X programmatism coordinates reveals that most of them fall in the high clientelism/low programmatism area. The picture is quite similar to Figure 8B, where parties are distributed along a similar diagonal. In Figure 8B, parties like PP, PL, and PSD fell in the quadrant of high clientelism and low ethno-political appeals, while PSOL and PT displayed the opposite characteristics. Now in Figure 9, we observe a similar pattern, although PSOL stands out more clearly as the only party offering a vigorous programmatic commitment, thus distancing itself from PT, which ends up in the quadrant of diversified linkage parties.

4 Party Organization: Baseline for Coordinated Partisan Accountability

Parties solve collective action problems by pooling resources and creating coordination to deploy them in attracting activists, choosing candidates and leaders, and issuing messages reaching out to voters in election campaigns and during spells in legislatures or executive office. If parties are programmatic, they also solve social choice problems in that they craft common policy positions publicly supported by all members, activists, and leaders in spite of each contributor to the joint effort likely to have individual policy preference schedules that diverge somewhat from the collectively agreed program.

Solving collective action and social choice problems is difficult and requires “organization.” Organization involves the creation of continuous lines of communication among contributors to the party that are structured in such ways that some actors receive, emit, control, and act on more information than others, and through defined channels of communication. Creating a web of communication typically involves division of labor and some hierarchy of control over the handling of information. Moreover, in order to communicate, financial resources are needed to set up and sustain communication networks and to fund those who spend their time on creating and handling information for the party. The communication web of a political party is therefore physically embodied in people who contribute their time to the organization without being financially compensated for it (members and “activists”), people who communicate party objectives while being paid for it (either in party or electoral and government executive offices, including functionaries, legislators, or party “leaders”), and costly physical infrastructure (offices and buildings, communication equipment, software) to sustain the coordination among those activists, functionaries, legislators, and leaders.

Party organizations may vary across several dimensions two of which are prominently featured in the DALP II survey. The first concerns the **“extensiveness” of the party organization**, referring to the scope of presence of a party in their electoral constituencies. The survey operationalizes this in terms of experts estimating a continuous presence of a party’s offices and paid staff in territorial base units as well as the maintenance of party ancillary organizations (youth, women, etc.) as well as social activities. Future surveys may rather add here parties’ social media presence and scope of social media participation in party communication by its activists. The extensiveness of party organization is particularly important to enable parties to recruit activists and screen them for representative office candidacy and leadership roles. It is also critical for parties’ outreach in election campaigns through physical encounters with voters or virtual communication.

The second dimension of organizational variance tapped in the DALP II survey has to do with the **centralization of party organization**, i.e. the extent to which a small circle of actors issues a party’s

authoritative communications to their activists, to competitors and to their electoral constituencies. How extensive is the circle of participants in crafting a party's authoritative communications, activities shaped by those communications, and selection of actors who generate and publicize such communications? In the DALP II survey, two operational questions attempt to track party centralization. One concerns the scope of what some political scientists would call the "selectorate" of party candidates for electoral office, i.e. the subset of actors who are involved in deciding whom the party presents to the voting public at large in competitive party democracies. The fewer actors are involved in candidate selection, the more centralized is a party organization. The other indicator concerns the control over financial resources in a party: Is control of most resources located in the localized base units of a party or at higher echelons of a party hierarchy, with the other extreme being a small body of party leaders assembled in an executive party organ?

One of the hitherto unanswered research questions concerns the extent to which the choice of parties' linkage profiles, as rendered in Figure 8 panels, is associated with different organizational shapes, characterized by the attributes of extensiveness and centralization, or others that may not be fully captured in the DALP II survey. This question is very hard to answer, because the shape of party organization may be affected by a whole range of additional factors that make it impossible to postulate a straight (and linear) connection between parties' linkage profiles and organizational shape. To highlight the complexity of the relationship, it may be useful simply to enumerate some of the main factors and mechanisms operating inside a polity existing research on party organizations has brought to bear on this question:

