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The Presidency of Evo Morales:
An Archetype of Latin American Populism?

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Abstract

On January 22, 2006, Evo Morales Ayma was inaugurated as the sixty fifth President of Bolivia and was the first indigenous man to hold the position. After holding the position for nearly fourteen years, Evo Morales was removed from office on November 10, 2019, following a slew of revolts that broke out across the country protesting his fourth consecutive presidential term. He was one of Latin America's longest serving presidents, and despite having lost a referendum which would have given him the authority to do so, he attempted to hold on to power for another term through an illiberal election. The case study of Evo Morales is a prime example of Latin American populism and through this example we can analyze the development of populism in the region. This dissertation will explore what populism is, how it can be identified in Latin America, and the evolution of Evo Morales' populism throughout the course of his presidencies.

Keywords: populism; Latin America; Bolivia; Evo Morales; ethnopopulism

Resumo

No 22 de Janeiro de 2006, Evo Morales Ayma foi empossado como o sexagésimo quinto presidente da Bolívia e foi o primeiro indígena a ocupar o cargo. Depois de quase catorze anos, Evo Morales foi destituído no dia 10 de novembro de 2019, após uma série de revoltas que eclodiram em todo o país em protesto por seu quarto mandato presidencial consecutivo. Ele teve uma das presidências mais longas da América Latina e, apesar de ter perdido um referendo que lhe daria autoridade para fazê-lo, tentou manter o poder por mais um mandato por meio de uma eleição iliberal. O caso de Evo Morales é um exemplo do populismo latino-americano e por meio dele podemos analisar o desenvolvimento do populismo na região. Esta dissertação explorará o que é populismo, como pode ser identificado na América Latina, e a evolução do populismo de Evo Morales ao longo de sua gestão.

Palavras-chave: populismo; América Latina; Bolívia; Evo Morales; etnopopulismo

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Introduction

On January 22, 2006, Evo Morales Ayma was inaugurated as the sixty fifth President of Bolivia and was the first indigenous man to hold the position. When he won the 2005 election, Morales first addressed the nation from the agricultural city of Cochabamba, adorned in coca leaves and surrounded by people waving the Bolivian national flag and the colorful *wiphala*, the flag representing indigenous resistance. This scene became a visual portrayal of what Evo Morales claimed his presidency would represent: a plurinational state where all Bolivians would feel empowered. After holding the position for nearly fourteen years, Evo Morales was removed from office on November 10, 2019, following a slew of revolts that broke out across the country protesting his fourth consecutive presidential term. He was one of Latin America's longest serving presidents, and despite having lost a referendum giving him the authority to do so, he attempted to hold on to power for another term through an illiberal election.

The case study of Evo Morales is a prime example of Latin American populism and through this example we are able to analyze the development of populism in the region. By using ethnopopulist tactics as his thin ideology to mobilize the indigenous Bolivians and an inclusionary Marxist campaign as his thick ideology to appeal to the masses, Morales secured enough support to gradually dominate executive power. Populism was the strategic tool Morales utilized to illiberally hoard sovereignty until he was forcibly removed from office by the people. This dissertation will explore what populism is, how it can be identified in Latin America, and analyze the evolution of Evo Morales' populism throughout the course of his presidencies.

I. Research Question

Determine whether Evo Morales can be characterized as a Latin American populist and analyze his form of populist leadership.

II. State of Art

There is significant and extensive research done on populism and many scholars have applied their findings to the case of Latin America, as I will do as well. The purpose of this dissertation, however, is to analyze whether it is possible to distinguish between populism as a general movement and dynamic, and populism as a form of leadership, using the specific case of Evo Morales in Bolivia. The works listed in the bibliography will all play an important role in investigating and hopefully arriving at a conclusion about Morales' use of ethnopopulism.

The dissertation will be divided into three distinct segments; first, a clear definition of populism; second, populism in Latin America; and finally, the case study of Bolivia under Evo Morales. The first section of the dissertation will establish a definition of populism and explain it as a “thin centered ideology”. I will be comparing the works of several authors to establish a well-rounded understanding of populism, including the publications of Jan-Werner Muller (2017), Ernesto Laclau (2005) and Benjamin De Cleen (2017), but the work of Cas Mudde will be the intrinsic groundwork for the definition of populism in this dissertation. Mudde has written a plethora of publications on populism, and his book *Populism: A Short Introduction* (2017) will serve as the principal reference because there seems to be a strong consensus that it is the most successful and useful analysis on the subject thus far. The multitude of books and studies previously done on populism gives a clear definition and a good explanation of the difference between the concept in different countries and continents,

and a comparison of these works will establish a good foundation to build on.

Aside from a general summarization of populism in most basic terms, I must also establish what specifically characterizes Latin American populism. Mudde's publication *Voice of the people: Populism in Europe and America compared* (2011) will serve as an important reference to clearly differentiate between the populist movements in Europe versus Latin America. The work of Carlos De la Torre will also be useful in framing populism in Latin America. His essay "In the Name of the People" (2013) focusses specifically on the case studies of Venezuela, Bolivia and Ecuador, and I will use a similar methodology in my dissertation to define populism via case study examples.

I will apply the definition of populism explained in the first section of the dissertation to Latin American examples, briefly looking at Argentina, Peru, and Venezuela to provide some conceptualization. This will show how populism has evolved in Latin America over the last century and has had an impact on nearly every country in the region. Dong Jingsheng (2018) divides periods of populist rule in Latin America into four different eras with examples of leaders from different countries that can be used to define these periods. This is a useful reference, but I am more inclined to use the analysis of populist evolution presented by Sebastian Edwards (2019) which divides Latin American populism into two distinct groups: classical versus new. The arguments presented by both authors will be used to better conceptualize populism in the region and how populism is not a "one size fits all" theory; it comes in waves and looks different depending on several factors. This will then allow for the transition to the main case study to be evaluated: Bolivia under former President Evo Morales.

The final section of the dissertation will analyze the specific case of Bolivia and Evo Morales. First I will briefly discuss Bolivia's political history, from imperialism, to independence, to the Chaco Wars, and revolutionary movements of the 50s and 60s. Herbert

Klein's book *A concise history of Bolivia* (2011) and Waltraud Morales' book *A Brief History of Bolivia* (2003), will provide the necessary historical conceptualization, and then I will use the works of Assies (2005), Dove (2015) and Muñoz Pogossian (2008) to introduce the political history and evolution of Bolivia. By first analyzing Bolivia's political transformation and evolution from a historical viewpoint, I will formulate the necessary backdrop to better understand how Evo Morales was able to quickly rise to power and gain so much support, especially from the indigenous and mestizo communities.

I will also give an overview of the Bolivian political system, using the nation's Constitution as my key reference, and briefly explain the different bodies of government. Harten's book *The rise of Evo Morales and the MAS* (2013) will serve as an important reference to analyze the accession of Evo Morales and MAS in Bolivia and why they were so successful. It discusses the organizational structure of MAS, how Evo Morales climbed through the ranks and how he used the indigenous and grass-roots ideology of MAS during his presidency. This book provides a cultural and structural explanation of Morales' presidency and it will be very useful when analyzing why the indigenous and mestizo communities trust and support the MAS party so vigorously.

Once the historical and structural foundation is established, I will use a number of books and articles written about Morales' use of ethnic politics and combine that with the information previously presented about populism, and specifically Latin American populism, to analyze the traits that characterize Morales' politics throughout the past two decades and examine his ethnopopulist tendencies. Brien's essay "A populism of indignities: Bolivia populism under Evo Morales" (2016) analyzes Morales' ascent and how his success is so closely tied to Bolivian nationalism and the populist ideology that economic and political instability is the fault of the elitist liberal government leaders and their support of foreign

control of Bolivia's natural resources. This paper, along with Andreucci's "Populism, hegemony and the politics of natural resource extraction in Evo Morales's Bolivia" (2018), discuss the important role that Bolivia's natural resources have on Bolivia politics, especially for the indigenous communities. These works will help analyze why Morales had so much success among these communities, which will allow me to evaluate whether his success is the product of populist political tactics or something else. News and journal articles from a variety of sources, included but not limited to *The New York Times*, *The Atlantic*, *Foreign Affairs*, and *World Politics Review*, discussing Morales' presidency and his eventual downfall will also serve to analyze the course of his rule and his developing populism.

I will also include a number of primary sources, most importantly the Bolivian Constitution of 2009, and direct quotes from Evo Morales throughout his terms in office. The direct quotes are collected from a variety of sources, including his presidential campaigns, his speeches, Twitter, and a documentary entitled *Cocolero*, which follows Morales throughout his campaign. The Morales quotes will serve as testaments to his populist discourse, and they will be useful examples in my analysis. I will also present data from a variety of sources, such as voting data from the *Órgano Electoral Plurinacional* (OEP), which is Bolivia's electoral branch, and economic data regarding the evolution of Bolivia's economy from the International Monetary Fund (IMF). Reports from HumanRightsWatch, Freedom House, The Organization of American States, and World Justice Project's Rule of Law Index will be used to analyze democracy in Bolivia after Evo Morales and demonstrate the impact of populism on democracy.

III. Objectives

Populism is a complex term in political science used to describe different political trends in varying circumstances. Often defined as a “thin-centered ideology” that is always combined with a host dogma, while the doctrine in which it attaches itself may differ, there are several standard identifiers that can characterize populism. Populist leaders separate a society into two homogenous groups, the “pure people ” versus the “corrupt elites”, and the populist will always claim to be the only true representative of the people in an unjust system. In Latin America the term is generally used to characterize left-leaning leaders, as opposed to the use of the term in Europe to define extreme conservatism. Classic examples of Latin American populism include Argentina under Perón, Peru under Fujimori’s ethnopopulist neoliberal presidency, or Venezuela under Chavez’ extreme socialist regime, but the case of Bolivia under Evo Morales is not so conclusive.

This dissertation will look at Morales’ political stratagem and analyze whether he can be characterized as a populist leader based on the accepted theory and definition of populism. While there are clear examples that could indicate paradigm populist tendencies, there is also much evidence from his nearly fourteen-year presidency that could argue Morales is no more than a genuine leader who stood for his people. Is it possible, then, for a leader to exhibit populist proclivities without being classified as such? The principal objective is to determine whether or not Evo Morales can be characterized as a Latin American populist and analyze his form of populist leadership.

IV. Methodology

This dissertation will be written following the Chicago Manuel of Style and a comparative analysis methodology will be used to investigate the topic and establish a conclusion. By

comparing different works analyzing populism already published by scholars, we will be able to present a clear definition of populism and evaluate whether that definition can be applied to the case of Evo Morales. Populism is not a simple ideology, rather an ideological approach that must latch itself on to a dogma (conservatism, socialism, liberalism, etc.). Cas Mudde's (2017) definition of populism as a "thin centered ideology" is the dominant theoretical paradigm for the term and it is generally accepted by many scholars that write about populist theory. With that being said, Mudde's work is not the only research done on the topic and this dissertation must also compare his work to that of other scholars to present a well-rounded analysis.

When discussing Latin American populist trends, I will briefly evaluate a number of examples from the region and compare the similarities and differences. A comprehensive synopsis of these different cases will generate an essential understanding of what identifies Latin American populism specifically, rather than the general definition presented in the previous section; the dissertation will become more specific as it develops. Considering the main argument of this thesis will focus on the case study of Bolivia under Morales, the examples given in this section will be brief and used for comparative purposes only. I will introduce the cases of Venezuela under Hugo Chavez, Peru under Alberto Fujimori, and Argentina under Juan Perón as three different instances that contribute to the conceptualization of populism in the region. While these examples are very different in many aspects, they are all examples of the evolution of Latin American populism and each case has certain similarities with Morales' Bolivia.

Once the foundation is clearly established explaining what populism is and what it looks like in Latin America, I will present the case of Evo Morales in Bolivia. After a detailed introduction of Bolivia, the MAS party and Evo Morales, I will begin to analyze his rise to power and presidency by comparing the facts to the populist theory. The dissertation will look at Morales' political strategy and analyze whether or not he can be characterized as a populist leader

based on the accepted theory and definition of populism. I will evaluate MAS' use of social movements to mobilize the people, especially in the indigenous communities and the rural coca farming regions, and the impact these movements had on Morales' political stratagem. I will analyze Morales' use of ethnopopulist tactics and anti-neoliberal and resource nationalism campaign strategies to gain the trust of the Bolivian public. I will also analyze institutional examples of Morales' possible populism, including the redistribution of natural resources to certain sectors of Bolivian society, the use of referendums and the introduction of a new Constitution in 2009. It is also important to look at the tumultuous end of Morales' presidency, which ended with his resignation and the unprecedented win of his successor, Luis Arce of the MAS party. After analyzing all of this information and comparing it to populist theory I will reach a conclusion.

V. Dissertation Structure

As previously mentioned, the first section of this dissertation will be dedicated to defining populism and presenting a number of scholarly arguments that best explain it. Populism is an ideology that is always combined with a host dogma. While the doctrine in which it attaches itself may differ, there are several standard identifiers that can characterize populism. Populists are usually charismatic leaders who claim to be the defenders of the "pure people" against the "corrupt elite". The factors that categorize these groups can vary, be they economic, cultural or regional determinants, but the essence of populism lies in the separation of the two groups. The populist leader will paint a picture of two homogenous bodies that are at odds, and only he or she is prepared to take on the corrupt "other". It is important to clarify that while populism commonly holds a negative connotation, there is nothing inherently negative about the ideology itself nor will I be condoning or condemning it or the leaders it may encompass.

In Latin America, populism has generally been attached to left-wing liberal or socialist doctrines. We see the evolution of Latin American populism throughout the twentieth and twenty-first centuries with examples in multiple countries across the continent. Of course not every instance of populism in Latin America follows the left-wing tradition that broadly characterizes the region, but for the purpose of this dissertation I will not go into great detail to describe these cases. Instead, I will describe the evolution of populism in Latin America, separating the trends into two distinct waves that can be further broken down into sub-waves: “classic” versus “new” populism. Different authors have their own characterizations on the development of Latin American populism (Mudde, Jingsheg, Edwards), and I will use their works as supporting studies for my own conclusions.

Classic Latin American populism describes the liberal and neoliberal leadership of Juan Perón of Argentina in the 1940s and 50s, and that of Alberto Fujimori of Peru in the late 1980s. New Latin American populism refers to the socialist and leftist trends that characterize the twenty-first century, especially the presidency of Hugo Chavez of Venezuela, and is very against the neoliberal policies of the formerly described wave. I will explain what distinguishes these two waves of populism, and once a clear understanding of the populist trends in Latin America is established, I will present the case of Evo Morales in Bolivia, who could arguably fall into the latter category of “new” populists.

Evo Morales, leader of the party Movimiento al Socialismo (MAS), served as president of Bolivia for nearly fourteen years, resigning in November of 2019 amidst allegations of political manipulation which resulted in a number of violent protests. Morales is a member of the Aymara indigenous group and became the first Indigenous president of Bolivia in 2006, a great feat for the country with the greatest percentage of indigenous peoples in Latin America. His politics seems to fit the text-book definition of populism: he stood alongside the indigenous and mestizo

communities of Bolivia against the corrupt and imperialist elite that had silenced the majority for centuries. As an Aymara Indian, Morales understood the importance of natural resources like coca to the indigenous communities and knew that by emphasizing his own experience as an agricultural worker and establishing a cultural connection to the Bolivian masses, he could gain their support. Morales and the MAS party were able to split Bolivia into two homogenous groups that were essentially against each other, and by successful mobilization tactics entrenched in grassroots organizations, they successfully gained power.

Morales then began to implement laws that benefited the indigenous and mestizo people which he felt had been left out of power, most notably by changing the Bolivian Constitution in 2009 to focus more on indigenous culture and representation. Strong, centralized power grew as Morales' presidency evolved, and the populist tendencies began to develop rapidly. In accordance with the characterization of populism presented by Cas Mudde, Morales exhibits many of the proclivities of a classic populist leader. He and his party divide the Bolivian public into two separate homogeneous groups; the "pure people" are the indigenous and mestizo communities who have suffered at the hands of the "elite" imperialists and foreign governments. During his campaign, Morales claimed that the Bolivian people were victims of foreign imperialist powers who still sought to take advantage of them and their rich natural resources as they have done for centuries. As an indigenous person himself from a very humble background and a history of involvement in grassroots organizations, like farmers unions and the MAS party, he would serve as a trusted representative of the "true" Bolivian people.

This technique, where a leader uses his ethnicity to authenticate himself and prove his connection to the people, is referred to as "ethnopoliticism" by Mudde. This dissertation will look at the term "ethnopoliticism" and analyze how and if it can be used to characterize Evo Morales' thirteen years as president. I will give a thorough explanation of the term and compare that to

Morales' presidency to demonstrate the connection. Examples aside from his personal cultural connection, include the changing of the Bolivian Constitution, the implementation of new laws and the longevity of his presidency will be analyzed and compared to the actions of populist leaders Chavez and Fujimori. I will evaluate the similarities and differences between the other Latin American examples and the case of Morales and assess whether or not the results are sufficient enough evidence to argue Morales can be characterized a populist.

It will be very important to analyze not only Morales' presidency, but how it ended and the succession of another MAS presidency. When Morales resigned due to corruption allegations, questions arose about what Bolivia's political future would look like. The opposition party demanded a recount to the election of 2019, and violent protests broke out across Bolivia. Naturally, it was expected that the opposition would win after Morales was forced to resign amidst scandalous protests, but to the surprise of many, the MAS party won the 2020 election again in a landslide. Luis Arce's victory could represent one of two things: either Evo Morales really did represent the Bolivian people and encouraged their political confidence in his party, or the Morales era of ethnopopulism is not yet over for Bolivia and MAS' power will continue to grow into a political monopoly.

The comparative analysis done over the course of this dissertation will allow me to arrive at a conclusion to the main question of whether or not Evo Morales can be characterized as a populist Latin American leader.

Chapter 1

What is Populism?

1.1 Defining Populism

Before delving into the analysis of Evo Morales' possible populism, it is necessary to first define theoretically what populism is and why the concept has caused such debate over the last century. As ironic as it may be, perhaps the most efficient way to begin defining populism is to determine what it is *not* to better clarify what it is. One of the most common misconceptions about populism, and simultaneously one of its most important characteristics, is that populism is not a central or thick ideology. Cas Mudde famously defines populism as a “thin centered ideology that considers society to be ultimately separated into two homogenous and antagonistic camps, ‘the pure people’ versus ‘the corrupt elite’”¹.

As a “thin-centered ideology”, populism must always be combined with a host dogma. The term populism in and of itself cannot describe an ideology because unlike classic political ideologies- such as liberalism or conservatism- populism cannot be classified into the traditional left/right dichotomy.² This is because while central left/right ideologies involve “a holistic view of how politics, the economy and society as a whole should be ordered”, and populism does not; rather it “calls for kicking out the political establishment, but doesn’t specify what should replace it.”³ A populist leader utilizes any doctrine that fits their discourse, and combines that doctrine with an anti-system campaign, in order to gain power and support for their movement.

¹ Cas Mudde and Cristóbal Rovira Kaltwasser, *Populism: A very short introduction*. (Oxford University Press, 2017), 6

² Ernesto Laclau, *On populist reason*. (Verso, 2005), 4

³ Uri Friedman, “What Is a Populist?,” *The Atlantic*, February 17, 2017,

<https://www.theatlantic.com/international/archive/2017/02/what-is-populist-trump/516525/>

In this case, populism cannot be compared to other ideologies, such as communism or liberalism, but rather it can attach itself to these theories. The traditional ideologies are the substance or essence of the movement, but populism is the framing and tool combined with it to deliver the message and expand it. It may seem nonsensical or impossible that one blanket term can be used to describe such contradicting politics, but the term “populism” is not used to describe the politics themselves; rather it refers to the process in which a leader or political party is able to attain these political goals. It is a dimension of the political culture that is present in these ideological movements.⁴ Populism is neither an ideology nor a rhetoric, rather it falls somewhere in between.

1.2 The People vs. The Elite

While the doctrine in which it attaches itself may differ, there are a number of standard identifiers that can characterize populism. Ironic as it may be, the unifying factor behind populism’s success is division and antagonism.⁵ Populists will divide the society into two homogenous groups that are so (ideologically) different, the distinction is impossible to ignore. The partition of the population into two distinct homogenous groups that are at odds with each other is perhaps the most important element of populism. The society is divided into “pure people” against the “corrupt elite”, and it is the ultimate objective of the populist leader to expose the elite and level the political playing field. “Populists pit the pure, innocent, always hardworking people against a corrupt elite who do not really work (other than to further their self-

⁴ Peter Worsley, "The concept of populism," in *Populism: Its meanings and national characteristics*, ed. by Ghita Ionescu and Ernest Gellner (London: Weidenfeld & Nicolson, 1969), 245

⁵ Bram Spruyt, Gil Keppens, and Filip Van Droogenbroeck, "Who supports populism and what attracts people to it?," *Political Research Quarterly* 69, no. 2 (2016), 337

interest).”⁶ The populist leader will paint a picture of two distinct bodies at odds, and only he or she is prepared to take on the corrupt “other”.

The factors that categorize these groups can vary on a case-by-case basis, be they economic, cultural, or regional determinants. While a populist leader in Europe may define the “pure people” vs. the “corrupt elite” along exclusionary identity-based guidelines, in Latin America the same categorization can be utilized to describe completely different groups.⁷ The essence of populism lies not in what characterizes these factions, but rather in the separation itself of the two groups. At a basic level, according to populist discourse, the “pure people” is a large powerless group being taken advantage of by the smaller and illegitimately powerful “corrupt elite” group.⁸ The “pure people” is one, homogenous, plebian class being exploited by the powerful.⁹ The “pure people” will always be portrayed as the sovereign people who feel they are not being accurately represented by the society’s elites. These people are described as the “nation” by the populist leader; they are the essence of the country and their rights have been stripped from them. They are the hardworking endemic people of a nation, which is the complete antithesis of the lazy and corrupt elites in power.

The populist will play on the vulnerability of the peoples’ struggle and charismatically convince them that he or she is the only one who can give the government back to the people.¹⁰ By convincing the people that the leader is “on their side”, they are simultaneously establishing a concept of society being divided into two sides. The population is divided into “good” and “bad” people, and the leader will always support the interests of the hardworking “pure” group.

⁶ Müller, *What is Populism?*, 44

⁷ Cas Mudde, and Cristóbal Rovira Kaltwasser. *Voices of the peoples: Populism in Europe and Latin America compared*, (Helen Kellogg Institute for International Studies, 2011), 10

⁸ Benjamin De Cleen, "Populism and nationalism," *The Oxford handbook of populism* (2017), 5

⁹ Laclau, *On populist reason*, 18

¹⁰ Mudde, *Populism: A very short introduction*, 43

Generally, people who are more vulnerable (economically, culturally, socially, etc.) are expected to have a higher tendency to support populism.¹¹ According to Spruyt, Keppens and Van Droogenbroeck, this can be explained for the following reasons: they may feel overlooked by the government in power, or anxious by a lack of jobs resulting in a lower-than-expected economic status. The “losers of globalization” theory is very relevant to the success of populism in economically developed countries.¹²

The “losers of globalization” theory refers to the unexpected number of individuals who have suffered significant losses during the globalization era, especially low-skill workers in western developed economies. The movement of jobs overseas causing international competition for limited manufacturing work, a gradual increase in computer automation and low or stagnant economic growth in the Global North has produced more “losers” than was expected, and the near future does not look overly optimistic for workers in the developing economies either.¹³ Populists take advantage of the exposed fears of people trying to cope with an ever-changing world and seemingly provide a culprit and an easy answer. The “elite” is clearly to blame, and the populist leader and their message is the only solution.

As one can expect, the “elite” is portrayed to be everything opposite of the “pure” people. Just as the people can be defined under sociocultural or socioeconomic terms, so can its rival group. The elite is usually classified as a smaller oligarchic group that rules over the majority. This group may be economically superior, as is usually the case in most Latin American or Asian countries, or they may be classified via socio-cultural standards, as is the case in Europe. The key distinction between the “elites” and the “pure people” is not necessarily the sociocultural or

¹¹ Spruyt, Keppens, and Van Droogenbroeck, "Who supports populism and what attracts people to it?," 337

¹² Ibid., 337

¹³ Nicholas Lamp, "How Should we think about the winners and losers from globalization? Three narratives and their implications for the redesign of international economic agreements," *European Journal of International Law* 30, no. 4 (2019), 1366-1367

socioeconomic criteria used to define the groups, however. According to populist discourse, the true discrepancy lies in the moral difference between the groups. The elites are not inherently corrupt due to their privileged position in society, but rather for their blatant disregard for the rights of the “pure people”.

For example, in most right-wing European populist rhetoric, the “elite” class is usually defined as the politicians in power who continuously pass legislation in favor of more European integration and support relatively open-border policies allowing for eastern immigration. The European populists utilize a nativist discourse and claim that these progressive policies indulge “outsiders” while simultaneously abusing the rights of their own “pure” and “native” people.¹⁴ The Latin American populist doctrine characterizes the “elites” by different criteria, but although the specific details may differ on a case-to-case basis, the message is always the same. The elites are morally corrupt aristocrats who value their own reputation over the interest of the endemic peoples they are supposedly meant to represent.

The populists will paint this polarizing picture of two distinct groups at odds, and the only way for the pure people to overcome this gross injustice is by revolting against the elites and level the playing field. This is a dangerous concept, because as the populist divides the society, he simultaneously breaks down the political system, which results in more serious consequences down the line.

The construction of enemies polarizes society into two poles, builds strong identities of ‘us against them’, and blames others for the failures of the leader. Acting on what they perceive as the ‘true’ interests of the people, these leaders selectively disregard the rule of law, the separation of powers, and the institutional arrangements that guarantee for pluralism and accountability.¹⁵

¹⁴ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 17

¹⁵ Carlos De la Torre, "In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador," *European Review of Latin American and Caribbean Studies/Revista Europea de Estudios Latinoamericanos y del Caribe*, (2013), 43

It is important to note that populism is not inherently anti-establishment, rather it seeks to change who benefits from the system and to make the system more just. The goal is not necessarily to eradicate the elite, but to replace or correct the system that favors them over the pure people.¹⁶ Equality for the majority is the main objective, but the problem is *how* to go about this systematic change.

1.3 What Characterizes a Populist?

For the mere possibility of equality between the groups to be attained, the pure people must gain more power and representation. This is where the populist leader comes in. A populist movement is only as successful as its leader because the attractiveness of the leader is the essence of populism. They are the face of the campaign, so the prosperity of the movement lies with them. Populist leaders always portray themselves as savior-like figures leading a movement in the name of the people.¹⁷ These individuals are usually men, though not always¹⁸, and they tend to have a strong, charming personality. Mudde refers to these leaders as “charismatic strongmen”, characterized by their strong and independent personality¹⁹. The leader must be attractive to the group he or she is trying to influence in order to gain power. The power of persuasion is key for

¹⁶ De Cleen, "Populism and nationalism", 15

¹⁷ Mudde, *Populism: A very short introduction*, 68

¹⁸ Populist leaders have traditionally been men, but the rise of populist female leaders has become increasingly common. Marine Le Pen, daughter of infamous French right-wing populist Jean-Marie Le Pen, is undoubtedly one of the best examples. The National Front has seen significantly more success under the leadership of Marine, and it is very likely that the party will continue to gain supporters as polarizing issues like the refugee crisis continue in Europe. Her genius truly lies in her ability to combine the art of femininity to attract constituents with a masculine demeanor to demonstrate her strong leadership. “Whereas other female political leaders are punished electorally if they are seen as too masculine, or as too sexual, Marine Le Pen as a rightwing populist is rather adored by supporters for her extraordinary ability to be a sexual and caring woman, and a virile masculine figure at the same time.” (Source: Dorit Geva, “Marine Le Pen's Goosebump Politics,” openDemocracy, 2019, <https://www.opendemocracy.net/en/rethinking-populism/marine-le-pens-goosebump-politics/>)

¹⁹ Mudde., *Populism: A very short introduction*, 63-67

the success of a populist; if they can convince the right people that they are on their side, the rest will fall into place.

The example of Donald Trump's triumph in American politics is the epitome of what a populist can achieve if persuasive enough. At first glance, it seems unrealistic that a billionaire businessman and television personality could win a presidential election with the claim that he is a representative of the average hard-working American. Trump is the epitome of the American elite, and yet in a very short time he was able to polarize a country and gain the support of the traditionally blue-collar low-income conservative population. The answer as to how he did this is simple; he is a charismatic and persuasive populist. Populist leaders will masterfully twist their discourse to appease the people and benefit themselves by focusing on moral identifiers, not socio-cultural or economic ones.

The moral dimension of populism is what allows leaders like Trump, who is clearly not a commoner, to come across as the "voice of the people"; Trump claims that, while he may be of a different socio-economic status as his constituents, what really matters is that his values are the same as theirs, meaning he represents the beliefs of the "pure people".²⁰ It may be obvious to their supporters that they are members of the elite, but what matters is that they promise to represent the pure people, *and only* the pure people.²¹ Müller writes, "they know that they are part of the elite, and so do their supporters; what matters is their promise that as a proper elite, they will not betray the people's trust and will faithfully execute the people's unambiguously articulated political agenda."²² So long as a populist can prove his or her dedication to the people and has a clear polarizing political agenda that favors the "silent majority", the people will follow faithfully.

²⁰ Friedman, "What Is a Populist?"

²¹ Jan- Werner Müller, *What Is Populism?* (London: Penguin Books Ltd, 2017), 54

²² *Ibid.*, 54

Symbolism is another critical tool used by populists to gain the peoples' trust. They will often adopt cultural elements to unify the people and establish a clear difference between them and the "others" that the populist looks to rebel against.²³ Religion, nationalist symbolism or propaganda, cultural traditions, language, and history can all be utilized by populists to attract supporters. Cultural relics are symbolic of the grandeur of a people, or a nation and they can be easily manipulated to appeal to the emotions of the people. While a flag may be no more than an image, to the people it represents it is an emblem of their independence.

For example, Evo Morales, the first indigenous Bolivian president, always proudly displayed both the Bolivian national flag and the *wiphala*, the flag representing indigenous resistance and holds significant cultural value for the indigenous peoples in the region.²⁴ Language is more than a form of communication, it is an identifier used to distinguish between peoples. The manipulation of these cultural symbols allows the populist to connect with the "pure people" by proving they too belong to this group. Combined with catchy slogans and phrases, the cultural elements used by populists become successful propaganda in their campaign.

The use of cultural or ethnic symbolism by populists has resulted in its own sub-category of populism, referred to as "ethnopolitism". An ethnic populist will use his ethnicity or cultural identity to establish a connection to the "pure people" while simultaneously separating himself from the "elite". The ethnopolitist will use the ethnic bond shared between himself and the people as proof of his legitimacy. In Europe, the ethnic distinction will be established between the native people and the "aliens", or immigrants, but ethnopolitism is especially favored in Latin America. In Latin America, ethnic populism often characterizes a populism related to the

²³Mudde, *Populism: A very short introduction*, 10

²⁴ Chantelle Bacigalupo, "In Bolivia, the National Flag and the Indigenous Wiphala Become Symbols of Division." Remezcla, November 11, 2019, <https://remezcla.com/features/culture/bolivia-national-flag-indigenous-wiphala-symbols-division/>.

mobilization of indigenous peoples.²⁵ The ethnopolitist is not always a member of the majority ethnicity, however. The goal of any populist is to separate him or herself from the “elite”, so the ethnopolitist identifying himself with the ethnic minority will suffice as long as he can prove that ethnic minority is also at odds with the “elite”.

Alberto Fujimori, President of Peru (1990-2000) is the best example of minority ethnopolitism. Born to Japanese immigrant parents, Fujimori was able to use his cultural background to place himself outside the white elite who had run the country into economic turmoil. His opponent in the 1990 presidential election was well-known author Mario Vargas Llosa who, aside from being a famous cultural figure, represented everything Fujimori was not: the white elite. He established himself as part of the “pure people”: a minority being discriminated against and oppressed by the white oligarchy. By framing himself as a clean actor with no ties to any organization or political group, Fujimori was able to win the election by identifying with the struggling people, making him a classic populist leader. The quintessence of populism, be it ethnic or otherwise, is always the distinction between the “us” versus “them”, and the populist is always the leader of the people.

The populist is not just the leader of the people, he is their only true representation. “Populists are always antipluralist: populist claim they, *and only they*, represent the people.”²⁶ The populist leader is the vox populi, meaning anyone that opposes them or claims to serve as a “better” representation of the people is corrupt and either part of the elite or an elitist sympathizer. Populist rhetoric claims that the will of the people is the only legitimate source of sovereignty.²⁷ Of course, just as the characterization of the “pure people” vs. the “corrupt elite” may vary depending on the leader, so will the vox populi. The populist will manipulate what he or she

²⁵Mudde, *Populism: A very short introduction*, 14

²⁶ Müller, *What Is Populism?*, 38

²⁷ Spruyt, Keppens, and Van Droogenbroeck, "Who supports populism and what attracts people to it?", 336

claims to be the will of the people to fit their personal agenda, but the essential message is always the same. They will always identify themselves with the people and ideologically separate themselves from the elite. By establishing this connection to the people and gaining their trust, the populist claims he or she has the authority to speak as the one true voice of the people.

1.4 Populism and Democracy

Once in power, populists will often test their limits within the boundaries of democracy.²⁸ A leader will make a number of changes after taking office to establish the possible extent of his or her authority. Referendums are a common tactic used by populists to change laws quickly under the guise of “popular vote”. If an electorate votes in favor of the leader’s proposed referendum, the populist can claim that the decision is the will of the people, and the Democracy has no choice but to follow suit. As a result, new laws may be enacted that seemingly benefit the “pure” people, and occasionally the constitution itself may be altered or re-written.²⁹ The process of re-writing or introducing new constitutions is not uncommon for populist leaders, especially in Latin America. By manipulating the law of the land, the populists shift the power in their favor while simultaneously claiming these changes are for the benefit of the people.

For most populists, completely eradicating the democratic system would be counterproductive as it would have a very negative impact on their reputation, both domestic and international.³⁰ Instead, populists tend to favor illiberal democracy, or at least a diluted form of the democratic system, which supports the position of the populist leader. Semantics aside, while it is not the intention of the populist to eradicate democracy, populism is at odds with *liberal*

²⁸ Müller, *What Is Populism?*, 53

²⁹ Mudde, *Populism: A very short introduction*, 17

³⁰ Müller, *What Is Populism?*, 97-99

democracy.³¹ Populism openly rejects pluralism, or the concept that power should be dispersed among diverse groups and sovereign bodies, not only maintained within the majority. Liberal democracies assume that diversity is beneficial to society and that autonomy should be enjoyed by all groups, organizations, and minorities. Populist discourse renounces pluralism as it sees the will of the majority will always unjustly suffer at the expense of the minority. This rhetoric is extremely divisive, and most populists will claim to refuse cooperation with the “elite”, or those who disproportionality value minorities over the majority rule. Consequently, while populism may be democratic, it will always clash with liberal democracy.

As the two types of democracy cannot coexist, the success of a populist leader will inevitably lead to systematic changes, or, depending on the degree of his or her prosperity, democratic backsliding. The process of centralizing power in favor of the populist leader is a de-democratization technique used to introduce a shift towards authoritarianism.³² During this process, the leaders will attack opponents that try to mitigate their power and introduce or change legislation to support the democratic breakdown, giving them further control. Opposition media, politicians and protestors will be portrayed as enemy-members of the “corrupt elite” and may even be silenced or removed as the breakdown strays further from liberal democracy.

As Mudde points out, however, the same way that populism can be a threat to liberal democracy, it can also be a corrective.³³ In theory, populism has a positive impact on democracy as it supports popular sovereignty and the will of the people. The vox populi guides the populist because without the backing of the people, the success of the populist would cease to exist. If the will of the people is the driving force and center of populist discourse, then it only stands to

³¹ Mudde, *Populism: A very short introduction*, 81

³² Mudde, *Populism: A very short introduction*, 95

³³ Cas Mudde, and Cristóbal Rovira Kaltwasser, "Populism and (liberal) democracy: a framework for analysis," in *Populism in Europe and the Americas: Threat or corrective for democracy* (Cambridge University Press, 2012), 17

reason that populism and democracy theoretically go hand in hand. In this context, populism can be viewed as a “corrective” for liberal democracy as it’s intended purpose is to bring the will of the majority to the forefront. The people express their discontent within the democratic political establishment, and the populist’s responsibility is to ensure these grievances are acknowledged.³⁴

Müller disagrees with this idea, writing that “populism is not a corrective to liberal democracy in the sense of bringing politics ‘closer to the people’ or even reasserting popular sovereignty, as it sometimes claimed.”³⁵ While it may shed light on the lack of representation in a society and can be useful in identifying the groups within a population that feel marginalized, the ends do not justify the means. What populism does do, which could result in benefits down the line, according to Müller, is “force defenders of liberal democracy to think harder about what current failures of representation might be.”³⁶ So while authors may not agree on populism itself having a possible “corrective” element to liberal democracy, there is consensus on the fact that populism could, unintentionally, have some beneficial outcomes.

With that being said, populism is not inherently negative, although it generally holds a negative connotation. Populism is often described as a “danger” to democracy and to the liberal order, but “populism” itself is no more than a political dynamic or tactic used by leaders. The danger, if it does in fact exist, lies with the leaders themselves and the extent of their power. As Müller writes,

This is not to say all populists will send their enemies to a gulag or build walls along the country’s borders, but neither is populism limited to harmless campaign rhetoric or a mere protest that burns out as soon as a populist wins power.³⁷

A populist leader may become a threat to the liberal democratic order of his or her nation as the system gradually shifts towards authoritarianism, but a populist leader may also be beneficial to the

³⁴ Ibid., 20-21

³⁵ Müller, *What is Populism?*, 174-175

³⁶ Ibid., 175

³⁷ Ibid., 12

deepening of democracy.³⁸ The mobilization of marginalized people, or those who feel misrepresented by the “elite”, is perhaps the greatest example of populism’s positive impact on society. It fosters the “democratization of democracy”³⁹ and gives a voice to those who may feel inadequately represented.

This is, at least, what populists want the people to believe. At face level, populism mobilizing minorities and allowing them to believe they’re being accurately represented is a seemingly positive consequence of populist leadership. In reality, however, this is no more than a manipulation tactic to distract the people.

While populists often call for referenda, such exercises are not about initiating open-ended processes of democratic will-formation among citizens. Populists simply wish to be confirmed in what they have already determined the will of the real people to be. Populism is not a path to more participation in politics.⁴⁰

By using the vox populi, via referendums, voting or other seemingly democratic exercises, the populist attempts to justify and portray his actions as the will of the people.

It is also important to note that while populism may be a defender of democracy, it only exists as a product of democracy.⁴¹ “Populism arises with the introduction of representative democracy; it is its shadow”.⁴² Democracy allows the people to have a voice and express their grievances openly with the political institution. The ability to communicate these discontents through elections, referendums, protests, etc. is what allows for the emergence of populism. Democracy gives the people the opportunity to voice their opinions in the hopes that their gripes will be heard and considered; the populist leader appears as the answer to these grievances. Thus, populism is essentially born of the soil of democracy.