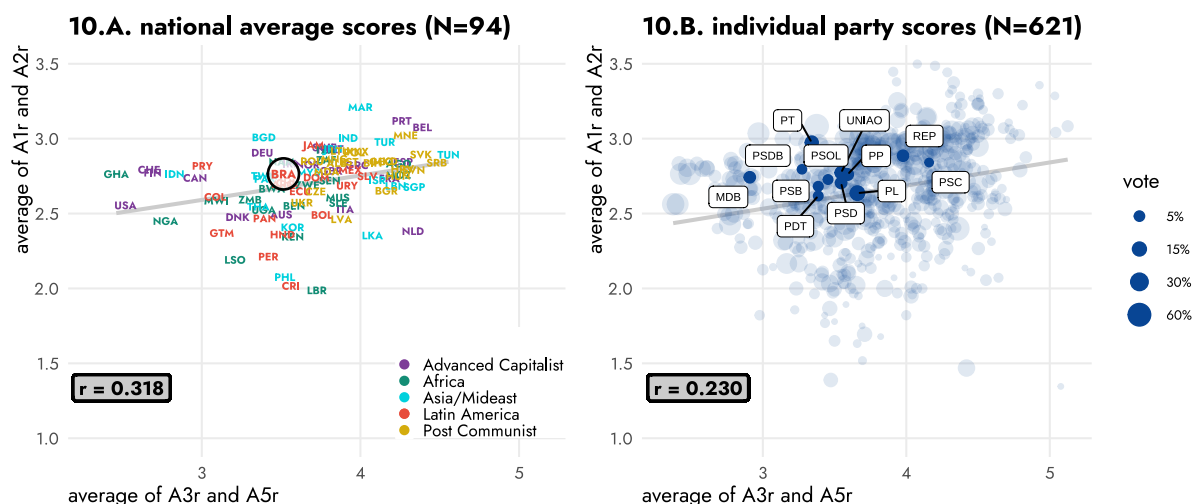
- ▷ The geographical and population size of the country;
- ▷ The political-economic circumstances in which parties operate (affluence of country/electoral constituency? Inequality of resource distribution? Economic interest associations?);
- ▷ The sociocultural setting in which parties operate (religion and churches? Socio-cultural networks?);
- ▷ The type of electoral system (district size, electoral formula, ballot structure);
- ▷ The degree of centralization or decentralization of political jurisdictions (subnational legislatures? federalism?);
- ▷ The age of parties and party system;
- ▷ The ideology of the party at the foundational moment and at later stages;
- ▷ The electoral size and success of a party.

For example, whether a party's highly extensive, centralized party organization is associated with a linkage profile skewed toward clientelism and personalism, and whether that combination will promote electoral success may very well depend on a country's level of economic development, its institutions (electoral system, decentralization) and the sociocultural setting. Sometimes clientelistic parties may be successful with this organizational shape, at other times not. Likewise, whether extensive decentralized mass parties with primarily programmatic appeal and strong party identification deliver electoral success may also depend on a range of variable contingencies.

For the descriptive overview of Brazil, let us therefore only report the basic parameters of party organization and display them in another scattergram. Consider the experts' assessments as very rough, as it is difficult to find precise empirical equivalents to anchor the judgments of organizational extensiveness and centralization across polities. It is already problematic to conceive of parties' base local

units as equivalents, as the meaning of this term may vary across countries based on subnational administrative divisions and sometimes even across parties. Nevertheless, with this proviso in mind, inspect the two scattergrams of Figure 10. On the vertical axis, greater scores mean broader extensiveness of party organization, i.e., more presence of parties on the ground across a territorial jurisdiction, plus more ancillary associations and social activities tied into their mobilization. On the horizontal axis, higher scores mean greater centralization of party authority, i.e. more concentration of party communication and decision-making in a party's top leadership, particularly of nomination of legislative party candidates and control of party financial resources.

Figure 10: Party Extensiveness and (De)centralization



At this point, before thorough investigation, let only a few general observations be floated. There are large differences in the average practices of organizing political parties across countries. Moreover, there is substantial variance among parties within the same polities. Consider the country with the greatest population and the most parties included in the DALP II dataset, India. The Indian parties come across as generally rather extensive, mostly located in the upper tier of the scattergrams 10B and on average moderately centralized in their internal governance. But this conceals considerable variance among individual Indian parties. The ruling Bharatiya Janata Party (BJP) is clearly the most extensive and centralized party, located in the upper right region of Panel 10B. Its largest competitor, the India National Congress (INC) Party, by contrast, is a bit less centralized and less extensive, situated closer to the center of the horizontal dimension, but still in the upper tier where most other Indian parties are situated as well. Yet the recently emerging New Delhi based middle-class anti-corruption Aam Aadmi Party distinguishes itself from all of its competitors by weaker organizational extensiveness, yet quite pronounced leadership centralization. Many of the regional parties in India by definition exhibit less national than state-level centralization and therefore exhibit only intermediate levels of centralization.

In Brazil, however, all political parties under analysis display similar levels of organizational extensiveness. Parties such as PDT and PL score slightly higher on this dimension, but not substantially so. From an international perspective, all are positioned in the mid-to-high range, placing Brazil alongside advanced capitalist countries on the vertical axis. In contrast, there is notable variation in the centralization dimension: PSC and REP score high even by international standards, while MDB is viewed by experts as having a more decentralized approach to party communication and decision-making.

These party-level data points on party organization and linkage strategies within electoral democracies do not reveal easily inductively visualized patterns of regularities and certainly not patterns that

would directly cohere and correlate with variance of linkage profiles across countries or political parties. What is clearly called for here is a theoretical elaboration that spells out hypothetical causal relations the correlational implications of which can be explored with DALP I and II data. Even for a purely correlational analysis, however, the challenge of accounting for party organization and its relation to linkage mechanisms is so complex that theory would require incorporation of a whole slew of empirical controls, including systemic features (country geographical size and population, political institutions, competitive configuration of the party system, political economic background conditions) as well as party-level features (such as age and origin of parties; party ideology and social constituency).

5 Conclusion — Analyzing Political Linkage Mechanisms in Competitive Party Systems: The Prospects

Brazil's party system exhibits a generally low level of programmatic structuring, with most parties ranking in the lower third globally — except for PT and PSOL, which stand out as programmatic outliers, particularly in 2022–24. Clientelism remains widespread, placing Brazil in the top third globally; conservative parties tend to combine spot-market and relational forms, while PT and PSOL rely more on long-term broker relations. Linkages based on personalism, charismatic leadership, and ethno-political appeals remain limited overall, though Lula's PT and Bolsonaro's PL are notable exceptions in terms of charisma. The growing influence of Evangelical voters has also contributed to a recently notable level of religious-based appeals.

PT and PSDB retain relatively high governing capacity due to their executive track records, while PL and PP are viewed as coalition-based parties with lower perceived competence. Party ID is uneven, with strong identification on the left (PT, PDT) and weak ties on the right (PL), contributing to asymmetrical institutionalization. Organizationally, Brazilian parties are relatively similar and score in the mid-to-high range on extensiveness, demonstrating a reasonable local presence. However, they vary widely in centralization, with right-wing religious parties (REP and PSC) showing high scores, while MDB scores lower on this dimension.

The data description provided in this overview is only a first step on the way toward a more fine-grained analysis of the association between partisan linkage patterns, party organization and institutional, political-economic, and cultural settings in which they operate. Identifying detailed correlational patterns is not equal to determining causation, but it is a definitive step in direction of earmarking topics that may be particularly relevant for causal analysis. Moreover, while correlation does not imply causation, the inverse is not true: Absence of correlation does very well mean that causation is absent for a hypothesized relationship. So, even a cross-sectional analysis — or an intertemporal analysis of DALP I and DALP II observations spanning a time period of 14–15 years, may cast doubt on some hypotheses about linkages popular in the political science literature.

A great deal of this analysis indeed needs to proceed at a disaggregate level, where the units of analysis are parties and their strategists, i.e. the focal decision-makers within competitive party systems. For example, investigations into parties' deployment of brokers in clientelistic transactions may need to examine parties' organizational capabilities and internal power structures, as well as specific competitive environments in which individual parties are embedded, in addition to the broader national characteristics of economic and social settings. So, for many analytical purposes, the birds-eye perspective of cross-national comparison may be informative, but only an intermediate step to a party-level analysis.