³⁸ Mudde, “Populism and (liberal) democracy: a framework for analysis,” 21-22

³⁹ *Ibid.*, 21-22

⁴⁰ Müller, *What is Populism?*, 173

⁴¹ Mudde, “Populism and (liberal) democracy: a framework for analysis”, 17

⁴² Müller, *What is Populism?*, 39

1.5 Political Implications of Populism

What this section clearly demonstrates is that populism is a current and important topic of political science that should be analyzed and carefully monitored. Its dynamic and malleable temperament is what makes populism so difficult to evaluate, but it is also what makes it so crucial for political analysts. As this section has illustrated, populism is more than a blanket term used to describe a broad array of political ideologies. It is a thin-centered ideology that can be identified by a number of standard characteristics: an “us” versus “them” discourse where society is divided into two homogenous groups at odds; a charismatic and persuasive leader who claims to be the only true representative of the “pure people” against the “corrupt elite”; and an antipluralist philosophy where the majority rule outweighs the immorality of the elite. Zakaria writes, “the crucial element in the mix is politics: countries where mainstream politicians have failed to heed or address citizens’ concerns have seen rising populism driven by political entrepreneurs fanning fear and latent prejudice.”⁴³ In a rapidly changing world, populism can seemingly provide easy answers to complex socio-political problems.

But populism is not an answer to social grievances, nor is it a political dogma that can be easily identified and analyzed. It is a supple ideology, malleable enough to develop under any appropriate philosophy. Populism is a term to be analyzed on a case-to-case basis, and it is important to remember that while the circumstances may change, the standard identifiers of populism will remain. Viktor Orban’s Hungary may differ ideologically from Hugo Chavez’ Colombia, but notable similarities can be identified in how the leader’s developed their power and changed the political system of their respected nations. The conditions will vary but the central

⁴³ Fareed Zakaria, “Populism on the March: Why the West Is in Trouble,” *Foreign Affairs*, October 17, 2016, <https://www.foreignaffairs.com/articles/united-states/2016-10-17/populism-march>.

message is always the same: the leader is the only representative of the moral people, and with the full support of the pure people, he or she will change the system for their benefit.

Populism can have a positive or a negative impact on democracy, depending on the nation and the specific conditions of that nation's democratic system. More representation and the mobilization of people can be constructive benefits of a populist's impact, but the more power and support a leader gains the more dangerous he or she may become. As a leader secures more influence, his or her progress should be monitored to ensure it does not result in democratic backsliding. The changing of laws via biased referendums, the rewriting of constitutions, the extremity of divisive or potentially violent rhetoric and how the leader handles opposition to their rule are all signs to be observed with a populist leader or political party.

For better or for worse, one thing is clear: populism is on the rise and more people are putting their faith in populist leaders. Journalist Fareed Zakaria writes,

Ronald Inglehart and Pippa Norris calculate that since the 1960s, populist parties of the right have doubled their share of the vote in European countries and populists of the left have seen more than a fivefold increase. By the second decade of this century, the average share of seats for right-wing populist parties had risen to 13.7 percent, and it had risen to 11.5 percent for left-wing ones.⁴⁴ There is a growing sense of political dissatisfaction, and the seemingly simple answers that populists offer voters has led to an increase on both the far left and right.

Now that a clear definition has been presented on what populism typically looks like and what the standard identifiers are that characterize it, we must shift gears to focus specifically on the characteristics generally associated with populism in Latin America. We will use the generally accepted definition of populism as a "thin-centered ideology" that appeals to the "pure people" and denounces the "corrupt elite" and analyze how this term is utilized to describe various Latin American examples.

⁴⁴ Zakaria, "Populism on the March: Why the West Is in Trouble."

Chapter 2

Populism in Latin America

2.1 A Brief Overview of Populism in Latin America

Latin America is one of the regions with the greatest history of populist institutions.⁴⁵ Years of socioeconomic inequalities, a clear distinction between the oligarchy in power versus the citizens, and complicated democratic traditions all make for easy breeding ground for populism. When analyzing politics in Latin America, it is vital to keep in mind the timeline in which it has developed. Latin America, which refers to Central America, South America, and southern portions of North America, was under European imperialist control for nearly four hundred years. European nations, predominantly Portugal and Spain, divvied up the lands in the 15th and 16th centuries, and the countries only gained their independence in the 19th century. With the newfound independence from Argentina to Mexico, the 1800s were virtually a trial-and-error period for the new nations trying to establish themselves as sovereign states.

When taking into consideration Latin America's relatively short experience with sovereignty and democracy, the prevalence of populism is understandable, as is the general distrust the people have for political institutions. As Mudde writes, "the concentration of economic and political power in a small minority makes the populist discourse particularly appealing, since it helps to identify the existence of a fraudulent oligarchy (*oligarquía*) that acts against the wishes of the people (*el pueblo*)."⁴⁶ Centuries of repression combined with popular dissatisfaction brews the ideal storm for populist leaders to rise to power.

⁴⁵ Mudde, *Populism: A Short Introduction*, 27

⁴⁶ *Ibid.*, 28

Populists claim to provide easy answers for the complex political problems in a nation by pinning the people against a common enemy. In Latin America, no matter what the context, that enemy is always some variation of the same concept: corrupt governments, also referred to as the oligarchy.⁴⁷ Whether those imperialist forces are foreign governments trying to take advantage of Latin America's vulnerabilities, or domestic elites who have maintained control of the political institutions since the colonial era, the culprit always has similar qualities. Latin American populists build their campaign on the claim that the American people have been taken advantage of for too long, and the leader is the hero there to save them.⁴⁸

Unfortunately, in most cases of Latin American populism, the success of a populist regime often leads to democratic backsliding and occasionally pushes already fragile democracies to authoritarianism.⁴⁹ Opposition to the populist leader slowly begins to disappear and so do the institutional parameters of the liberal democracy. Although not always the case, in many instances Latin American populist leaders are inexperienced politicians who rose to power as "outsiders".⁵⁰ The lack of political experience is a campaign tactic used by populists to connect with the people by creating an "average citizen" persona, but it can also be dangerous as the leader's power grows. Since many Latin American populists are elected as first-time politicians, they are typically inexperienced with, or uninterested in, the institutions of liberal democracy. One of the fundamental characteristics of populist rhetoric is that the political establishment is elitist and corrupt, as are the institutions that protect it. Therefore, the elected populist will introduce policies to dismantle the establishment and consequently stray further from democracy.

⁴⁷ Ibid., 28

⁴⁸ Ibid., 32

⁴⁹ Mudde, "Populism and (liberal) democracy: a framework for analysis", 21-22

⁵⁰ Mudde, *Populism: A Short Introduction*, 73

As Kurt Weyland eloquently writes, “populism emerges when personalistic leaders base their rule on massive, yet mostly noninstitutionalized support from large numbers of people”.⁵¹ In order for a populist to be successful, he needs support from the masses while staying true to the anti-establishment strategy. It is almost necessary for the populist to demonize representative democratic institutions because their entire campaign is founded on the idea that once elected, they will level the playing field and eliminate the power of the corrupt elite. Populism utilizes the “us” versus “them” concept to divide society, but he or she must continue to prove to the people that the leader is actively working for the people and not supporting the evil elite.

The idea of the single, homogenous, authentic people is a fantasy... and it’s a dangerous fantasy, because populists do not just thrive on conflict and encourage polarization; they also treat their political opponents as ‘enemies of the people’ and seek to exclude them all together.⁵² The lack of cooperation often results in institutional crisis, and eventually, if not handled quickly enough, in democratic backsliding.⁵³ Since many Latin American populists use their power to dismantle the systems and change laws or even re-write constitutions, their regimes usually last longer than would traditionally be accepted in classic representative democracies.⁵⁴

2.1.1 Inclusionary Populism

Latin American populism is generally described to be “inclusionary”, compared to the “exclusionary” populism noted in Europe.⁵⁵ In most cases of European populism, the expressed

⁵¹ Kurt Weyland, "Clarifying a contested concept: Populism in the study of Latin American politics." *Comparative politics* (2001), 18

⁵² Müller, *What Is Populism?*, 11-12

⁵³ Weyland, "Clarifying a contested concept: Populism in the study of Latin American politics.", 18

⁵⁴ Getúlio Vargas’ reign in Brazil spanned the course of two decades, first serving as President from 1930-1945, and then again from 1951-1954; Juan Perón was president of Argentina nearly ten years (1946-1952) before he was overthrown and exiled, and the same for Alberto Fujimori in Peru (1990-2000); and Hugo Chávez of Venezuela was president for fourteen years (1999-2013).

⁵⁵ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 2

purpose is to exclude a certain undesirable group that is allegedly a danger or stain on the nation's society. The target for European populists, especially in recent years, are immigrants or refugees that do not assimilate or conform to the society, and populist rhetoric claims that they are the enemy as they take away from the nation's common identity.⁵⁶ In Latin America, the intended purpose of populism is to include underprivileged groups within society that they claim have been disproportionately taken advantage of by the corrupt system.⁵⁷

Again, taking Latin America's tumultuous political history into account provides us with an obvious correlation behind the populist rationale. Centuries of imperialist abuse unduly impacted indigenous societies, black or mixed-race Americans, and poor people (who often come from the two previously mentioned racial classes), and political sovereignty did not resolve these societal inequalities overnight. Colombian liberal scholar Ramón Mercado said, "Independence only scratched the surface of the social problem, without changing its essential nature."⁵⁸

The independence movements did, however, bring increased self-awareness and general consciousness to the social, political, and economic disparities plaguing Latin American societies, and the foundations for the beginning of populism were formed. Populists in Latin America appear as outsiders to the traditional political order who are willing to bring political justice to the people. As the phrase goes, "you catch more flies with honey than with vinegar", Latin American populists know that they will gain popular support with an inclusionary agenda that claims to represent the "people".

The better the populist governments foster the inclusion and participation of disenfranchised groups, the more success they have with the masses.⁵⁹ It is crucial to remember

⁵⁶ Ibid., 17

⁵⁷ Ibid., 25

⁵⁸ Benjamin Keen and Keith Haynes, *A History of Latin America* (Boston: Wadsworth Cengage Learning, 2012), 187

⁵⁹ De la Torre, "In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador", 29

that the success of a populist is determined by his following, meaning the power of populism lies in the number of followers, not necessarily how he achieves this fame.⁶⁰ In which case, it could be argued that the inclusionary strategy is no more than a campaign ploy for populists to gain control through seemingly democratic means. Whether or not the “all-encompassing” discourse is simply a campaign tactic, or a genuine goal of the populist of course varies depending on the leader and contextual circumstance. In many cases, however, the re-written laws, economic policies and altered constitutions do have a positive impact on the lives of the middle- and lower-class people at least in the beginning of the leader’s reign⁶¹. State-run programs focused on the redistribution of wealth combined with more job opportunities resulting in reduced rates of poverty are common in the first years of populist governments⁶², but these face-level improvements do not always last. Unfortunately, the more power and support they gain in office, the more tumultuous the situation can become and possibly lead to democratic backsliding.

The political inclusion in Latin American populist discourse often has a symbolic dimension as well.⁶³ It is not necessarily the policies that the populist leader claims he or she will impose once in office, but rather the simple fact that the populist is thinking of the “underdog” group at all. The symbolic significance of the peoples’ grievances and injustices being acknowledged is often enough to mobilize the society and support the populist’s campaign. More importantly, Latin American populists are outsiders just as the “pure” people are by including themselves in the same marginalized category as their constituents, the populist establishes a

⁶⁰ Weyland, "Clarifying a contested concept: Populism in the study of Latin American politics.", 12

⁶¹ Juan Perón enjoyed great success in the beginning of his political career. Under his presidency, Argentina saw some of the highest employment rates and best economic growth in the nation’s history. He passed a series of progressive policies which allowed workers to enjoy increased pensions and benefits and encouraged more men and women to play active roles in the workforce. (Source: Keen and Haynes, *A History of Latin America*. 9th ed. Boston, MA: Wadsworth Cengage Learning, 2013, 380-385)

⁶² De la Torre, "In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador," 28

⁶³ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 26

metaphorical bond between himself and the people⁶⁴. This symbolic inclusion is just as, if not more important, as the inclusionary discourse the populist uses to gain support. The idea is established that if the populist succeeds, so do the people, because they are all one body.

2.1.2 Left-Wing Populism

Latin American populism typically, although not always, leans towards left, liberal and socialist politics.⁶⁵ A clear correlation can be made between the left-wing tendencies of Latin American populism and the inclusionary discourse. The ideas behind the inclusive policies of Latin American populists are generally progressive and left-wing by their very nature.⁶⁶ The central belief of conservatism is the preservation of traditional values and continuation of long-established customs, be they cultural, economic, or ideological. Seeing that the intended purpose of populism in Latin America is to change the status quo and challenge the traditional political order, it is reasonable that the discourse would follow a left-wing path.⁶⁷ The populists argue that the long-standing power has always remained in the hands of the corrupt elite and their objective is to turn the system on its head by giving the people their due sovereignty. The close connection that the populists have to their *americanismo* and the idea that their purpose is to unify against external, foreign powers prefaces a more reformist form of politics.⁶⁸

This ideology is inherently progressive, and even radical depending on the extent of the populist's proposal. The extent of how left leaning the populists are typically depends on the period in Latin American populism. While classic Latin American populists were more inclined

⁶⁴ Müller, *What is Populism?*, 43

⁶⁵ *Ibid.*, 21

⁶⁶ *Ibid.*, 2

⁶⁷ *Ibid.*, 21

⁶⁸ *Ibid.*, 23

to liberal or subtly progressive politics, the modern period of populism in the region has seen a socialist, even radical, turn. In contrast, European populism is usually closely linked to exclusionary nativism and extreme nationalism, leading it to be more right-wing.⁶⁹ This is not to say, however, that all populists in Latin America have been progressive or left-wing⁷⁰, nor that every example of European populism is conservative, but the ample examples noticed in the regions allow us to arrive at these conclusions based on ample evidence. The left-right dimension in populism is very complicated, as the term itself does not intrinsically allude to a specific political ideology, but the plentiful number of left-wing examples in Latin America describes an important pattern.

2.1.3 The Role of Economics

The two most important factors that have an impact on the characterization of Latin American populism are the economy and the role of identity. These factors are not specific to the characterization of populism in Latin America, but their influence on the prevalence of populism is significant. The economy is utilized by populists to identify fiscal differences between the pure people and the corrupt elite. While in Europe economic distinctions come secondary to nationalist identity in populist rhetoric, in Latin America the two play relatively equal roles as they typically coincide.⁷¹

⁶⁹ Ibid., 20-23

⁷⁰ Jair Bolsonaro, current President of Brazil, is undoubtedly the perfect example of a radical right-wing Latin American populist. He won the 2018 election with 55% of the votes, adding up to nearly 50 million people and he is the first military commander to hold the position since 1945. (Source: Xavier, Luiz Gustavo. "Jair Bolsonaro É Eleito Presidente Da República Com 55% Dos Votos ." Portal da Câmara dos Deputados, 2018) Recently, Bolsonaro has been in hot water and even accused of crimes against humanity due to his deliberately irresponsible Covid-19 pandemic response, and while he tries to cling to power, it seems increasingly unlikely that he will win re-election. (Source: Barbara, Vanessa. "Opinion: Bolsonaro Está Ficando Desesperado, e Não Há Dúvidas Sobre Suas Intenções." The New York Times, 2021.)

⁷¹ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 12

One of the main challenges for Latin American countries is the relatively short period of time that they have been sovereign states, meaning their economies have developed very differently than in Europe. While Europe underwent organic economic and political development over the course of various centuries, Latin America was essentially a dependent state, meaning up until the point of independence, their economic progress not only relied on Europe, but directly benefited Europe. Even after independence, the basis for the economic and political system established in Latin America was derived directly from the European models of liberal democracies.

For this reason, there are no formal norms for economic progress in the region; the Latin American system is an amalgam of a variety of borrowed ideologies and concepts.⁷² The ideological ambiguity and lack of independent economic tradition has made it difficult for the region to flourish financially. Since the independence movements, Latin American leaders have been tasked with the challenge of developing their respective nations' economies and attempting to compete in the quickly evolving global economy. While some states have advanced better than others, Latin America has been viewed quite negatively by the Western world from an economic viewpoint.

The struggle to contend with global development has been one of the main driving factors in the rise in populism in the region. Populist leaders will draw the people's attention to the unfair advantage that Western elites have over their economies because Western economies have benefitted from Latin America's stagnation. The corrupt establishment is to blame for the region's lack of development, and the only way to change that is to overthrow the bureaucracy,

⁷² Kenneth Coleman, "Politics and Markets in Latin America: A Distinctive View of the Role of the State in Service Provision?," *Citizen Views of Democracy in Latin America*, (2001), 186

which will in turn give power to the people. As Müller notes, often the populist will exaggerate the economic situation of a nation in order to legitimize their rule.

By dramatizing the economic and political situation in the country and portraying it as a crisis, the populist instills a sense of urgency in the people to trust his word and authority.

Müller writes,

Populist will often eagerly frame a situation as a crisis, calling it an existential threat, because such a crisis then serves to legitimate populist governance. Put differently, a “crisis” can be a performance, and politics can be presented as a continuous state of siege.⁷³

The corrupt elite is always to blame for this crisis, one way or another, and populists believe the only way to hold them accountable is by dismantling the system that benefits them. The anti-establishment ideology is consistent amongst Latin American populists, but the economic approach used by the populist differs vastly depending on the period. Populists in the 1980s and 90s, for example, enforced neoliberal economic policies and supported the International Monetary Fund (IMF), which is completely opposite to the modern populists of the 21st century who promote socialist policies and are against the *laissez faire* economics of their predecessors.⁷⁴

While the economic policies and ideologies are important in Latin American populism, the real reason economics plays such an important role in Latin America stems from the relationship between money, power, race, and social class in the region. Economics is more than just a national issue; there is a personal significance for the American people. The current correlation between individual wealth and social status has deep roots in the socioeconomic foundations established during the colonial period in Latin America. Under European imperialist rule, the white *pennisulares* and their direct descendants always maintained full control of the wealth and power in the region. When the imperialist system was abolished, the consecrated

⁷³ Müller, *What is Populism?*, 77

⁷⁴ *Ibid.*, 200

wealth was not distributed among the lower, underprivileged classes that had been denied economic advancement during the previous centuries, meaning the socioeconomic system remained the same.

When the Latin American economies revived because of the expansion of the export sector, indigenous peoples suffered most because this revival served mainly to accentuate their poverty and backwardness. Their economic marginality; their almost total exclusion from the political process; the intense exploitation to which white and mestizo landowners, priests and officials subjugated them; and the barriers of distrust and hatred that separated them from the white world prevented any thorough-going acculturation, much less integration.⁷⁵

As a result of this unjust revenue distribution, economics have become the main concern of Latin American populist discourse.

Populists know that many of the people may not understand the technicalities behind the workings of the economy, but they do have a very clear grasp on the unjust disparities between the wealth of those in power versus themselves. Successful populists must appeal to the emotions of the people, so by acknowledging the economic rift in society, Latin American populists make the people feel seen. The populist draws on the unethical gap in the financial successes of the corrupt elite compared to the misfortune of the pure people. The idea that the “rich get richer while the poor get poorer” is exacerbated by populists who claim that the elite are not only benefitting from the people’s adversities, but they are also the root cause. The populist portrays himself as the hero meant to ensure that the hardworking people no longer fall victim to the lackadaisical elite.

⁷⁵ Keen and Haynes, *A History of Latin America*, Vol. 2, 190

2.1.4 Identity and Americanismo

Identity also plays a crucial role in Latin American populism for a similar reason; the American identity has also suffered as a result of imperialism. The concept of identity in Latin America is unique and very different than in Europe, Asia, and Africa. Race and the social class have played crucial roles in determining the identity of Americans since the colonial era, and these determinants still hold true today because, while the system itself may have changed after the states became independent, the ideology behind it did not. The early 1900s in Latin America were essentially a continuation of the post-independence period of the previous century. Newly sovereign states were tasked with the challenge of self-identification and nation building, but remnants of imperialist ideologies remained.