Given constraints of space and time for investigation, this initial descriptive dossier could only highlight party-level variance selectively.

A further complication in future research is that both theorizing and empirical analysis may ultimately not focus on individual linkage mechanisms and their distribution across parties and polities, but the combined “portfolios” or “profiles” of interdependent linkage mechanisms parties choose at any given time, as inductively rendered in the factor scores reported above (Table 4 and Figure 8).

Contingent on their competitors’ strategies, parties may assemble differing “profiles” of linkage mechanisms to compete for votes. How politicians bundle or dissociate linkage strategies may very much depend on the nature of the electoral constituencies (in socio-economic or ethno-cultural terms) to which they tailor their appeals, as well as the choices rival parties make in order to compete in the same elections and how all of these are conditioned by the institutional parameters which politicians observe in choosing their courses of action. But combinations of linkage strategies may not be arbitrary. For example, there may be many circumstances in which politicians deem it their optimal choice to combine an emphasis on targeted exchanges (clientelism, pork) with an appeal to leadership charisma and (affective?) party identification.

The purpose of this current “Country Dossier” memorandum, however, is a descriptive one to disclose basic patterns of linkage mechanisms observable in electoral democracies. Studying such empirical patterns may hopefully stimulate interest in more and novel research on political linkage mechanisms in electoral democracies. This memorandum raises questions but does not answer them. Scholars need to generate these answers with insightful research designs marshalling multiple data sources. The current DALP II project data may serve as one source of informational input feeding into such investigations and as catalyst to promote a proliferation of new insights.

Appendix: Introductory Bibliographic Essay on Partisan Linkage Mechanisms

The bibliography below introduces a few basic readings on linkage mechanisms in electoral politics, in lieu of extensive incorporation in the text of these country dossiers. The readings are sequenced in the order in which the linkages are discussed in the empirical section 3 of the dossier, starting with the “master linkage,” programmatic congruence between voters and citizens, then moving on to linkages that can be mobilized with comparatively low organizational transaction costs in the early history of electoral contests, such as personality/charismatic appeals and descriptive group identities, followed by non-programmatic linkages that require increasing time and effort on the part of political actors: accumulation of a positive valence record of governance, the organization of targeted exchanges between politicians and electoral constituencies (clientelism, pork, constituency service) and ultimately the construction and accumulation of affective partisan identification.

It is relatively easiest to indicate a few widely read generic sources on clientelistic party-voter linkages and think of pork provision as a diminutive form of targeted benefits with less specificity and (implicit) conditionality. It is already harder to generate basic readings on charismatic and programmatic partisan linkages because these are typically not discussed as generic partisan mobilization strategies, but with regard to specific substantive policy issues or personalities. Likewise, scholarship typically conceives of partisan identification not as something systematically nurtured/produced by political parties, but as a spontaneous behavioral result of habituation among party supporters and patterns of competition among the electoral contenders.

The final bibliographic section provides a few sources about linkages in the focal country of this dossier, Brazil.

1. Programmatic Linkage

Although much democratic theory takes programmatic party competition — understood as politicians bundling issue positions in complex configurations of “programs” — as the bedrock of democratic politics, there is surprisingly little theoretical thinking and empirical operationalization of the degree of “programmatisation” that parties and party systems display over individual issues or entire programs as issue bundles. We added here Carmines and Stimson’s (1989) classic analysis of how parties have folded new issues — racial politics, gender — into modified party competition. The bulk of empirical effort concerning programmatic partisan politics has been focused on measuring the candidates’ and parties’ “programmatic ideal points” either through expert surveys (see here: Benoit and Laver 2006; Jolly et al. 2022) or through text analysis of prime party documents, such as electoral manifestos, and debate the adequacy of these various empirical approaches (see Benoit and Laver 2007; Budge 2000). Luna et al. (2014) cast their net wider by including a range of ancillary strands of investigation into “programmatic” partisan politics, for example the nationalization of party appeals and internal party organization, as well as patterns of roll call voting in legislatures, but they do not get to the heart of the matter when it comes to the appraisal of linkages, i.e., the degree of “programmatisation” — in the sense of the degrees of distinctiveness and coherence of parties’ issue appeals that enable voters to make a programmatic choice among competing partisan offers. The most important source to theorize this core question is John Aldrich’s (1995, updated 2011) analytical and historical study of party formation in the United States. In many ways, the works by Kitschelt with a range of collaborators spell out considerations Aldrich was driving at, but in an operational way to make possible comparative quantitative research,