The structure of social class and caste in the Americas, especially Latin America, has always been complicated due to the diverse societies and the stigmas held by each class. In most basic terms, under colonial rule there were four social classes: the ruling class, divided by the European-born *penninsulares* and their “*creole*” European descendants born in the “New World”; the *mestizo* class, mixed race individuals of indigenous and European parents whose status and power varied due to their ambiguity; indigenous peoples, who had very little to no power and were often exploited for resources and labor; and black slaves, *mulatos* (product of European and black parents) and *zambos* (products of black and indigenous parents) who were at the very bottom on the social ladder.⁷⁶ While the colonial caste system in Latin America ended with independence and the sovereign nations became democracies, the impact it had on society remained, as did the social class structure.

As a result of this centuries-old system, Latin America was confronted with a myriad of national identity dilemmas, which is one of the main reasons populism has flourished so well in

⁷⁶ Keen and Haynes, *A History of Latin America*, Vol. 1, 114-116

the region. Identity is a very easy way to distinguish group differences in a society, making it an optimal tool for populists. The division is simple: the “native” people to the land are the pure people, and the “outsiders” are the elites. The basic concept here is the same in Europe and Latin America, the difference lies in the context. In Europe, nativist populism claims that the “outsiders” are immigrants and foreigners who take advantage of the countries’ resources, and the elites that support their rights over the “pure” native citizens are corrupt enemies of the people.⁷⁷ The “enemy elites”, made up usually of center-right politicians, may be natural natives themselves, but the fact that they favor the interests of others over their own people is where the corruption lies.

In Latin America, the context is very different. Latin America is, by consequences of its imperialist history, a diverse society made up of different racial and ethnic concoctions. The concept of a “foreigner” versus a “native” is much more complicated than it would be in a European state because of the globalized identity of Latin American states. Instead of there being one “native” archetype, populists in Latin America unify the people by utilizing the unique term *americanismo*. *Americanismo* is an umbrella term initially coined in the 19th century that unifies the American-born citizens under one common identity⁷⁸. This ideology is the perfect tool for populists looking for a way to unite the people and divide society into two distinct groups. Foreign governments trying to exploit Latin America, and the elites who support the oligarchy, are the antithesis of *americanismo*, making them the enemy of the people.

The *americanismo* concept is a seemingly unifying ideology that seems to provide Latin America with one consolidated identity, but ethnic politics has become increasingly more common in the region. Indigenous and minority ethnic groups have become increasingly

⁷⁷ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 17

⁷⁸ *Ibid.*, 18-19

mobilized across the continent, especially in countries where the “minorities” make up a much larger percentage than in others. This increased minority mobility is a direct result of the post-independence period in Latin American history that led to broadened opportunities for American society. While the independence movements were solely focused on separating from imperialist oppressors and national sovereignty, the post-independence revolutions aimed for popular mobilization and equal representation. These revolutions have resulted in very positive outcomes, like an increased mestizo pride and better equality for indigenous and black Americans.⁷⁹

2.1.5 Ethnopolitism

Ethnic politics mobilize people based on ethnic or racial elements. As the world becomes a more globalized society, identity and ethnic politics have seen a sharp increase. People look for something that unites them while simultaneously separating themselves from other groups; this builds the perfect foundations for a rise in populism. Although ethnic or identity politics and ethnic parties focused on indigenous mobilization do not always use populist appeals or tactics, populism is often the product of such polarizing and personalist politics, especially in Latin America.⁸⁰

Populists who base their campaign specifically on ethnicity are referred to as ethnopolitists, and in Latin America they have become increasingly popular. In the last couple of decades, indigenous mobilization has become widespread and very successful; indigenous people have taken to the streets demanding reform and reparations.⁸¹ The ethnopolitist discourse is easy

⁷⁹ Miguel Basáñez and Pablo Parás, “Color and Democracy in Latin America,” in *Citizen Views of Democracy in Latin America*, ed. by Roderic Ai Camp, (University of Pittsburgh Press, 2001), 140

⁸⁰ Madrid, Raúl L. *The rise of ethnic politics in Latin America*. (Cambridge University Press, 2012), 27

⁸¹ *Ibid.*, 24

to transmit; the native people of this land have been wronged for centuries and must now revolt against the abusive oligarchy. The populist is a member of the pure people's ethnicity, making him a trustworthy leader, and their campaign promises systematic reform that will benefit the indigenous and mestizo people, much like any other populist movement.

What makes ethnopopulism so overwhelmingly successful in the region is the inclusionary element that is central to traditional Latin American populism. Populism in Latin America is inclusive and reaches across many ethnic groups because the ethnic makeup of the countries is so diverse and varying. The successful ethnic parties, therefore, branch out beyond their own ethnic group and encourage the participation of non-indigenous voters.⁸² *Americanismo* plays an important role here, because the ethnopopulist parties demonstrate that, while their objective may be more indigenous inclusivity, their goal is a better nation for all hard-working citizens.

Americanismo combined with the element of *mestizaje*, or ethnic and racial mixing, makes this inclusionary populist strategy so auspicious in Latin America. Almost all Latin American citizens are mestizos in their own right, so a movement that looks to celebrate and support the society's diversity instead of ignoring it, as is the case in typical centrist parties, appeals to a large number of voters. The ethnic makeup of Latin American nations varies greatly from country to country⁸³, but the regional concept of *mestizaje* and diversity has created a society of ethnic fluidity and low ethnic polarization, making ethnopopulism even more successful.⁸⁴

⁸² Ibid., 25-26

⁸³ Argentina, for example, is one of the least ethnically diverse countries in Latin America, with roughly 97% of the citizens identifying as white or mestizo. In Mexico, 62% of citizens are identified as mestizo and over 20% are indigenous. In order, the countries with the highest percentage of indigenous people are Bolivia, Guatemala, and Peru. While Latin America as a region can be characterized as "diverse", it is crucial to keep in mind that the ethnic and racial demographics vary drastically from country to country as each individual nation has its own history. (Source: Central Intelligence Agency. "Argentina." *The World Factbook 2021*. Washington, DC: Central Intelligence Agency, 2021)

⁸⁴ Madrid, *The rise of ethnic politics in Latin America*, 4

2.2 The Evolution of Latin American Populism

Populism in Latin America has gone through many phases, and just as populism anywhere in the world, it looks different on a case-to-case basis. While the specifics may change depending on the country or situation, we can still divide the populist trends seen in Latin America into various stages. What characterizes the evolving stages of Latin American populism is debated upon by many scholars in the field⁸⁵, but for the purpose of this study I find it best to divide the evolution into two periods: classical and new.

After the initial liberation period in Latin American political history, we begin to see populist tendencies emerge in several countries in the early 1900s. This initiates the “classical” period in the evolution of Latin American populism, and essentially it can be best characterized as a response to economic crises. This period spans from the early 20th century until the mid 1990s, but to better analyze it, we shall divide it into two sub-categories, which I will refer to as the “caudillo era” and the “neoliberal era”. While these eras differ slightly in their characterization, and many scholars analyze them as individual periods, I believe that together they accurately portray the evolution of classic Latin American populism in the 20th century.

⁸⁵ Dong Jingsheng (2018) divides periods of populist rule in Latin America into four different eras with examples of leaders from different countries that can be used to define these periods. The first period is the early 20th century, characterized by urban laborers demanding political representation; the second period is the post-depression era of the 1930s and 40s, which saw an increase in industrialization and popular mobilization; the third period is the late 1980s and early 90s, which saw neoliberal reform under leaders like Alberto Fujimori; and the fourth period is the early 21st century, which can be characterized by its anti-globalization, socialist politics. Cas Mudde (2017) divides Latin American populism into three periods: the Great depression to 1960s, characterized by caudillo rule and industrialization; the 1990s, which focused heavily on neoliberal reform; and 2000s to today, characterized by socialist and leftist politics. While both authors may differ on the specifics of the periods they identify, we can see how the characterizations clearly overlap in many instances.

2.2.1 The Classical Period: The Caudillo Era

The self-actualization and skepticism of the social class system inspired the first era of the classical period of Latin American populism. Socioeconomic inequality was one of the biggest grievances of the people after the transition from colony to sovereign state. At the turn of the century, urbanization began to increase as a result of the industrial revolution making its way to Latin America. Many nations, especially in the Southern Cone region of South America, were seeing an increasing middle class and urban labor force, but the citizens were not seeing this reflected in the political representation of their respected nations. A popular awakening began where the middle class, mostly made up of mestizo or creole individuals, came to criticize the unjust power-monopoly of the ruling class over the working class.⁸⁶

The self-determination mobilization efforts of the early 20th century may have been pushed to the margins with the Great Depression of the 1920s, but the unresolved grievances came to the surface again in the 1930s and 40s. After being hit hard with economic crises, tensions were high, and the people were desperate to rebuild their fumbling nations. This led to increased industrialization and urbanization and, as a result, a rising middle and working class. With more people moving to cities and a rapidly growing middle class, came political mobilization.⁸⁷ The working people were looking for strong leadership and were dissatisfied with the socioeconomic inequalities, making for the perfect storm for the introduction of strong, charismatic populist leaders to take center stage, introducing the “caudillo era”.

Caudillo is a term used to describe a strong, personalist political and military leader, and in Latin America the term usually refers to creole military leaders who come to power. In this initial period of populism, caudillos gained influence quickly and often came to power in military

⁸⁶ Dong Jingsheng, “Populismo En América Latina: Un Debate Entre La Teoría y La Práctica,” in *Pensamiento Social Chino Sobre América Latina*, ed. by Wu Baiyi, (CLACSO, 2018), 53

⁸⁷ *Ibid.*, 55

coups, but still gained the support of the people. With the sociopolitical and socioeconomic context of the post-depression era in Latin America, the nations were ripe for the introduction of a populist caudillo leader. After economic crises and unimproved social inequalities, despite a growing middle class in most countries, the people were frustrated and desperately looking for answers.⁸⁸ The populist leader, per usual, takes advantage of the situation at the perfect time and presents himself as the seemingly best answer to these injustices.

He (or she, although rare in Latin America) will use his military reputation to gain the support of the people, combined with classic populist tactics like the use of national cultural symbols, and claim that the best way to gain power is through a military coup. The caudillo is a strong nationalist and defender of the “pure people”, who in this case are the middle- and working-class citizens. He proves his dedication to his nation by being a successful military leader, and the enemy is the elitist oligarchy who hoards all the wealth and power. What unifies the pure people is the collective sense of *americanismo*, or the anti-imperialist idea that all Latin Americans have a shared, common identity.⁸⁹

The people, during this era of populism, are the mestizo or creole people of Latin American who share a unique American identity that separates them from the imperialist oppressors of the colonial period. It is important to note that while the classic Latin American populist rhetoric claims that the “pure people” are the American inhabitants of the land, Indigenous peoples and those of African descent are not included in this group, rather they are purposely left out altogether.⁹⁰ The “corrupt elite” refers specifically to foreign forces and economies that work with imperialist powers and exploit the American people. Mudde writes,

⁸⁸ Sebastian Edwards, "On Latin American populism, and its echoes around the world," *Journal of Economic Perspectives* 33, no. 4, (2019), 78

⁸⁹ Mudde, *Populism: A Short Introduction*, 29

⁹⁰ *Ibid.*, 29

With regard to the corrupt elite, all first wave populists spoke about a national oligarchy in alliance with imperialist forces that was against the economic import substitution industrialization model. In practice, this meant that not the whole establishment was depicted as the corrupt elite, but rather those elite sectors that were at odds with the governance model promoted by populist leaders.⁹¹

Once the populist is in power and begins to implement reforms, the economy reacts positively to the changes and policies made.⁹² In almost every case, employment saw an increase because of better modernization and industrialization, and the countries were seemingly emerging from the economic crises that plagued the previous decades.⁹³ The populist policies seem to work for the satisfied middle class as the economies grow steadier, and the leader's confidence increases with it. Consequently, as is the case with most successful populists, the greater the achievements, the harder the downfall. As the populist progresses, he gradually becomes more power hungry, and constraints put in place to regulate the control are increasingly ignored.

As we analyzed in the previous section, democratic backsliding or regression is common in many instances of populist rule, and the caudillo era is the perfect example of this. When the opposition criticizes the leader or revolts against his policies emerge, they are immediately shut down or dismissed as elitist propaganda. The economy that was once booming under the populist will also inevitably dwindle, and along with it their popularity. The caudillo era Latin American populists criticize globalization because they claim that foreign powers that interfere with American economies are corrupt imperialists, and as result caudillo economic policies restrict foreign exchange.⁹⁴ These policies will work for a time, but eventually inflation will increase, and the deficit worsens due to a lack of international trade. The leader will desperately attempt to revive the economy through more restrictive or even autocratic policies, but as the economy declines, so will the populist's success.

⁹¹ Ibid., 29

⁹² Edwards, "On Latin American populism, and its echoes around the world", 79

⁹³ Keen and Haynes, *A History of Latin America*, Vol. 1, 381

⁹⁴ Edwards, "On Latin American populism, and its echoes around the world", 79-80

The perfect example of a caudillo era populist regime is Juan Perón of Argentina. Born in 1895 in Argentina to immigrant creole parents, Juan Domingo Perón entered the military at sixteen and gradually began to climb the ranks over the decades.⁹⁵ In 1943, Peron led a military coup and served as President of Argentina until 1955, and his reign is the epitome of the evolution of Latin American populist leadership. Peron's success, as is the case for most populist leaders, was his charismatic personality mixed with optimal political circumstances. Juan Peron is the best example of a populist strongman; he came from a decent, hardworking family of somewhat marginal economic status.⁹⁶ He was a trusted member of the military who had proved himself worthy through his quick rise in leadership ranks, and he had the perfect wife by his side.

Aside from his seemingly perfect appearance, he was masterful in the art of persuasion and understood the resentments of the Argentine people. The middle and working classes were fed up with the upper-class hoarding power and wealth. Before Peron came to power, Argentina had undergone decades of tumultuous politics. From radical democracy to militaristic conservative policies, the beginning of the 20th century in Argentina was complicated at best. The 1930s, referred to as the "Infamous Decade", implemented many conservative economic policies and furthered industrialization in an attempt to recover the Argentine society after the Great Depression.⁹⁷ However, while the Argentine economy did improve during the 1930s, political tensions between the bourgeoisie and working class versus the oligarchical wealthy class, which set the stage for Juan Perón to take the reins.

The economic infrastructure developed under the Infamous Decade was not the central issue and Peron understood that it did not need to be re-developed; rather it needed to be adjusted to appease the people. The main concern of the people since the beginning of the 20th century had

⁹⁵ Keen and Haynes, *A History of Latin America*, Vol. 1, 381

⁹⁶ *Ibid.*, 381

⁹⁷ *Ibid.*, 378-379

been economic and political injustice, yet the conservative policies of the previous decade essentially ignored the latter. Peron recognized and emphasized the capabilities of women, ethnic minorities, and working-class people in his discourse.⁹⁸ He implemented progressive policies that would give more power to the working people and encouraged all Argentines to actively participate in their society. The enemy in peronismo populism was the power-hoarding oligarchy of the previous centuries, and Peron's claim to fame was that he could equalize the playing field and give everyone a chance to succeed.

His policies worked for a time, but his eventual downfall was similar to that of most populist leaders; he began to stray too far from his original promises. The enemy in caudillo-era populism are the foreign oligarchic powers that have a monopoly over the pure people, but by the 1950s Peron was actively soliciting foreign investment and working with those he claimed to detest.⁹⁹ His regime grew increasingly more repressive, and the process of democratic backsliding was well underway. He went from being one of the best examples of Americanismo to one of Latin America's most infamous leaders, and in 1955 the final revolt took place and Peron fled into exile.

Juan Peron is only one example of a caudillo-era populist, but his rise and downfall accurately demonstrate the typical characterization of classic Latin American populism. The Latin American people wanted more than autonomy after the dust settled on the independence movements of the previous century; they were looking for equality and stability. Caudillo populists mobilized the working class and bourgeois by encouraging them to fight against the foreign oligarchies that had repressed them for centuries. Populists like Peron were trustworthy strongmen who had success in the beginning of their reign, but eventually succumbed to the

⁹⁸ Ibid., 381

⁹⁹ Ibid., 383-385

repressive techniques of democratic backsliding. Peron undermined and betrayed the people and organizations that were responsible for his success, and he was exiled as a result. The populist is only as successful as his rhetoric, and that prosperity can crumble just as quickly as it developed.

2.2.2 The Classical Period: The Neoliberal Era

As the caudillo-era populists' leadership collapsed, so did the economies across Latin America. Authoritarianism was on the rise, and several budding democracies quickly fell into repressive dictatorships, most notably Chile under the Pinochet regime.¹⁰⁰ Nearly every country experienced periods of economic stagnation. The 1980s were met with economic crises and desperate people looking for strong leadership once again, and this was the backdrop under which the neoliberal era of classic Latin American populism developed. The populists in this era believed that neoliberal reforms to the economy were necessary for stabilization, and global integration would be essential to Latin American prosperity.¹⁰¹

The common enemy for neoliberal era populists were the elites who supported strong, central government and were against free markets.¹⁰² According to populist discourse, the strong governments that had been in power throughout the previous decades were the obvious reason for the detrimental economic recessions and stagnations that had plagued Latin America since the 60s. Here, we notice a crossover from caudillo-era populism; the corrupt elite are those who have hoarded power for their own economic benefit. This is a common theme in Latin American

¹⁰⁰ On September 11, 1973, Chile underwent a violent military coup led by Commander in Chief Augusto Pinochet Ugarte to usurp then President Salvador Allende, who died fighting against the coup. The coup ended Chile's long-standing constitutional government and the leftist government of President Allende and initiated the Pinochet dictatorship, which lasted seventeen years. The Pinochet Regime was accused of vicious torture and repression and in 1998, Pinochet was arrested in Spain for his "crimes against humanity". (Source: The Washington Post, "Pinochet's Chile," *The Washington Post*, 2000.)

¹⁰¹ Jingsheng, "Populismo En América Latina: Un Debate Entre La Teoría y La Práctica.", 55

¹⁰² Mudde, *Populism: A Short Introduction*, 30-31

populism because Latin American populism is often linked to economics. The main concern for the American people is who hoards the wealth because wealth is directly correlated to power. If the upper class has an economic monopoly over a country's fiscal success, they also hold all, or at least most, of the political power, and the working classes are completely dependent on them.

The difference between the caudillo-era and neoliberal-era populists is the strategy. Under the leadership of caudillo-era populists, progressive policies against foreign economic interference were the main objective. Neo-liberal populists ruled by the idea of "if you can't beat them, join them", claiming that the only way to improve the Latin American economies was to join competitive global markets. Using this political-strategic approach, it is evident that this wave of populism was more concerned with the relationships of power, both global and domestic, rather than the distribution of resources.¹⁰³

Neo-liberal populists blamed the political elite for their mishandling of the economic crises that disproportionately impacted the lower- and middle-class citizens. According to them, the enemy was not necessarily the "oligarchy" as it had been for caudillo populists, but rather the "political class".¹⁰⁴ After a series of economic crises and political failures, the Latin American people were vulnerable and desperate; the perfect storm for populism. The neo-liberal populists claimed that the centrist policies of the political class did nothing to help the countries prosper, so strict reforms and cooperation with the International Monetary Fund (IMF) were the only ways to save the countries and the people from any further ruin.¹⁰⁵ While Latin American leaders in previous decades disliked the idea of international economic cooperation, especially in the previous caudillo-era of populism, neo-liberal populists advocated for the benefits it would have.

¹⁰³ Germán Campos-Herrera and Sebastián Umpierrez de Reguero, "Populism in Latin America: past, present, and future," *Latin American Politics and Society* 61, no. 1, (2019), 3

¹⁰⁴ Mudde, *Populism: A Short Introduction*, 30

¹⁰⁵ *Ibid.*, 29

Free market systems promoting the exchange of Latin American goods and services allowed the region to play an active role in the global economy. The claim was that Latin American countries had the potential to grow substantially by joining the global market and increasing trade, so the main objective of this second wave was heavily focused on economics.