all the way to the most recent modification of the programmatism index variables based on DALP II data, as documented in Kitschelt and Yildirim (2024) and the present country dossiers. Krimmel (2024) provides an interesting extension and different empirical methodology of data generation based on partly automated text analysis to track the changing programmatism of American political parties. Magaloni et al. have presented one of the very few efforts to think about the combination or substitution of programmatism with other linkage strategies (clientelism) in existing investigations, something the current DALP II dossiers highlight descriptively by showing that quite a few parties and entire party systems are able to combine multiple linkage strategies — such as clientelism and programmatism — even though existing theorizing often sees a simple trade-off between them.

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- Benoit, Kenneth, and Michael Laver. 2006. *Party Policy in Modern Democracies*. London: Routledge.
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- Carmines, Edward G., and James A. Stimson. 1989. *Issue Evolution. Race and the Transformation of American Politics*. Princeton, N.J.: Princeton University Press.
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- Kitschelt, Herbert, and Kent Freeze. 2010. *Programmatic Party System Structuration: Developing and Comparing Cross-National and Cross-Party Measures with a New Global Data Set*. Duke University. https://sites.duke.edu/democracylinkage/files/2014/12/Kitschelt_Freeze.pdf
- Kitschelt, Herbert, Kirk Hawkins, Juan Pablo Luna, Guillermo Rosas, and Elizabeth Zechmeister. 2010. *Latin American Party Systems*. Cambridge: Cambridge University Press.
- Kitschelt, Herbert, Zdenka Mansfeldova, Radoslaw Markowski, and Gabor Toka. 1999. *Post-Communist Party Systems*. Cambridge: Cambridge University Press.
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- Krimmel, Katherine. 2024. *Divergent Democracy. How Policy Positions Came to Dominate Party Competition*. Princeton, N.J.: Princeton University Press.
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- Magaloni, Beatriz, Alberto Diaz-Cayeros, and Federico Estevez. 2007. “Clientelism and portfolio diversification: A model of electoral investment with applications to Mexico.” In: Herbert Kitschelt and Steven I. Wilkinson (eds). *Patrons, Clients and Policies: Patterns of Democratic Accountability and Political Competition*. Cambridge: Cambridge University Press, pp. 182–205.

2. Personalistic/Charismatic Linkage

The personal appeal of well-known public figures — emerging from the ranks of business, military, or cultural leadership, not necessarily the realm of partisan politics — often serves as a decisive starting point of party formation, as it may incur few upfront transaction costs to create a leading candidate's political profile and make people place high valence on a party based on its leader's credibility and track record in different walks of life. Initiated by Weber, this phenomenon has been captured under the diffuse notion of “charismatic” authority that is set up against institutionalized forms of social interchange. It may therefore be particularly salient in emerging parties, although charismatic appeals may also appear or reappear in the subsequent evolution of political parties. Charismatic politics has been studied only lightly, and with an emphasis on parties outside the Western established party systems. Conversely, there is an almost exclusively “Western” literature on the “personalization” of party politics — a phenomenon much broader than charismatic personal authority and also including institutional changes of individual political politicians' power and control (in parties, in cabinets) and media access, channels and presentation. Nevertheless, the theoretical problematic underlying the study of charismatic political authority and personalization may be often similar, namely the tension between institutionalization of parties (or in Rahat and Kenig's multiple indicators: “partyness”) and the leverage and discretion of individual politicians in democratic accountability relations.