The political elite, according to the populists, advocated for a strong state and policies that centralized the power so that they may hoard the influence and wealth without allowing it to trickle down to the masses. The *laissez faire* economic system did in fact bring positive changes in the first few years of the neo-liberal populist regimes. Anti-poverty programs put in place to assist the extreme poor, decreased hyperinflation and a stabilized economy were the benefits of the strict policies of these regimes, gaining them more support amongst the middle and lower classes.¹⁰⁶ As is often the case with populist governments, the leaders follow through on his promises in the beginning, and the positive outcomes of these changes secure support from the pure people who finally feel satisfied.

Consequently, as is also the case in many populist regimes, the democratic backsliding also increases as the popular support does. The neo-liberal populist era may have brought about some positive economic reform, but it was also a period of democratic backsliding like no other. While it is a common trait for populists to alter laws and policies in their favor once taking office, populists during the neo-liberal period went as far as *coup d'états* and completely re-writing constitutions. Once in office, the populists packed their cabinet with members of their own party and rewrote the laws so that they may have more authority to re-arrange the sectors of government to their liking. Opposition leaders in congress are banned, the executive branch is

¹⁰⁶ Ibid., 30

strengthened, and the system of checks and balances is demolished.¹⁰⁷ The re-writing of constitutions is a particularly common tactic used by Latin American populists. Müller writes, “these will be partisan or “exclusive” constitutions designed to keep populists in power in the name of perpetuating some supposed original and authentic popular will. They are likely to lead to serious constitutional conflict at some point or other.”¹⁰⁸

The neo-liberal populist claims that he had to uproot and destroy the corrupt system in order to enact the proper policies necessary to benefit the people, and so long as the economy is stable, the people turn a blind eye to authoritarianism. The irony here, however, is not unique to neo-liberal populists in Latin America, or to Latin America at all; populists usually transform into the exact opposite of what they initially claim. Neo-liberal populists built their campaign around anti strong-centralized government control, but after taking office they re-write constitutions and gave the executive branch more power, resulting in a strongly centralized nation-state.¹⁰⁹

In Latin American populism, the leader is always an anti-institution outsider who prides himself on uprooting the system and creating his own “in the name of the people”. In the neo-liberal era, the increasing authoritarianism was overlooked by the public due to the positive impact the new policies were having on the economy. Unfortunately, the economic boom only lasted so long, and soon the neo-liberal populism outlived its success. “During the period of 1985 to 2000, in most countries of Latin America, the old nationalist-populist parties turned to the right, and as they did so they lost control of the labor movement.”¹¹⁰

¹⁰⁷ Steven Levitsky and James Loxton, "Populism and Competitive Authoritarianism," in *Populism in Europe and the Americas Threat or Corrective for Democracy*, ed. by Cas Mudde and Cristóbal Rovira Kaltwasser, (Cambridge University Press, 2012), 162

¹⁰⁸ Müller, *What is Populism?*, 174

¹⁰⁹ Levitsky and Loxton, "Populism and Competitive Authoritarianism", 162

¹¹⁰ Dan La Botz, "Latin America Leans Left: Labor and the Politics of Anti-Imperialism," *New Labor Forum*, vol. 16, no. 2, (2007), 64

The perfect example of neo-liberal Latin American populism is Alberto Fujimori of Peru, who served as president from 1990 to 2000. Fujimori was born in Lima, Peru in 1938 to Japanese immigrant parents. When he became President in 1990, he adopted a country in economic turmoil. Peru underwent a series of unfortunate natural disasters in the early 1980s that devastated the country's agriculture. To add insult to injury, the price of Peruvian exports like potatoes and sugar dropped significantly after changes in European and North American agricultural industries.¹¹¹ These factors, along with hyperinflation, resulted in an economic crisis and increased levels of poverty. The Peruvian people were desperately in need of change, and Fujimori presented himself as the perfect candidate.

Fujimori was an unknown figure who rose to power as a political "outsider". His opponent in the 1990 presidential election was well-known author Mario Vargas Llosa who, aside from being a famous cultural figure, represented everything Fujimori was not: the white elite. Fujimori was able to use his ethnic background to place himself outside the elite who had run the country into economic turmoil.¹¹² He was just another member of the "pure people": a minority being discriminated against and oppressed by the oligarchy. By framing himself as a clean actor with no ties to any organization or political group, Fujimori was able to win the election by identifying with the struggling people. It is important to note that, while the neo-liberal populist era is best characterized by its heavy focus on economics, identity still played a crucial role in the mobilization efforts for populists.¹¹³ Peru was simultaneously undergoing an economic crisis and a crisis of political representation. Peruvians, especially in the middle and lower classes, had little to no confidence in their government and felt that the major established parties did not represent

¹¹¹ Carlos Alberto Gomez, "Peru's Debt Crisis and Subsequent Shock Economy: A Political and Economic Overview of a Developing Nation," *UCLA International Institute*, (University of California, Los Angeles, 2005.)

¹¹² Levitsky and Loxton, "Populism and Competitive Authoritarianism", 168

¹¹³ *Ibid.*, 166

them accurately. Fujimori created his own political party, ran as a political and ethnic outsider with strict economic recommendations, and won in a landslide.¹¹⁴

Once elected, however, the economic picture he depicted soon became one of poverty and increased dependency. In his campaign, he pledged against privatization of public enterprises, against strong centralized government and promised to lower inflation and poverty, but after taking office none of these promises were fulfilled.¹¹⁵ In 1993, 53.6 percent of Peruvians lived in poverty, 21 percent of those people living in “extreme” poverty; the trade deficit doubled in 1995; and over time, small and midsize industries and agricultural producers were driven to bankruptcy, raising the national debt even higher.¹¹⁶ His extreme neo-liberal programs initially had short-term benefits, but by the end of his presidency the economic situation in Peru was no better than when he began.

Worse than the economic state of Peru under Fujimori’s presidency was his increasing authoritarianism. Immediately after becoming president, Fujimori began using executive decree powers to give more control to the military and attack the Congress and judiciary branch for their “corruption”.¹¹⁷ In true populist fashion, Fujimori dedicated the first years of his presidency to stripping the corrupt elite, which in this case were the ruling members of the “political class”, of their powers. He attacked the entire party system and claimed that these irresponsible and corrupt leaders were the reason Peru could not prosper.¹¹⁸ On April 5, 1992 he carried out an autogolpe, or “self-coup”, closing Congress and the judiciary and re-writing the Constitution.¹¹⁹

¹¹⁴ Ibid., 160

¹¹⁵ Keen and Haynes, *A History of Latin America*, Vol. 1, 549

¹¹⁶ Ibid., 549

¹¹⁷ Ibid, 548

¹¹⁸ Levitsky and Loxton, "Populism and Competitive Authoritarianism", 170

¹¹⁹ Keen and Haynes, *A History of Latin America*, Vol. 1, 548

The suspension and re-writing of constitutions has since become a common practice of Latin American populists. The populists may claim this is a necessary action to give the power back to the people, the real motives behind the altering of the Constitution are much more dangerous. In the case of Fujimori, the new Constitution concentrated all the power in the executive branch by allowing the president to dissolve Congress, have total control over the laws passed, and severely weakened the role of the judiciary branch.¹²⁰ By manipulating the law of the land and breaking down the institutional parameters that he claimed to be an obstruction to the “pure people’s sovereignty”, Fujimori secured power for himself and dissolved Peru’s democracy.

Fujimori enjoyed popular support during the first five years of his presidency, despite his growing autocratic rule. As is the case in most instances of neo-liberal populism, the extreme shift in the economic sphere brings about short-term positive changes, which in turn keep the people satisfied. After 1995, however, Peru’s economy was flatlining and it was becoming increasingly evident that his rule had become competitive authoritarian as the Peruvian democracy was backsliding.¹²¹ Peruvians began opposing his authoritarian behavior by the late 1990s, but the democratic system had already been dissolved and there were very few institutional mechanisms to stop him.¹²² Fujimori ran for a third time in 2000, and although he won the election, the results were declared invalid by the majority in Congress, and he was dismissed and sought exile in Japan soon after.

Alberto Fujimori is only one example, but he is the best testament to how far a populist can go so long as he can maintain the support of the people. For neo-liberal populists, the mobilization of the people was dependent on economic success, or at least economic stability. So

¹²⁰ Ibid., 548

¹²¹ Levitsky and Loxton, "Populism and Competitive Authoritarianism", 176

¹²² Ibid., 177

long as the people see their fiscal and economic status improve, they remain satisfied with the leader; but once the democratic backsliding begins, it is difficult to stop. We see a similar trend in the next wave of Latin American populism, although the mechanisms are very different.

2.2.3 The New Period: The Socialist Era

The new period of Latin American populism begins at the start of the 21st century, not long after the previous era. Extremely unsatisfied with the neo-liberal ideas and policies of the leaders before them, the new-age populists in Latin America can be characterized by their leftist politics. Referred to as the “pink tide”¹²³, a wave of socialist governments emerged in the early 2000s and continued until the mid 2010s. While not all the leftist governments in the region can be considered populist, many (most notably in Venezuela and Ecuador) can be characterized as traditional Latin American populists.

We will refer to this period of populism as the “new”, but this generation was heavily influenced by the classic caudillo-era populists. They are anti-globalization and against the interference of foreign governments in Latin American politics, economics, and society. The socialist-era populists divide the Latin American society into two very distinct groups similar to the groups identified by the caudillo-era leaders: the oligarchy and foreign powers are the “corrupt elites”, while the “pure people” are lower-and-middle-class Americans. The new populists depict a society at odds, where the majority of people are constantly being exploited by the minority ruling class. Mudde writes that “these leaders have developed an inclusionary

¹²³ This refers to the period after the “red tide” that swept through Latin America during the 1940s-60s. The “red tide” was a wave of communist and socialist governments that emerged in countries like Cuba, Nicaragua, and even Chile had some success, but most were overthrown by foreign powers (Nicaragua), replaced by dictatorships (Chile), or resulted in extreme democratic backsliding (Cuba). The “pink tide” during the 2000s was far less radical and focused more on popular mobilization and the redistribution of wealth. (Source: Ian Chalfon, “The Left Stuck on Repeat—a New Pink Tide in Latin America,” *The Political Economy Review*, 2021.)

concept of the pure people: all those who are excluded and discriminated against”¹²⁴, making the classification of a pure people as general as possible to include the greatest number of citizens, while still establishing an enemy. They claim that their countries have been governed by a “fraudulent establishment” that has tilted the scales in their own favor, and the time has finally come to give the power “back to the people”.¹²⁵

The populist governments of this era can all be identified as socialist, but socialism was not necessarily the intent or objective for these leaders. The socialist-era populists did not run on a campaign promoting Marxism or directly identify themselves as revolutionaries, rather they used socialism as a framework. Populism during this era is combined “with heavier doses of nationalism, socialism, and a charismatic style of political mobilization.”¹²⁶ The main objective of the era was to re-distribute wealth and power amongst the exploited classes and condemn the system that had allowed for this inequality to flourish for so long. Roberts writes, “in the aftermath to the 1980s debt crisis, the demands of economic stabilization and the weakening of historic labor movements had marginalized political actors committed to redistributive policies.”¹²⁷ The populists claimed that globalization and the global capitalism that the neo-liberals had promoted at the end of the 20th century only made Latin America more dependent on foreign powers.

The nations did not see overwhelming benefits under the previous era of populists, and the new-age leaders claimed that the cause was in the enemy.

The change in Latin America has been driven by massive protests involving general strikes, sometimes violent uprisings... by 2006, these protest movements brought to power new left-of-center governments in several countries... this period came to power by opposing, at least nominally, the free-market policies

¹²⁴ Mudde, *Populism: A Short Introduction*, 32

¹²⁵ Ibid, 32

¹²⁶ Roberts, "Populism and democracy in Venezuela under Hugo Chávez", 144

¹²⁷ Ibid, 137

pushed upon them by the United States and the world financial institutions- the IMF, World Bank, and WTO.¹²⁸

While the oligarchy maintains a monopoly over the region's success, the people cannot succeed. For the region and the pure people to thrive, Latin American nations would have to rely more on themselves and less on the demands of foreign governments. The answer was not to completely eradicate capitalism, but rather to shift the focus from outwards to an inward-oriented, state-led nation.¹²⁹ The socialist-era populists rejected the privatization of social services and economic strategic sectors and defended the expansion of social programs.

The policies that the populists proposed were certainly socialist in nature, but symbolic nationalism was the primary source of ideological inspiration.¹³⁰ The key to a populist's success is their ability to mobilize the people, and to do so they need a unifying element that brings people together while simultaneously separating them from the "corrupt elite" group. During the socialist-era, identity was clearly the mobilizing factor, characterizing many of the populists in this period as "ethnopolitists". The ethnopolitist approach is not unique to this period of Latin American populism, as the example of Alberto Fujimori in 1990s Peru demonstrates. What sets ethnopolitism apart during this period, however, is the growing popularity of indigenous parties and indigenous mobilization.¹³¹ In a region with such ethnic and cultural diversity, identity politics is a very efficient tool that can be utilized to easily unite and divide society.

The new-age ethnopolitists connect to their community and present themselves as "insider-outsiders", meaning they are one of the pure people, but also an outsider to the established political system.¹³² They will adopt the *americanismo* ideology from traditional caudillo-era populists, but they reinvent and modernize it with a leader that the pure people can

¹²⁸ La Botz, "Latin America Leans Left: Labor and the Politics of Anti-Imperialism", 61-2

¹²⁹ Roberts, "Populism and democracy in Venezuela under Hugo Chávez.", 146

¹³⁰ Ibid, 145

¹³¹ Madrid, *The rise of ethnic politics in Latin America*, 1-2

¹³² Mudde, *Populism: A Short Introduction*, 73

more easily identify themselves with. The socialist-era populists are often mestizo or members of the Indigenous community themselves, so the symbolic representation of the traditional populists is transformed into a personalist experience for the people. Symbolic elements are useful to further authenticate the persona; they will often wear traditional indigenous garments, speak indigenous languages or at least promote the incorporation of the languages, and rely on nationally significant symbols or resources to connect with the native and mestizo people.¹³³ The fine line the populists must carefully trek is how to win the support of the minority communities while also appealing to the white citizens as well, so inclusive strategies are incorporated to manifest a sense of *americanismo*.

Ethnopolitism certainly plays the most significant role in characterizing socialist-era populism, but economics is also a key feature in the “new-period” populist ideology. Each populist leader develops their own economic paradigms, and their policies vary depending on their level of socialism. The unifying economic agenda for all socialist-era populists, however, is their staunch anti-neoliberalism.¹³⁴ According to the populist rhetoric, the neoliberal model implemented by the prior generation of leaders was a failure, and if the lower classes were to benefit, a new model would be necessary. “By 1997, forty five percent of all Latin Americans lived in poverty, and in some countries, extreme poverty, characterized by malnutrition and the deterioration of health, affected twenty percent of the population.”¹³⁵

In addition to the impact the previous failed attempts at market-economies had on socialist-era populism, the anti-capitalist movement was also a result of the discovery of natural resources that made Latin America very appealing to the global economy.¹³⁶ Populists depicted

¹³³ Madrid, *The rise of ethnic politics in Latin America*, 27

¹³⁴ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 13-14

¹³⁵ La Botz, "Latin America Leans Left: Labor and the Politics of Anti-Imperialism", 64

¹³⁶ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 14

the resources as an opportunity for the American people to take back their popular sovereignty by not allowing foreign elites to manipulate their land. Natural resources are an important economic motivator just as they are culturally significant, so populists can easily employ them as a mobilizer. The relative abundance of resources combined with the failed economic policies of the previous governments allowed for socialist-era populists to introduce anti-neoliberalism economic policies that seemingly give more power to the people, and less to the capitalist elites.¹³⁷

Hugo Chávez, former president of Venezuela, is a prime example of a new-era Latin American populist. Born into a middle-class family, Chávez joined the military and began to climb the ranks quickly, kickstarting his political career in the early 1990s. Venezuela had been a relatively stable democracy since the 1950s, but the 1980s brought economic hardships just as it had to nearly every country in the region. Under the presidency of centrist Carlos Perez (1989-93), Venezuela turned to neo-liberal policies as was commonplace in Latin America at the time. Chávez, a military official unhappy with the increasingly disappointing economy and political representation, initiated an unsuccessful military coup in 1992 and was soon arrested¹³⁸. After his release, he traveled Latin America meeting with other revolutionaries and gaining support from socialist parties both domestic and abroad. In 1998 he won the presidential election and would serve as president in three different periods until his death in 2013.

Chávez' success lay in his persona; he was a military official who proved his dedication to the cause of his country's success. His campaign was populist in every aspect of the word. He divided Venezuelan society into two distinct groups,

[T]he ideology and discourse of *Chavismo* morally constructed an antagonistic duality between a virtuous 'people' (*el pueblo*) and an incorrigibly venal and corrupt elite (the oligarchy or, more

¹³⁷ Ibid., 14

¹³⁸ Roberts, "Populism and democracy in Venezuela under Hugo Chávez", 143

colourfully, the ‘rancid oligarchy’ in the parlance of *Chavismo*) ... with *el pueblo* unified by the leadership of Chávez, and the oligarchy defined by its adversarial status.¹³⁹

The clear enemy, according to Chávez, was the oligarchy and their economic and political monopoly over Venezuela. He claimed imperialist foreign governments, especially the United States, were exploiters who continuously took advantage of the natural resources that Latin America had to offer, and that, combined with internal government corruption at the hands of the elites, resulted in an economic crisis for the people. The elites were profiting off the pure people, and the political establishment and its mismanagement of the economy was to blame.¹⁴⁰

Venezuela has an abundance of gas reserves¹⁴¹ and according to Chávez, the country’s natural resources should be used to benefit the Venezuelan people, not the political elites. He pushed for anti-neoliberal economic policies and promoted social programs that would redistribute the wealth and power to benefit the pure people that he claimed had not been profiting off the natural richness of their land.

Chávez claimed that Venezuela needed change, and using the unifying concept *americanismo*, he referred to his movement as the Bolivarian Revolution. “Building on the prevailing anti-party feelings, and on views of democracy as social justice, participation and equality, Hugo Chávez promised an alternative model to representative democracy.”¹⁴² For a movement to be successful, he claimed, the people needed to play an active role in politics instead of an abstract form of political representation. He advocated for direct democracy, encouraging the people to mobilize because it was the only way to give the power back to the people. Article 62 of the 1999 Constitution even states explicitly, “todos los ciudadanos y

¹³⁹ Ibid., 136

¹⁴⁰ Ibid., 142

¹⁴¹ In 2004, Venezuela was “home to the Western Hemisphere’s largest conventional proven oil reserves, at 77.8 billion barrels” and it was “among the top ten crude oil producers in the world”. (Source: U.S. Energy Information Administration, “Venezuela Country Analysis Brief,” *U.S. Energy Information Administration – EIA*, 2005)

¹⁴² De la Torre, “In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador”, 30-31

ciudadanas tienen el derecho de participar libremente en los asuntos públicos, directamente o por medio de sus representantes elegidos o elegidas.”¹⁴³

The encouraged popular mobilization was two-pronged; while it did galvanize the people to participate, it also secured his radical agenda, thereby protecting his own power.¹⁴⁴ Populists are by nature anti-institutional, and they will typically use the support of the people to justify their policies. Chávez often used referendums to get the people's direct opinion in a rebuke to the political establishment. If the opposition-controlled Congress opposed a bill or law presented by Chávez, the referendums could be used to exonerate his decisions, and he would claim that Congress' hostility is the “corrupt elite” trying to deny the people their rights.

Chávez' anti-establishment rhetoric became more radical as his presidency progressed. In 1999, Chávez held a referendum to draft a new constitution, and it was passed by an overwhelming majority of 71 percent of Venezuelan voters.¹⁴⁵ By using a popular referendum to authorize the Constitution, Chávez cleverly manipulated the democratic mechanisms to secure his position and breakdown the system. The new constitution strengthened the executive branch, weakened the system of checks and balances, and while it recognized the role of referendums in the exercise of popular sovereignty, it simultaneously undermined democratic contestation by attacking opposition groups.¹⁴⁶

The power was highly concentrated with the president, and without a functioning system of institutional checks and balances, there were no provisions in place to control this power.¹⁴⁷ “Chávez grabbed power, reduced the spaces for contestation, and used a populist discourse to

¹⁴³ Constitución de la República Bolivariana de Venezuela (1999), Art. 62

¹⁴⁴ Roberts, “Populism and democracy in Venezuela under Hugo Chávez”, 148

¹⁴⁵ Ibid., 149

¹⁴⁶ Ibid., 149

¹⁴⁷ Ibid., 137

polarize society into two antagonistic camps.”¹⁴⁸ The re-writing of constitutions is a very common practice that can be found in nearly every example of socialist-era Latin American populism. Populist constitutions are used to diminish the power of the “elitist” system by breaking down the institutions that reinforce it and subsequently constrain the potential of competition.¹⁴⁹ Chávez’ constitution also extended term limits and gave the president the ability to dissolve congress, convoke referendums and control the military. He essentially dismantled the system and the institutionalized mechanisms of accountability, all while using the support of the people as his justification.

In 2012, Chávez won his fourth presidential election, but died on March 5, 2013 and was succeeded by Vice President Nicolas Maduro who still holds the office today, despite political turmoil after the 2019 election. In his four terms as president, Hugo Chávez demonstrated the power of populism in a nation. Popular mobilization increased dramatically under Chávez,¹⁵⁰ and the more support he gained, the more justifiable his anti-institutional policies and actions. Chávez skillfully prioritized different forms of popular sovereignty while simultaneously undermining the system of checks and balances, effectively dismantling Venezuela’s liberal democracy.¹⁵¹ The socialist era populism has shed light on the weakness in Latin American political institutions and Chávez’ Venezuela is a prime example of how quickly a liberal democracy can be altered.

¹⁴⁸ De la Torre, "In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador", 40

¹⁴⁹ Mudde, *Populism: A Short Introduction*, 32

¹⁵⁰ The 2012 Presidential election had a record-breaking voter turnout of 80 percent, and Chávez won with a 54 percent majority. (Source: William Neuman, “Chávez Wins New Term in Venezuela, Holding off Surge by Opposition,” *The New York Times*, October 7, 2012, <https://www.nytimes.com/2012/10/08/world/americas/venezuela-presidential-election.html>.)

¹⁵¹ Roberts, “Populism and democracy in Venezuela under Hugo Chávez”, 154

Chapter 3

A Case Study of Bolivia Under Evo Morales

3.1 A Brief Overview of Bolivia

3.1.1 Bolivia's Political History

Although political phenomena like populism can be analyzed from a macro or regional level, each country has a unique history and socio-cultural makeup, so it is important to evaluate them at the national level as well. In the Latin American context, Bolivia is a very diverse country with a complex political history, making it a particularly fascinating case study. Bolivia is the Latin American nation with the largest population of indigenous peoples, with more than thirty-five official indigenous languages recognized and actively spoken, some even dating back to the pre-Incan period.¹⁵² Many of the Bolivian people identify as indigenous or mestizo, making it a complex amalgam of ethnicities and centuries-old cultures, setting Bolivia apart as an exceptional case of indigenous resistance.

Bolivia's history dates back at least twelve thousand years and it was home to many different civilizations.¹⁵³ The two biggest and best-known kingdoms in the pre-Hispanic period were the Aymara and Inca empires, both were fully advanced civilizations with their own institutions and laws. These empires had leaders, class structures that determined the roles of individuals in society, and fully developed non-market economies.¹⁵⁴ When the Spanish arrived in South America in the early 16th century, they found a land of opportunity and new untapped

¹⁵² Charles W. Arnade and Peter J. McFarren, "Bolivia," *Encyclopedia Britannica*, 2021, <https://www.britannica.com/place/Bolivia>.

¹⁵³ Herbert Klein, *A concise history of Bolivia*. (Cambridge University Press, 2011), 10

¹⁵⁴ *Ibid.*, 15

resources. Spanish colonizer Francisco Pizarro and his men took over the Incan empire in 1533, assassinated the emperor, Atahualpa, and massacred many of the indigenous people.¹⁵⁵ This was the beginning of the colonial society in the Viceroyalty of Peru¹⁵⁶, and the Spanish domination would last 300 years.

More than three centuries of colonization had an obvious impact on Latin America's society, culture, economy, and political development. While many indigenous peoples and whole tribes were nearly eradicated by the European colonizers due to foreign diseases or maltreatment, Bolivia's indigenous population remained surprisingly resilient. The mountainous terrain was difficult for the Europeans to navigate, allowing small tribes of indigenous people to congregate discretely and essentially escape the colonial rule down below. Nevertheless, the colonial society created a new caste and class system in the region, where indigenous people and black slaves were at the bottom and the European settlers, and their descendants, were at the top.

The battle for independence in Bolivia began nearly one hundred years before sovereignty was attained. A number of indigenous rebellions broke out in the 18th century, the most famous being the 1780 rebellion led by Tupac Amuru II, an educated member of the Incan nobility.¹⁵⁷ Unlike the rebellions in other regions of Latin America, the Bolivian and Peruvian rebellions were centered on a sense of pan-Andean nationalism, and the desired objective was full restoration of indigenous rights and power over the land.¹⁵⁸ Aside from domestic revolts, political turmoil and uncertainty in Europe facilitated the independence movements in Latin America. By

¹⁵⁵ Ibid., 29-30

¹⁵⁶ The Viceroyalty of Peru was the imperial territory belonging to the Spanish crown. The borders of the territory changed throughout the centuries as Spanish expansion of the continent evolved, but the original 1542 Viceroyalty's borders covered parts of modern-day Peru, Bolivia, Chile, Argentina, Uruguay, Paraguay, Ecuador, Colombia and Panama. By the mid 18th century, the borders were rearranged, creating the Viceroyalties of New Granada and Rio de la Plata. (Source: Anandaroop Roy, "Viceroyalty of Peru – Mapping Globalization," *Princeton University*, n.d., <https://commons.princeton.edu/mg/viceroyalty-of-peru/>.)

¹⁵⁷ Waltraud Q. Morales, *A brief history of Bolivia*, (New York: Facts on File, 2003), 36

¹⁵⁸ Ibid., 37

the turn of the century, the region was fighting for full autonomy from Spain and Portugal. The Viceroyalty of Rio de la Plata, which had gained jurisdiction over the Viceroyalty of Peru, declared independence in 1810, but the “Upper Peru” region was still unsatisfied. After fighting independent Argentina in the 15 years’ war (1810-1825), Bolivia was also declared an independent nation on April 9, 1825.¹⁵⁹

Bolivia’s political hardships did not end when independence was won, however, and the next few decades saw various obstacles, wars, and revolutions. The Pacific War from 1879-83 was a territorial dispute between Bolivia, Peru, and Chile where Bolivia lost all its water access, making it completely landlocked. This had a significant impact on Bolivia’s economic opportunities, forcing the country to resort to different trade and peace deals, and straining the relationship between Bolivia and Chile. Bolivia’s economic struggles worsened, and in 1932 the country entered the Chaco War with neighboring Paraguay. The war was another territorial dispute, this time between two land-locked countries who struggled in their own right after losing significant territory in 19th century wars. It was one of the bloodiest battles in South American history¹⁶⁰, and as a result Bolivia lost most of the disputed Gran Chaco region. In fifty years, Bolivia was defeated in two major wars and forcibly forfeited much of its land, creating a hostile political situation.

Arguably one of the most important occurrences in Bolivia’s political history was the 1952 Revolution. The candidate Victor Paz Estenssoro of the Nationalist Revolutionary Movement party (*Movimiento Nacionalista Revolucionario*, or MNR) won the 1951 election against then residing president General Urriolagoitia. Urriolagoitia, with the support of the

¹⁵⁹ Ibid., 44

¹⁶⁰ Uruguayan journalist Eduardo Galeano described the war best when he wrote, “*Están en guerra Bolivia y el Paraguay. Los dos pueblos más pobres de América del Sur, los que no tienen mar, los más vencidos y despojados, se aniquilan mutuamente por un pedazo de mapa. Escondidas entre los pliegues de ambas banderas, la Standard Oil Company y la Royal Dutch Shell disputan el posible petróleo del Chaco.*” (Source: Eduardo H. Galeano, “La guerra del Chaco” in *Memoria del fuego, vol. 3: El siglo del viento*. (España Editores, 2010), 113)

country's military, formed an opposition *junta* government, sparking outrage and a number of violent revolts. In April of 1952, the MNR overthrew the military junta government, initiating the Bolivian National Revolution.¹⁶¹ The Bolivian Revolution was supported by peasants and indigenous farmers who saw it as an opportunity to free themselves from the repressive, elitist governments of the post-independence era.

The MNR ran on a campaign that sought to “recover the nation” by condemning the imperialist oligarchy for profiting off the enslavement of the “oppressed majority”.¹⁶² They claimed to be a party dedicated to unifying people from the lower socio-economic classes against a common enemy: the internalized colonial system. They proposed reforms that they claimed would improve Bolivian society and make the system more equitable, including universal suffrage, the nationalization of the biggest mining enterprises in Bolivia, and agrarian reform which would redistribute land more equitably and eradicate the *latifundia* system of agriculture.¹⁶³ This campaign promise attracted many Bolivians from the formerly neglected sectors of society, and after the 1952 Revolution, “power passed into the hands of new groups, including an emerging middle class... and the Indian population, which for the first time acquired a considerable measure of economic independence.”¹⁶⁴

Despite the MNR's original “revolutionary nationalism” discourse, by the 1960s, the MNR had taken a fatally different turn; the party began aligning itself with the Bolivian military and the U.S. government, resulting in dissatisfaction amongst the people and left-leaning supporters.¹⁶⁵ In his 2001 publication, Professor Stephen Zunes wrote,

¹⁶¹ James V. Kohl, "Peasant and Revolution in Bolivia, April 9, 1952–August 2, 1953," *Hispanic American Historical Review*, (1978), 238

¹⁶² Sven Harten, *The rise of Evo Morales and the MAS*. (Bloomsbury Publishing, 2011), 19-20

¹⁶³ Charles Weston, “An Ideology of Modernization: The Case of the Bolivian MNR,” *Journal of Inter-American Studies* 10, no. 1, (1968), 85.

¹⁶⁴ *Ibid.*, 85

¹⁶⁵ Morales, *A brief history of Bolivia*, 161

The reality of a high level of dependency made it possible for the United States to steer the course of the revolution in a direction more favorable to its interests- a move facilitated by the MNR's predominant middle-class orientation and the inability of its more radical factions to dominate it.¹⁶⁶

In 1964, a military coup displaced the ruling government after “the Paz government proved unable to deliver promised prosperity and justice and was forced from office”.¹⁶⁷ The period between 1964-1982, known as the Counterrevolution, was a time of political unrest in the nation, with multiple coups taking place to depose leaders undemocratically.¹⁶⁸ “This left the army to exercise power- through five coups and four General- Presidents- between 1964-1978.”¹⁶⁹ The country had periods of economic stability and instability during the dictatorship period, but the lack of political freedom resulted in civil unrest and turmoil.

After violent protests, Bolivia officially became a democracy in 1982 with the return to power of former MNR president Hernán Siles Zuazo. This period is officially considered the start of Bolivian democracy, but some scholars debate the semantics of whether or not this period can truly be considered “democratic”. Regarding the 1982 government, Sven Harten writes,

Although some new institutions were established and explicitly anti-democratic leaders were removed, the transition to democracy brought little in the way of further participation by citizens in political decisions, with the exception of periodic elections. At that time, it appeared as if democratic shortcomings were not a priority for the majority of citizens, who wanted above all a government that was able to overcome the economic crisis.¹⁷⁰

Zuazo was, however, the first democratically elected government in eighteen years¹⁷¹, deeming 1982 Bolivia's return to democratic rule, albeit a fragile one.

¹⁶⁶ Stephen Zunes, “The United States and Bolivia: The Taming of a Revolution, 1952-1957.” *Latin American Perspectives* 28, no. 5, (2001), 47.

¹⁶⁷ Christopher Mitchell, “The New Authoritarianism in Bolivia,” *Current History*, (1981), 75

¹⁶⁸ Morales, *A brief history of Bolivia*, 163

¹⁶⁹ Mitchell, “The New Authoritarianism in Bolivia”, 75

¹⁷⁰ Harten, *The rise of Evo Morales and the MAS*, 25

¹⁷¹ Juan Antonio Morales and Jeffrey D. Sachs, “Bolivia's Economic Crisis,” *Developing Country Debt and the World Economy*, (1989), 69.

3.2 The Rise of the MAS Party

The *Movimiento al Socialismo* (MAS) party in Bolivia was officially established in 1995 and was first elected to Bolivian parliament in 1997. Evo Morales himself described MAS as “the political instrument of the social movements”, not a political party.¹⁷² In fact, the official name of the party is *Movimiento al Socialismo- Instrumento Político por la Soberanía de los Pueblos*, or Movement for Socialism–Political Instrument for the Sovereignty of the Peoples, although it is most commonly referred to as MAS. MAS was the creation of union leaders who represented poor, indigenous coca farmers, and this base remains strong today. Unsatisfied with the MNR party, leaders of the community decided to form a new organization constructed and methodized by the people, rather than representatives that they felt did not accurately speak for them.

Much of the MAS discourse was very similar to that of the MNR party, but MAS presented itself as the radical alternative for a party that had essentially missed the mark. “MNR’s nationalism was thus a source of inspiration for the discourse of MAS, with the ironic twist that MAS identified the MNR itself with ‘the oligarchy’ and ‘imperialism’.”¹⁷³ The United States influence on the MNR party and its policies, combined with the perceived government inaction, led to distrust in the party. MAS argued that, while the MNR had an attractive campaign, the reality did not reflect the intentions. Land reform, for example, was one of MNR’s biggest campaign promises, but the party often failed to see the program through unless essentially forced by protests. “While some of the most important MNR leaders genuinely supported land reform in principle, the MNR undertook this radical measure only under the pressure of events beyond its control.”¹⁷⁴

¹⁷² Harten, *The rise of Evo Morales and the MAS*, 82

¹⁷³ *Ibid.*, 20

¹⁷⁴ Weston, “An Ideology of Modernization: The Case of the Bolivian MNR”, 98

There had also long been a disconnect between the party and the indigenous communities, especially those working as coca farmers. The Bolivian indigenous communities expected to reap the benefits of the revolution, but the newly established system did not actively propose any plans or changes to encourage the development of indigenous communities, leaving them to suffer further economic and social inequalities.¹⁷⁵ Additionally, the MNR promoted an assimilationist model, which encouraged that the Bolivian population be assimilated into one, homogenous national culture with a single identity.¹⁷⁶ Under this model, Bolivia would be constructed according to a Western image, essentially adopting the same neo-colonialism that the party argued against.

The foundation of the MAS party lies in the Bolivian farmers unions. The coca grower's movement began in the 1950s as an organizational campaign to bring farmers together and establish unions which would regulate land distribution and cultivation.¹⁷⁷ Local landowners and migrants would come together and form a union, working to protect the land and protect their rights to cultivate coca responsibly. These unions quickly became a sovereign power within the local communities with their own bottom-up social structure and they essentially acted as a local government. They would develop infrastructure, build schools and hold community-wide meetings where migrants and landowners alike could come together and talk freely about their grievances and/or suggestions.¹⁷⁸ By the late 1980s, the coca grower's movement had spread across the rural farming communities all over Bolivia, which prompted the creation of the MAS party.

¹⁷⁵ Harten, *The rise of Evo Morales and the MAS*, 22

¹⁷⁶ *Ibid.*, 21

¹⁷⁷ *Ibid.*, 48

¹⁷⁸ *Ibid.*, 52

3.2.1 The Significance of Coca

Coca is a key element at the foreground of MAS' success, and it is essential to Bolivia's culture, politics, and economy.¹⁷⁹ Culturally, the coca plant has been a staple in the Andean region since the arrival of man to the land. Aside from its cultural and ceremonial importance, the "sacred leaf" has significant nutritional and medicinal functions; it has been used for centuries by native Andeans as a remedy for many ailments, especially for altitude sickness.¹⁸⁰ During the Spanish Colonial period, the natives used coca to cope with the extreme forced labor of working long hours in the mines as it helped combat extreme temperatures and starvation.¹⁸¹ The cultural significance of coca has made it a symbol of Bolivia's history and community. The plant represents the connection between the native people and *Pachamama* (Mother Earth) and is used in many religious and cultural ceremonies.¹⁸²

Unfortunately, coca also symbolizes something darker which has left it with an unfavorable reputation: cocaine. When coca undergoes a chemical production, it can be utilized to make cocaine, one of the most valuable trafficked illegal substances in the world. For this reason, the United Nations included coca on its list of illegal substances and it has been banned in most countries.¹⁸³ The United States' "War on Drugs" was an anti-drug campaign that attempted to stop the trafficking of illegal substances by eradicating the supply; the U.S. defined coca producers as drug traffickers and essentially terrorists, making the case for coca workers that much more difficult.¹⁸⁴ While there is nothing that inherently links the coca farmers to the

¹⁷⁹ Ibid., 53

¹⁸⁰ The Andean region is mountainous with altitudes upwards of 8,000 feet. Coca leaves can be chewed, or they can be used to make teas and made into candy that people will consume to assist with sickness brought on by the high altitudes. While the practice has been commonplace among the natives in the Andes for centuries, coca products are regularly given to tourists who are unaccustomed to the elevations.

¹⁸¹ Morales, *A brief history of Bolivia*, 223

¹⁸² Harten, *The rise of Evo Morales and the MAS*, 25

¹⁸³ Ibid., 26

¹⁸⁴ Ibid., 32

production or trafficking of cocaine because there is “no evidence that the peasant producers are involved in organized crime”,¹⁸⁵ coca still carries a negative stigma and with it, a bad reputation for Bolivia.

The majority of the MAS party’s members are indigenous and/or peasant farmers, so understandably coca plays a huge role in their development. MAS has taken a stand with the Bolivian coca farmers, maintaining that the plant can be used legally and responsibly, thus sustaining the livelihood of many peasants who depend on the cash crop.¹⁸⁶ MAS’s pro-coca stance has been a blessing and a curse: on one hand, understanding the cultural and economic significance of coca allows MAS to connect to the people, especially the poor, indigenous communities who hold the plant near and dear; but on the other hand, the global perspective sees the stance as highly controversial and negative to Bolivia’s already feeble image. Ironically, the controversy of coca is seen as a benefit to MAS, because the party claims that the true Bolivian people understand the significance behind coca cultivation, and all those that cannot recognize this truth are elitists.

3.2.2 The Structure of MAS

MAS’ structure mirrors the organization of the farmer’s unions that formed the party. When MAS was created, there was no independent party organization that separated it from the coca producers’ unions and the leaders of the unions were the founders of the party.¹⁸⁷ The division of power is bottom up, and the concept of a hierarchy differs slightly than it would in traditional party politics. The unions have an array of leadership positions, and the roles are

¹⁸⁵ Willem Assies, and Ton Salman, *Crisis in Bolivia: The Elections of 2002 and Their Aftermath*. (London: University of London, Institute of Latin American Studies, 2004), 36.

¹⁸⁶ Harten, *The rise of Evo Morales and the MAS*, 30

¹⁸⁷ *Ibid.*, 89

constantly changing, giving many members of the community the opportunity to participate.¹⁸⁸

MAS follows the same structure, allowing all members of the community the opportunity to rise in rank and serve as a leader.

The coca unions also held regular assembly meetings, allowing members of the community to voice their opinions and grievances freely. There are no time limits on these assembly meetings, allowing everyone to speak for as long as they please, meaning the meeting could take anywhere from three hours to three days.¹⁸⁹ MAS has adopted this direct democracy model in their party structure, frequently holding meetings in conjunction with the unions and listening to the communities. The direct democracy structure of the unions, and eventually MAS, encourages the support and participation of the people.