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3. Descriptive Identity Linkage

An easy, uncomplicated way to resonate with voters that does not require much upfront investment in party organization and associational networks may be to demonstrate that a candidate — and the candidates of a party — share salient attributes with their intended electoral constituency. While these similarities may have an instrumental programmatic background subtly invoking common interests, they may be also and foremost of a striking symbolic and affective nature to establish a rapport between constituency and candidate that does not require a great deal of cerebral analytical spelling out. While this subject spills over into the narrower, and in the U.S. deeply studied phenomenon of party identification to which the bibliography returns below descriptive linkages based on shared attributes concern a much broader range of options that are available without all the partisan labor input needed to create party identification (see below). Most studied — and therefore not in this bibliography documented as it would explode it — are ethnic relations or representation, analyzing the extent to which the appeal of parties to ethnocultural identities succeeds and the consequences of such ethnocultural linkages for the elaboration of other political linkages (such as programmatic and clientelistic linkages) and for the output of authoritative decisions by a polity. This bibliography, by contrast, includes only a few investigations on the more general question on how descriptive representation may gain leverage and on specific attributes that have mattered beyond the familiar ethnocultural group divides, descriptive representation in democratic elections based on social class and gender. A critical question often concerns the extent to which descriptive appeals provide “net” electoral yield to political competitors, beyond substantive appeals to political programs or other linkage mechanisms. One text included here turns around the common causal direction of analysis — from invoking identities to partisan choice — and asks whether partisan choice and partisan identification and/or ideology structure what salient identities may be politically important for parties to feature (Egan 2020).

- Carnes, Nicholas, and Noam Lupu. 2016. “Do Voters Dislike Working-Class Candidates? Voter Biases and the Descriptive Underrepresentation of the Working Class.” *American Political Science Review*. Vol. 110, 4: 832–844.
- Desai, Zuheir, and Anderson Frey. 2023. “Can Descriptive Representation Help the Right Win Votes from the Poor? Evidence from Brazil.” *American Journal of Political Science*. Vol. 67, 3: 671–686.
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4. Valence Linkage (governability)

Starting with Stokes (1963) and powerfully advanced by Ian Budge, a broad trail of theorizing and empirical analysis has challenged the spatial theory of party competition and its main underlying linkage mechanism — programmatic politics based on spatial party positions. While the alternative also invokes parties' policy programs — categorized as "issues" — it brings in additional considerations that have to do with valence and salience. Parties are hypothesized to concentrate their efforts on specific issues to seek electoral followings, i.e. create salience of an issue appeal where they reckon to have a valence advantage in the sense that most voters attribute credibility to them and their capacity to act effectively on popular issue-specific policy demands on which voter preference distributions are concentrated near the party's ideal point. The interaction of a party's issue salience and credibility-valence advantage generates "issue ownership." Issue ownership is very important, for example, for parties' use of economic issues in political campaigns and has long been investigated under the terms of a distinct research trajectory — the study of economic voting where parties' performance to bring about what voters rate as "good" or "bad" economic results (in terms of employment, inflation, growth, mortgage interest rates, etc.) affects people's vote choice. Parties are judged based on their performance in political office, but, conversely, parties are also able to manipulate those judgments by creating their own narratives of how their actions relate to policy outcomes, thereby attributing particular salience to distinctive policy issues that give them credibility to pursue high valence strategies successfully. In the DALP II survey, for each policy issue on which parties' positions are scored, there are both positional and salience measures, albeit no "credibility" measure. But DALP II aspires to approximate a measure of whether parties can claim credibility for a range of political activities by including a term where experts score a party's reputation for having a "capacity to govern" effectively. This may be no perfect measure to get at a party's capacity to invoke credibility but is a construct that still approximates some aspects that issue ownership theories find wanting in programmatic linkage configured spatial theories of party competition. The bibliographic references here are sparse and focus on analytical presentation of the relevant theory of issue ownership competition between political parties.