Harten writes that “participation, deliberation and consensus are regarded as the main factors behind the voluntary support of the grassroots, because decisions are the result of a social process through which people become the ‘owners’ of the organizations”¹⁹⁰, meaning the participation of the people is a form of incentive. By voicing their opinions at assembly meetings, the people essentially manage the movement and, with enough support, play an active role in its direction. The perks of MAS being an official, organized political party, is that the assemblies do not stop there; local MAS leaders can bring these grievances to the national level and make real changes. The constant communication between the common people and the party leaders is a core element to MAS’ structure, and it’s one of the main reasons the party has had such support.

The success behind MAS is undoubtedly its clever ability to mobilize. As Morales himself said, MAS is an instrument of social movements¹⁹¹, meaning the people are the guiding force

¹⁸⁸ Ibid., 55

¹⁸⁹ Ibid., 57

¹⁹⁰ Ibid., 41

¹⁹¹ “Social movements are defined as networks of informal interactions between a plurality of individuals, groups and/or organizations, engaged in political or cultural conflicts, on the basis of shared collective identities.” (Source: Mario Diani, “The Concept of Social Movement,” *The Sociological Review* 40, no. 1, (1992), 3)

behind MAS' functionality and success. Social movements rely on individuals, organizations, or coalitions to organize behind a common identity. This collective identity mobilizes the group to band together and initiate campaigns to insight political action.¹⁹²

Initially, MAS was more a federation of social organizations than a political party; members came from workers' and small farmers' unions, village committees, and indigenous communities, a guarantee that it represented the working class in a country that has a dense network of social organizations covering every aspect of life. This structure produced "corporatist democracy": By bringing together diverse organizations, MAS could get its members to turn out to vote, and also mediate among a growing number of constituent organizations.¹⁹³

That special fusion of political party status combined with social movement structure is what sets MAS apart.¹⁹⁴ In Harten's words, "the success of this 'political institution' can be explained by its idiosyncratic characteristics, which include... having one foot inside official institutions, and the other outside them."¹⁹⁵ MAS' ability to stay true to the social movements while maintaining institutional prestige is how the party retains support. MAS is more than a party; it is a grassroots campaign that has been able to formalize its organizational structure and form a party; but the grassroots foundation still stands, nonetheless.

Impressing enough, Bolivia is the only case in Latin America where a political organization formed directly by social movements captured state power through democratic elections after a series of protests.¹⁹⁶ In other words, no other Latin American grassroots organization has seen such political success as MAS, demonstrating the power of efficient mobilization. The party has a clear discourse which creates a common identity and makes the prospect of social mobility more viable. MAS was established as a party of and for the peasant

¹⁹² Charles Tilly, *Social movements, 1768-2004*. (Boulder: Paradigm, 2004), 3-4.

¹⁹³ Hervé do Alto, "How Evo Morales Stays in Power," *The Nation*, August 30, 2018, <https://www.thenation.com/article/archive/evo-morales-stays-power/>.

¹⁹⁴ Harten, *The rise of Evo Morales and the MAS*, 91

¹⁹⁵ *Ibid.*, 82

¹⁹⁶ Santiago Anria and Evelyne Huber, "The Key to Evo Morales' Political Longevity: Why He's Outlasted Other Latin American Left-Wing Leaders," *Foreign Affairs*, (2018)

farmers, coca producers and indigenous and mestizo communities. The leaders and founders of MAS are leaders of the coca unions and well-known members of their communities, making them easily relatable and trustworthy.

While the party may be very successful in mobilizing its constituents, it has also struggled with securing the trust of the common people. From the indigenous and peasant perspective, party politics have never represented them or their grievances. Most parties, even the MNR, were led by wealthy caudillos that claimed to speak for the people but fell short when it came time to change. In the 1990s, Bolivia was simultaneously undergoing an economic crisis and a crisis of representation, leaving many citizens feeling dejected with little faith in the political system. MAS was tasked with the challenge of convincing the people that their party would not be an instrument of control as the others had been, but rather an instrument of the people.

The party pushed for institutional reforms, especially in land distribution and education, but it was the visual representation that mobilized the people. “In contrast to the traditional parties, much of the MAS’ leadership, including Evo Morales, was indigenous as were many of the party’s candidates for the legislature.”¹⁹⁷ Seeing people in leadership positions that were members of their own community encouraged the popular interest and made representation less symbolic and more realistic. But it was MAS’ dominance through Evo Morales’ election win in 2005 that really secured the party’s position and prosperity, and he quickly became the face of the party.

¹⁹⁷ Raúl L. Madrid, “The Rise of Ethno-Populism in Latin America: The Bolivian Case,” *World Politics* (2008), 16

3.2.3 The Structure of the Bolivian Political System

It is also useful to present an explanation to the Bolivian System as it is laid out in the Constitution. Bolivia, officially recognized as the Plurinational State of Bolivia (*Estado Plurinacional de Bolivia*), has adopted “la forma democrática participativa, representativa y comunitaria”¹⁹⁸ of governing. The country is divided into nine departments, and the official capital of the country is Sucre, although La Paz serves as the administrative capital.

The government is composed of four ruling branches, each individual and separate from the other, but with the fundamental intention of cooperation; the Legislative, Executive, Judiciary, and Plurinational Electoral branches.¹⁹⁹ The Legislative branch is divided into two chambers: the Congress, made up of one hundred thirty members, and the Senate, made up of thirty six members.²⁰⁰ The Executive branch is composed of a President, who serves as the Head of State, a Vice-President, and various departmental heads.²⁰¹

The Supreme Court is the highest court in the land and it serves as the head of the judiciary branch, and the smaller, local courts located in each of the nine departments only have jurisdiction in their respective areas.²⁰² The last branch is the Electoral branch, or the *Órgano Electoral Plurinacional* (OEP), which is an independent branch made up of a Supreme Electoral Court, and smaller, departmental courts, similar to that of the Judiciary.²⁰³ The OEP is specifically responsible for the monitoring of elections in Bolivia and it is the official headquarters for any and all information on Bolivian election results.

¹⁹⁸ Constitución Boliviana, Art. 11.1

¹⁹⁹ Ibid., Art. 12.1

²⁰⁰ Ibid., Art. 145-148

²⁰¹ Ibid., Art. 165

²⁰² Ibid., Art. 181

²⁰³ Ibid., Art. 205

3.3 The Rise of Evo Morales

3.3.1 Humble Beginnings

The story of Evo Morales, first indigenous president of Bolivia, is both captivating and groundbreaking. Juan Evo Morales was born on October 26, 1959, in the Aymara village of Isallwai in the Altiplano region of Bolivia. While the family was primarily llama herders, Morales' parents were poor farmers who often had to migrate in search of work, traveling from the village to Cochabamba daily, and sometimes spending months at a time in Argentina working sugar cane fields or any odd-end jobs they could acquire. Morales joined the Bolivian army in 1978, and after serving as a conscript for two years, he moved back to his village to assist his parents. Unfortunately, a severe drought in 1980 ruined most of the crops in the Altiplano region and killed the animals, forcing the family to move to the Tropic of Cochabamba, along with many other peasant workers in the region. There, the family cultivated a range of cash crops, including coca plants.²⁰⁴

Evo Morales' move to Cochabamba remains to be one of the most influential moments in his political career. Although he and his family were forced to move away from their Altiplano home, Cochabamba was also home to many indigenous Aymara people and peasant farmers in a very similar situation. It was here that Morales began his activist career after working as a coca farmer and being exposed to the region's successful farmers unions. Many of Morales' ideas, and eventually the legislation his government put in place, were developed here, especially his pro-coca stance. He quickly became a member of the coca grower's union, and Morales' political progress and the coca producers movement developed together.²⁰⁵

²⁰⁴ Madrid, "The Rise of Ethno-Populism in Latin America: The Bolivian Case", 35-39

²⁰⁵ Ibid., 41

3.3.2 The Revolutionary Poster Child of MAS

Considering Evo Morales' extensive involvement in the coca unions, it should come as no surprise that he had a crucial role in the development of MAS. A political party was the perfect opportunity for the unions to institutionalize and take their movement to the next step, and Morales had much to do with its evolution. It was clear that the traditional parties had little support among indigenous people and farmers and the Bolivian people felt they were not being accurately represented, so naturally MAS emerged as an "alternate-party". Morales and other leaders of the party had to make it clear that MAS was not another political party looking to maintain the status quo; it was a revolution.

Using the failures of the previous governments and the disconnect between the parties and the common Bolivian people, Morales was able to shape the MAS party as the answer to the people's dissatisfactions. For example, the MNR government passed education and land reform bills with the intent to highlight Bolivia's multicultural society and provide the indigenous communities with more opportunities.²⁰⁶ These reforms were a step in the right direction, but according to Morales and the MAS party, they were nothing more than symbolic. The land reform bill gave land titles to indigenous people, but it completely ignored the indigenous cultural practice of communal living and society.²⁰⁷ The educational reform of 1994 symbolically recognized the aymara and quechua languages, but there are more than thirty indigenous languages spoken across the country that were completely disregarded in this bill, which Morales would later officially recognize in his 2009 Constitution.

²⁰⁶ The "Reforma Agraria" was a land reform bill passed in 1953 and then reviewed and amended in 1996, as an attempt to equalize the distribution of land in Bolivia amongst the social classes. The phrase "la tierra es de quien la trabaja" was coined as the motto for the bill, meaning the land belongs to anyone that works it. The "Ley de Reforma Educativa " was passed on July 7, 1994, with the intent to modify the Bolivian education system. In sum, this law legally recognized the Aymara and Quechua (Incan) languages and the introduction of bilingual education, while still maintaining Spanish as the official and primary language of the state.

²⁰⁷ Harten, *The Rise of Evo Morales and the MAS*, 105

It was Morales' controversial pro-coca stance that gave him the reputation as a revolutionary leftist, but this position also secured his loyal following. As a leader in his local coca unions, Morales understood the significance of the sacred plant to his fellow native Bolivians and saw it as an opportunity rather than a threat to his prosperity, and the success of MAS. He not only supported the coca unions, but he openly encouraged the cultivation of coca plants as an economic and cultural necessity. This resulted in a lot of backlash from the global community: during a speech in 2002, "the US ambassador, Manuel Rocha, 'reminded' Bolivians that a vote for Evo Morales, 'a person with links to drug traffic', could result in the cessation of all US aid to Bolivia".²⁰⁸ Ironically, the resistance to Morales' support for legalizing coca only seemed to give him more support amongst the locals. Bolivian society was clearly becoming divided into two groups: those in favor of MAS and the contentious pro-coca proposal, versus those who thought the cultivation of coca to be contentious at all.

Evo Morales ran for president the first time in 2002 representing the MAS party. In his presidential campaign, Morales promised to end the U.S. ban on coca production altogether and renationalize private enterprise.²⁰⁹ Morales lost the election, but alarmingly not by much; he finished in second place, trailing behind President Gonzalo Sanchez de Lozada by a mere two percent.²¹⁰ From 2002 on, MAS' support began to grow rapidly, and Evo Morales became the revolutionary poster child for the party. Many Bolivians saw his bold stance on coca and his anti-United States discourse to be a testament to his dedication to the Bolivian people and culture, not a pawn of the foreign elites.

²⁰⁸ Ibid., 87

²⁰⁹ Morales, *A brief history of Bolivia*, 224

²¹⁰ Órgano Electoral Plurinacional, (2002).

MAS volunteers began to travel to other departments and form alliances with unions, organizations and social movements dedicated to their cause.²¹¹ The leftist rhetoric appealed to Bolivian socialist intellectuals, and Morales' personality continues to draw support, especially from the indigenous communities. As an Aymara migrant farmer with roots in the Tropics of Cochabamba, the indigenous people felt that Morales was a familiar face that they knew and could trust. He took to the streets and personally traveled to different departments and met with farmers, union leaders and local activists. Although he faced criticism for his revolutionary anti-system campaign, Morales used the criticism as a tool to appeal to the people, claiming that these critiques were elitist attempts to discredit him. He called attention to these criticisms in a 2006 speech: "que Evo es asesino, Evo es narcotraficante, Evo es terrorista. Yo dije ese momento, me están expulsando pero voy a volver con 30, 40 parlamentarios, si es posible con 70, 80. Lo que dije un día en el 2002 se ha cumplido."²¹² Morales may have lost in 2002, but his perseverance paid off in the next election.

3.3.3 Bolivia's First Indigenous President

Evo Morales became the eightieth President of Bolivia on January 22, 2006, following his victory in the 2005 presidential election.²¹³ His first public appearance after winning the election was as symbolic as his triumph:

Television pictures around the world would later show Morales surrounded by the masses, embracing indigenous women wearing the traditional bowler hat and multilayered skirt. But Morales's first public appearance was not in La Paz or in El Alto, but on the small square outside the dilapidated building of the Seis Federaciones del Trópico de Cochabamba (the union of the coca producers). Here, so close to his

²¹¹ Morales, *A brief history of Bolivia*, 87

²¹² Evo Morales, *Discurso de Posesión del Presidente Constitucional de La República, Evo Morales Aima*, 2006, 13

²¹³ Evo Morales won the election with 53.7% of the votes, trailed far behind by Jorge Quiroga of the PODEMOS party who received 28.6% of votes. The election had nearly 85% voter participation. (Source: OEP, "Estadísticas Electorales: Voto en las Elecciones Nacionales 2014.")

political roots, the taste of victory was sweetest, while the familiarity of the location seemed to offer him strength and security for the challenges ahead.²¹⁴

Morales was a president of the Bolivian people, and his 2005 success was met with both high hopes and reluctance. His campaign was based on a political-outsider persona ready to challenge the establishment and give the power to the people. This radical discourse inspired his supporters and simultaneously unnerved his critics, especially those in favor of traditional party politics. Morales made it clear his presidency would not be western, but rather Bolivian.

While his leftist discourse made him an appealing candidate to his voters, identity politics had the most significant impact on Morales' success. It is impossible to discuss Evo Morales without acknowledging his Aymara identity and recognizing the significance behind his victory. Bolivia is the country with the greatest percentage of indigenous peoples in Latin America²¹⁵; they are the clear majority, yet they are hardly represented in Bolivian politics. The Aymara people have resided in the Andes region for nearly 1,000 years, and yet, Evo Morales is the first native person to hold an executive position despite Bolivia being a sovereign nation since 1825. He utilized this imbalance of representation as a call to action for the indigenous communities to mobilize and support him in the fight. His victory in the general election was portrayed as an act of decolonization and a historic advancement for the disenfranchised. After winning the 2005 election, Morales would not simply be known as Bolivia's eightieth President, but rather as Bolivia's first indigenous president, which is undeniably more powerful.

²¹⁴ Harten, *The Rise of Evo Morales and the MAS*, 177-178

²¹⁵ Arnade and McFarren, "Bolivia."

3.4 The Development of Evo Morales' Populism

“Cuando uno trabaja por el pueblo, este pueblo te defiende.”

(Evo Morales, 2016)²¹⁶

Evo Morales' rise to power can be portrayed two ways: he was an indigenous leader who, with the help of his political party and support of the people, climbed the ranks and became president; or he was a populist leader who utilized his ethnic identity and a political narrative associated with it to gain power and become president. It is my judgment that both portrayals are true and codependent. How Evo Morales and the MAS rose to power is clear, but the reason behind their success is much more important.

3.4.1 The Role of Ethnopolitism

“Encima de cocaleros, somos Aymaras, Quechuas, Guaraníes; dueños de esta noble tierra. Dueños de este territorio.”

(Evo Morales, 2005)²¹⁷

It should go without saying that much of Evo Morales' success is a direct result of ethnic populist politics. He is a member of the Aymara tribe, one of the biggest and longest standing indigenous groups in the Andean region, and his cultural identity allowed him to connect with the large indigenous community in the country. Professor Miguel Buitrago writes, “uno de los principales capitales políticos de Evo Morales fue poseer una historia con la cual una gran parte

²¹⁶ Iásonis P. Velasco, *Un Día Con Evo Morales: Un Documental*, (YouTube, 2016), 14:02.

<https://www.youtube.com/watch?v=3CXEz1VvZSQ>.

²¹⁷ Quote by Evo Morales during his acceptance speech in Cochabamba, 2005.

(Source: *Cocalero*, directed by Alejandro Landes. (Karma Films, 2007), 54:34.

<https://www.youtube.com/watch?v=EbyOvB3ZzmM&t=1418s>).

de los bolivianos pueden identificar.”²¹⁸ Morales knew that to connect best with the indigenous and mestizo Bolivian people, he would have to make it his central strategy.

It is important to note that Morales did not start the indigenous-centered-ethnic politics in Bolivia or Latin America politics, though he is certainly the most successful product of it. Indigenous mobilization and politics have been active since the native-led rebellions of the late eighteenth century. After the 1952 Revolution, indigenous-rights movements and political parties began to arise in Bolivia, the most notable being the *Katarista* movement in the late 1960-70s.²¹⁹ In honor of the Aymara leader Tupac Katari who led an indigenous rebellion in 1781, *Katarismo* was a movement that focused on the Aymara and Quechua cultures, which they believed made up the majority of the Bolivian society and were the victims of centuries-long imperialist oppression.

The Katarista movement eventually split into various factions and lost popularity by the late 1980s, but the groundwork for indigenous mobilization had been laid.²²⁰ Several small indigenous parties developed throughout the late twentieth century, like the *Movimiento Indígena Pachakuti* (MIP) and *Movimiento Revolucionario Tupaq Katari de Liberación* (MRTKL), but none ever had great success in the political sphere. These movements and organizations did, however, force the traditional political parties to adopt more inclusive multicultural agendas, giving MAS and Morales the opportunity to formalize a proper party.

Bolivia’s history of indigenous mobilization paved the way for the development of ethnic politics, and Evo Morales’ charismatic leadership transformed it. Morales’ role as the head of the MAS party was a mobilization tactic to gain support amongst the people, especially the native communities. One of the major critiques that MAS and Morales had of the traditional Bolivian

²¹⁸ Miguel A. Buitrago, “El Significado de La Llegada de Evo Morales al Poder En La República de Bolivia,” *Iberoamericana* (2006), 159

²¹⁹ Willem Assies and Ton Salman, "Ethnicity and politics in Bolivia." *Ethnopolitics* 4, no. 3 (2005), 273

²²⁰ *Ibid.*, 274

parties since the Revolution is the concept of a “representative” multicultural government. According to Morales, a representative government is no more than a power-grabbing attempt to restrict the people; direct democracy is the only true form of democracy. While the MNR proposed and put into place a number of laws that focused on multiculturalism as a way to represent the people's wishes, Morales is the real-life representation of the people because he is one of them. Morales was portrayed as a “leader of the people” because he was a working-class indigenous person like so many of his constituents. The people, especially the indigenous or mestizo people, could physically see themselves in Morales because of his relatable upbringing that resembled their own.

This is a typical and effective populist strategy to gain support. By establishing a personal connection to the “pure people”, the leader forms a bond that draws supporters in. In Evo Morales’ case, there was very little convincing that had to be done to prove his relationship to the Bolivian people. An Aymara native from a working-class farming family who migrated to Cochabamba out of necessity during a time of economic instability and a long-standing member of the coca unions; he had the ideal résumé. The additional character embellishment, common amongst populists, was to further fortify what his biography already demonstrated. He utilized symbolic cultural elements, like wearing the traditional Aymara garb, to tie the persona together in a visually appealing manner.

The *wiphala* flag was a particularly significant symbol throughout his campaign and his presidencies. In his own words, Morales said “La wiphala, emblema del Abya Yala, nombre de nuestro continente antes de la invasión española, es hoy emblema de integración de la patria grande y de la lucha de los pueblos del mundo por dignidad y liberación.”²²¹ In this quote Morales also uses the indigenous term “Abya Yala”, a term coined by many indigenous peoples

²²¹ Morales, Evo (@evoespueblo), “La wiphala, emblema del Abya Yala, nombre de nuestro continente antes de la invasión Española...,” Twitter, September 28, 2021.

throughout the continent to refer to South America without using the colonial name “America”. This is a perfect example of how material symbols combined with language can be used by populists as an appealing unifier. Morales uses the symbols which are culturally significant to the indigenous people (coca leaves, traditional Aymara clothing, the *wiphala* and indigenous languages) to draw the people in and demonstrate his personalist connection to them.