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5. Clientelistic Linkage

A great deal of linkage research has focused on targeted, discretionary benefits — and at times imposition of costs and penalties — directed at individual voters or narrowly circumscribed groups. At least implicitly, the intent of politicians and their electoral agents (“brokers”) is to create a contingency between politicians’ and citizens’ actions, such that benefits or forbearance of costs by a politician trigger voters’ allegiance to and support of that politician — e.g., through voting and more involved forms of candidate assistance. In practice, establishment of such contingency is difficult, as monitoring and sanctioning of opportunistic defectors with heavy-handed methods is typically ruled out by electoral laws and other institutional safeguards. Nevertheless, clientelist exchange practices have thrived in many polities. Part of the literature documents how clientelist exchanges work (or fail to work) in many different guises, giving rise to typologies of clientelist linkage mechanisms, often mediated by brokers and party organization studied more recently in clientelism investigations. Another strand of the clientelism literature deals with the rise and decline of clientelist exchange as a significant form of electoral linkage in competitive democracies. It considers economic development, institutional arrangements of democracy (electoral laws, legislative-executive relations, etc.), the historical timing and maturity of democracies, or the ethnic divisions within democracies. A smaller literature focuses on the potential economic, political and cultural consequences of clientelism, for example, whether democratic linkage mechanisms dominated by clientelism influence economic performance, income or wealth inequality, political state capacity and members’ of societies’ sense of personal wellbeing or political regime support. The bibliographic recommendations here include a few classics (Scott 1972; Shefter 1977), numerous overview articles opening up broader access to the burgeoning literature on clientelism (Hicken 2011; Hicken and Nathans 2020; Kitschelt 2000; 2020; Kitschelt and Wilkinson 2007; Pellicer et al. 2020), as well as a few recent research articles and monographies that have commanded wide attention among scholars.

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6. Pork or Constituency Service Targeted Benefits

In addition to clientelism there are at least two other modes of distributive political accountability that targets more narrowly circumscribed constituencies, albeit even without the aspiration or pretense of contingency and reciprocity. One is "pork" politics, or the targeting of benefits (or avoidance of costs) on geographical or group-based constituencies. By promising and/or delivering pork, politicians (and parties) expect to increase their electoral chances through credit claiming for the group benefit. Pork politics often involves investments in physical infrastructure (water management, transport, communication) or social services (such as education or health facilities). Constituency service, by contrast, typically involves a politician's — and especially a legislator's — attention to the pleas and petitions of a constituency member for assistance, for example by facilitating administrative procedures or access to public policy benefits.

Outside the clientelism strand, there is a vibrant literature in political economy about the mobilization of special interests in electoral democracies that concerns rent-seeking of geographical, sectoral or cultural group interests. The literature on constituency service — as well as the empirical investigation of such practices — tends to be somewhat limited, in part because the phenomenon is in many not central to the democratic accountability relationship.

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7. Party Identification (Mobilization by Parties)

Most behavioral political scientists consider affective party identification to be the "unmoved mover," the bedrock commitment to a party that many citizens acquire through childhood socialization.

Well, that applies more in the U.S. two-party system than in multi-party systems. Moreover, even in the U.S., when looked at it from a macro-aggregate perspective, proportions of party identifications are changing. Even so, these considerations just concern the political demand side: citizens' political belief formation. But what about examining party identification from the partisan supply side: Do not parties actively shape political identifications as well? Organizational mechanisms are social and cultural organizations, subsidiary party sections (youth, women, special occupations, etc.), sites of communication (residential areas/partisan sorting of habitation, places of socializing: pubs, fairgrounds, sports events, etc.), festivities and historical commemorations, uniforms, caps, flags and songs and, lately, cyberspace social media websites, podcasts and influencers. Parties may benefit from, but also systematically build sociocultural ecosystems at the level of neighborhoods and social networks.

Interestingly, the Americanist party identification literature does not take these supply-side mechanisms of forming party identification into account. In the comparative literature on party formation, these mechanisms have been noted especially in the literature on working class party formation and other sociopolitical subcultures, for example Christian confessional communities (Catholicism versus Protestantism). In the current political science literature, the “active” supply-side element of party identification comes in primarily through two considerations only. The first one is a behavioral modification of spatial programmatic competition theory, namely that affective party identification gives politicians degrees of freedom in adjusting their programmatic spatial appeals that would be suboptimal if voters only responded to programmatic markers. The second strand of research where an active use of identification comes in is associated with the literature on party system polarization, namely that spatial programmatic issue polarization also spills over into affective party polarization (cf. Gidron et al., 2020; McCarty 2019).

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