He would often use culturally significant places as the stage for important political events. When he won the election in 2005, he celebrated with the people in Cochabamba, and for his inauguration ceremony in 2006, “he famously eschews suits and ties and held his inauguration amid the ruins of the ancient city of Tiwanaku—long a national symbol of the indigenous past—using a reconstructed indigenous ritual.”²²² Language was another very important element of his ethnopopulism as it was often portrayed as a symbol of indigenous resistance and resilience. Despite being Aymara, Morales also spoke Quechua as fluently as he spoke Aymara and Spanish, meaning he could appeal to and represent all the Bolivian people.²²³

Utilizing cultural elements in a political campaign is not inherently populist; most political candidates around the world use symbolism to unify and gain the trust of their constituents. What characterizes Evo Morales’ approach as ethnopopulist is the intended purpose of this strategy, which is to divide the society into two distinct groups. Morales essentially separates society into two homogenous groups by drawing on the discrepancies that set them apart. The “pure people” in Bolivia are the majority of the indigenous and mestizo citizens, all of whom have been taken advantage of by the “elite” and imperialist governments. Drawing on Bolivia’s colonial history and the failed territory wars following sovereignty, Morales easily demonstrates how the indigenous and mestizo people have been discriminated against for centuries and have not been

²²² Brienen, "A populism of indignities: Bolivian populism under Evo Morales", 86

²²³ Madrid, “The Rise of Ethno-Populism in Latin America: The Bolivian Case”, 15

properly compensated for their suffrage. By utilizing his own ethnic connection to them, he places himself in the “pure” group alongside them. His cultural alliance with the native communities innately distances himself from the corrupt elite group, further establishing a bond with the people.

3.4.2 An Inclusive Approach

It’s clear how Evo Morales gained the support of the indigenous communities through his ethnopopulist approach, but not all of Bolivia identifies as indigenous or mestizo; how, then, did MAS win the election so victoriously in 2005 with a more than fifty four percent majority? The answer is “inclusive populism”, a common strategy observed in most cases of Latin American populism. As was discussed in the previous section of this dissertation, inclusive populism is a tactic used predominantly in Latin America to gain support of the masses, contrary to the exclusive populism most noted in Europe.²²⁴

Populism in Latin America is often inclusive in part because of the region’s multicultural and multiethnic makeup, meaning it would be unreasonable to follow strict or xenophobic guidelines in an attempt to reach the majority of people. While Bolivia may be the Latin American country with the highest percentage of indigenous or mixed race peoples, Caucasians of European descent still make up at least fifteen percent of the population, and they are typically the most politically active demographic in the nation.²²⁵ With that in mind, MAS could not develop as a strictly indigenous party if it wanted success in Bolivian elections, so an inclusive approach had to be followed to not alienate any particular demographic.

²²⁴ Mudde, *Voices of the peoples: Populism in Europe and Latin America compared*, 23-29

²²⁵ Arnade and McFarren, "Bolivia."

Evo Morales is the perfect example of how a candidate can be an ethnopopulist and inclusive at the same time. While Morales may have used his ethnic connection to the indigenous communities to secure the native vote, he had to adopt an inclusive approach to gain more support. “By avoiding exclusionary rhetoric, developing an inclusive populist platform, and forming alliances with organizations dominated by members of other ethnic groups”²²⁶, he made it very clear that MAS was not an indigenous party, but rather a mutli-ethnic coalition. Other indigenous parties adopted exclusionary rhetoric and utilized an extreme nationalist and anti-white campaign, claiming it was time for the indigenous peoples to regain complete control of their native land.²²⁷ MAS leaders maintained the position that, while many of their supporters and candidates may be indigenous or mestizo, it was not their objective to exclude others the same way they had been ostracized by the political institutions and those in power.²²⁸ For this reason, they gradually included more white and mestizo candidates and actively worked with indigenous and non-indigenous organizations to demonstrate their inclusivity.

The Morales administration made it their mission to rule with an amalgam of ethnopopulism and inclusive populism, allowing him to appeal to the full Bolivian public. The preamble of the 2009 Constitution, passed by the Morales administration, clearly demonstrates the indigenous influence of Morales’ presidency. It reads,

El pueblo boliviano, de composición plural, desde la profundidad de la historia, inspirado en las luchas del pasado, en la sublevación indígena anticolonial, en la independencia, en las luchas populares de liberación, en las marchas indígenas, sociales y sindicales, en las guerras del agua y de octubre, en las luchas por la tierra y territorio, y con la memoria de nuestros mártires, construimos un nuevo Estado.²²⁹

This excerpt is a unifying call to Bolivians that plays on their shared struggles. It highlights the battles that Bolivia has overcome, and it strategically encompasses all Bolivian citizens together

²²⁶ Madrid, “The Rise of Ethno-Populism in Latin America: The Bolivian Case”, 3

²²⁷ Ibid., 16-17

²²⁸ Ibid., 13

²²⁹ Constitución Boliviana, Preámbulo

in a romanticized memoir. The indigenous perspective is mentioned directly, engaging the indigenous peoples openly, but the preamble equally addresses the grievances and strength of Bolivia has a unified, sovereign nation, conveniently including everyone in his discourse. By doing so, Morales demonstrates how a populist can combine ethnic politics with national symbols and an inclusive narrative to gain and maintain the support of the people.

Populism emerges most successfully during periods of political turmoil and civil unrest, and Bolivia was certainly at the breaking point. The country was amidst one of the worst economic recessions in its history.

After the economic reforms that followed the National Revolution of the 1950s, Bolivia seemed positioned for sustained growth...From 1977 to 1986, Bolivia lost almost all the gains in GDP per capita that it had achieved since 1960. In 1986, Bolivia started to grow again, interrupted only by the financial crisis of 1998–2002, which was the result of a drop in the availability of external financing.²³⁰

Morales claimed that the elites were to blame. He criticized what he called “neo-liberal reforms” put in place by the previous governments for being contradictory and soft and spoke often of the economic crisis that resulted in outrageous inflation and increased poverty. With this unifying yet critical discourse, Morales and the MAS party were “able to build an ethno-populist coalition of Indians, poor people, the politically disenchanted, subaltern organizational activists, and left-of-center (especially, statist and nationalist) voters.”²³¹

Although Morales and MAS used an inclusive strategy to unite supporters, it simultaneously split the society into two distinct groups, the pure people versus the elites, making it a populist tactic. The separation of the two groups at odds is an essential distinction that populists will make to appeal to the masses. In Morales’ populist discourse, the “us” versus “them” rhetoric was defined in very broad terms in order to attract the greatest number of

²³⁰ Timothy Kehoe, Carlos Gustavo Machicado, and José Perez-Cajías, “The Monetary and Fiscal History of Bolivia, 1960–2017,” *National Bureau of Economic Research*, (2019), 2

²³¹ Madrid, “The Rise of Ethno-Populism in Latin America: The Bolivian Case”, 4

Bolivians while simultaneously distancing itself from the corrupt elite. The “corrupt elites” were made up of imperialist foreign governments trying to exploit Bolivian resources, like the United States, and local elites working in the interest of these groups.²³² These people and organizations were the minority, according to Morales, and the “pure people” were the majority of Bolivians who were being oppressed and maltreated by the elites.

MAS’ self-identification as a party instrumented by the social movements of working-class Bolivians also blurs the lines slightly in regard to its “inclusivity”. The coca-farmers social movements during the latter part of the twentieth century were the basis for the development of MAS as a political party, meaning the party already had a pre-disposed collective identity. With that being said, it is difficult to separate the social movement identity of MAS from Evo Morales’ discourse as a president because it is the central factor in his ethnopopulist campaign. According to sociologist Charles Tilly, social movements can be both a blessing and a curse to democratization. On one hand, “democratization promotes the formation of social movements” by broadening the range of participation in public politics to include a wider variety of individuals allowing for more categorical equality.²³³

This is what MAS and Morales claim their party aims to accomplish. On the other hand, because social movements are composed of relatively closed groups or organizations unified by a single identity, social movements can also promote de-democratization due to the narrow classifications of who should participate in the movement, thereby excluding certain individuals from the public political sphere.²³⁴ Essentially, this means that while MAS and Morales may claim that the campaign of the party is intended to include all Bolivians, the social-movement

²³² Diego Andreucci, "Populism, hegemony, and the politics of natural resource extraction in Evo Morales's Bolivia," *Antipode*, (2017), 8

²³³ Tilly, *Social movements, 1768-2004*, 143

²³⁴ *Ibid.*, 143

nature of the party almost inherently excludes those who the party do not identify as part of the “pure people”.

So, while Latin American populism may be classified as “inclusive” in the sense that its objective is to unite the greatest number of people against a common antagonist, the populist will always identify a certain group and/or organization as the target responsible for the people’s grievances, effectively separating the society in two. The key to Morales’ successful populist strategy was that he, and MAS, portrayed the enemy as the minority that has unfairly benefited off the struggles of the majority. MAS was successfully able to unite a majority of the Bolivian population under the umbrella concept of a “true people ” with Evo Morales serving as their only representative, but in order to do so, an enemy of the people had to be identified. The adversary in Morales’ populism campaign were “abusive imperialist forces”, and he was very successful in utilizing the strategy to gain support.

3.4.3 Anti-Imperialism and Resource Nationalism

*“Este proceso de cambio es sin retorno; digan lo que digan, hagan lo que hagan.
No volverá el neoliberalismo a Bolivia.”*
(Evo Morales, n.d)²³⁵

Morales boldly ran a strong, “anti-imperialist” campaign and never shied away from criticizing foreign powers, especially the United States. At the risk of being perceived as an indigenous person embittered by colonialism, Morales skillfully manipulated the discourse to make it simultaneously inclusionary and leftist. According to his rationale, Morales claimed that post-imperialism was more than European control of Latin America and the maltreatment of

²³⁵ “El Mejor Discurso de Evo Morales – Mercosur,” 2019, Youtube, July 17, 2019.
<https://www.youtube.com/watch?v=Uu0xGkWUdQ>.

indigenous peoples; it was an ongoing exploitation project that impacted all Bolivians, regardless of their ethnic or cultural background.

Following this discourse, imperialism did not end with Bolivian independence in the nineteenth century because the discrimination which resulted of it continued. When analyzing this concept from a socio-historical point of view, this rationale can be supported. As Patrick Dove explains, even in the post-independence period,

Peru and Bolivia were dominated by the ‘gamonalist’ system, which... maintained indigenous populations as indentured servants or slaves... Social organization therefore remained profoundly hierarchical with exclusion, subjugation and naked exploitation justified through images and narratives of the Indian’s racial inferiority.²³⁶

Morales utilized Bolivia’s colonial history to his benefit by emphasizing its significance in his discourse. He manipulated the emotional relationship between the indigenous communities and the suffering of them and their ancestors at the hands of the colonial system and used this as a mobilization tool.

For example, in his 2006 presidential inauguration speech in La Paz, Morales said,

¿Y por qué hablamos de cambiar ese estado colonial?, tenemos que acabar con el estado colonial. Imagínense: después de 180 años de la vida democrática republicana, recién podemos llegar acá, podemos estar en el Parlamento, podemos estar en la presidencia, en las alcaldías. Antes no teníamos derecho.... Ahí estaba el estado colonial, y aún todavía sigue vigente ese estado colonial. Para cambiar ese estado colonial habrá espacios, debates, diálogos. Estamos en la obligación, como bolivianos, de entendernos para cambiar esta forma de discriminar a los pueblos.²³⁷

In his speech, Morales makes it clear that while colonialism may have ended in Bolivia, the system of the “colonial state” remained. Centuries later, the “pure Bolivian people” were continuously being exploited by foreign powers while the elitist governments profit off their misfortunes. With this revolutionary discourse, however, he claims his presidency would

²³⁶ Patrick Dove, "The Desencuentros of History: Class and Ethnicity in Bolivia," *Culture, Theory and Critique*, 56:3, (2015), 325

²³⁷ Morales, *Discurso de Posesión del Presidente Constitucional de La República, Evo Morales Aima*, 5

represent a new, modern era in Bolivia, and the people would have to unite behind him to dismantle and change the system.

This was Morales' most clever strategy to mobilize the people and unify the masses. Bolivia was a perfect storm for populism and Morales was successfully able to tap into this vulnerability. By understanding the grievances of the people, Morales was able to channel their frustrations and form a successful campaign identifying a common enemy and providing an easy answer to the nation's problems. Foreign powers had been the common enemy and root cause of Bolivian suffrage throughout the country's history. Centuries of colonialism at the hands of the Spanish; massive territorial loss after failed wars with Chile and Paraguay; foreign imperialists who have stolen and exploited Bolivian natural resources; unfair trade deals with countries that benefited at Bolivia's expense²³⁸; the United States interference in Bolivian politics and its "war on Drugs" which directly impacted the Bolivian coca farmers.

One of Morales' most controversial stances, his support of coca cultivation and his criticism of the United States' "War on Drugs" was a commentary on foreign, elitist profiteering. The U.S.' coca ban, according to Morales, was an imperialist project intended to harm Bolivia's reputation and economy under the guise of "salvation", and it meant negative repercussions for all Bolivians, not just coca farmers. The U.S.' "War on Drugs" also did little to actually combat narco trafficking or drug consumption, according to Morales. He tweeted, "Bolivia es modelo y ejemplo de lucha contra el narcotráfico a diferencia de EEUU que siendo el principal consumidor mundial de drogas, usa sus 'certificaciones' y 'memorandos' como excusa para intervenir países militar y políticamente".²³⁹ In Morales' discourse, the United States was an imperialist

²³⁸ Marten Brienens, "A populism of indignities: Bolivian populism under Evo Morales," *Brown Journal of World Affairs*. Vol. 23, no. 1, (2016), 84

²³⁹ Morales, "#Bolivia es modelo y ejemplo de lucha contra el narcotráfico a diferencia de #EEUU que siendo el principal consumidor mundial de drogas...", Twitter, September 17, 2021.

opportunist who has taken advantage of and severely damaged Bolivia to its own benefit, making it the enemy.

The culmination of all these factors resulted in a national sense and narrative of humiliation and resentment, which Morales used to his advantage during his presidential campaign. Morales manipulated the emotional connection between the Bolivian people and resource nationalism to unify “the people” together against the imperialist enemy. Bolivian resource nationalism is the belief that “Bolivian poverty persists amid abundant natural wealth, meaning that it can be explained only as a result of the theft and looting of that wealth by outsiders, including foreign capitalists and domestic elites.”²⁴⁰ Bolivia is a land rich in silver, gold, gas, and a plethora of cash crops, yet it still remains one of the poorest countries in Latin America, meaning, according to his simplistic narrative, someone is benefiting at the expense of the Bolivian people. Morales utilized this national dissatisfaction in his campaign and throughout his presidency to constantly emphasize that the corrupt elite, made up of “colonialists, imperialists, and capitalists”, were the opposition, and that he could be the answer to this situation.²⁴¹

In classic populist fashion, Morales provided simplistic and direct answers to the multifaceted grievances of the people. After establishing that the imperialist foreign powers and elites were to blame for Bolivia’s struggles, resolutions to these problems had to be determined. He promised land reforms that would benefit the peasants and indigenous communities, and fought against globalization and U.S. imperialism, emphasizing his rejection of the “war on drugs”.²⁴² Morales sought to nationalize the country’s natural resources, especially hydrocarbons, and undo the privatizations from the previous “neoliberal” government. He included hydrocarbon

²⁴⁰ Brienens, “A populism of indignities: Bolivian populism under Evo Morales.”, 85

²⁴¹ *Ibid.*, 85

²⁴² *Ibid.*, 85

nationalization in article 359 of the 2009 Constitution, stating that hydrocarbons belong to the Bolivian people and its production, along with the income made from its production, are to be handled by the State.²⁴³

Morales' decision to nationalize Bolivian natural gas after taking office was a major step in demonstrating his commitment to the Bolivian people and their grievances. The Bolivian Gas War was a conflict over the country's natural gas reserves, sparking protests and leading to the resignation of former President Gonzalo Sánchez de Lozada in 2003. The MAS party played a crucial part in these protests and coined the slogan "Gas for the People"²⁴⁴, again a tactic used to unify the people in the so-called "anti-neoliberal" struggle.

The slogan, 'Gas For the People' came to condense all material demands around the perceived disposition of the Bolivian poor.... for most of Bolivia's public sector, it signified primarily greater national sovereignty and wealth distribution; for the indigenous organizations in gas extraction areas, nationalization was seen as an intermediate step towards the promotion of local territorial autonomy with co-government of natural resources.²⁴⁵

Morales and his party understood the significance of resource nationalism and knew how to manipulate it to gain and maintain the support of the people.

Nationalization of natural resources and the redistribution of wealth and land were acts of rebellion against "imperialist forces" and sought to reassert national sovereignty, which appealed to the people looking for answers to their struggles. His propositions were exactly what the Bolivian masses wanted to hear and given his already established public reputation for being an anti-imperialist, leftist and indigenous revolutionary leader, they were confident he would hold true to his promises. In a public rally, Morales praised the success of his government for being the sole reason for Bolivia's economic improvement. He said,

²⁴³ Constitución Boliviana, Art. 359.1

²⁴⁴ Andreucci, "Populism, hegemony, and the politics of natural resource extraction in Evo Morales's Bolivia.", 7

²⁴⁵ Ibid., 7

Tantas veces marchamos para cambiar el modelo neoliberal, el modelo económico... Después de llegar al gobierno, cumplimos con el mandato del pueblo que era la nacionalización. A partir de ese momento, empezó a cambiar la situación económica del país.²⁴⁶

This is a perfect example of why a populist must create a well-developed persona in order to be successful; the epitome of an effective prosperous populist is a leader that the masses can trust and can then use that public confidence to mobilize the people and secure their support. He claimed not only that the economic success of Bolivia is a direct result of his administration's nationalization efforts, but that these efforts were at the expressed directive of the people. Morales defends his actions by saying he works in the best interest of the people, and then uses this popular support to lead Bolivia in an increasingly populist manner.

3.4.4 Institutional Populism

“Gracias a la lucha del pueblo Boliviano, gracias a la lucha de ustedes y la consciencia de ustedes, ahora, sin embajador de Estados Unidos, sin la base militar norteamericana, estamos mejor políticamente, democráticamente, y especialmente, estamos mejor económicamente.”
(Evo Morales, 2014)²⁴⁷

The three previous sections analyze how Evo Morales and MAS used populist strategies to gain support and win the presidential election, but it is through the course of Morales' presidency that the populist evolution materialized. The ethnopopulist and inclusionary populist methods used by the MAS party and Morales paint a picture of a successful political candidate who was able to mobilize the people by his cultural connection and all-embracing rhetoric, and his leftist anti-imperialist campaign unified the masses against a common enemy. But once in

²⁴⁶ Velasco, *Un Día Con Evo Morales: Un Documental*, 27:13.

²⁴⁷ “Evo Morales Cerró En El Alto Con La Promesa de Ganar El Domingo En Los 9 Departamentos de Bolivia.” (Youtube, 2014). <https://www.youtube.com/watch?v=5JHJR7iLNnQ>.

power, Morales' discourse became increasingly anti-systemic, and gradually his overwhelming support began to dwindle, even amongst the indigenous communities.

As is the case in most examples of populism, Bolivia's socio-economic situation created the perfect storm for the introduction and success of a populist leader. When a country is already experiencing political unrest and institutional skepticism, the outsider strategy of populist leaders is an effective method to gain support. Desperate people look to strong leaders to answer their grievances as swiftly as possible. In already struggling countries, like Bolivia, there is a "deep sense of frustration among many voters who want more dramatic solutions and a bold, decisive leader willing to decree them."²⁴⁸

At the end of the twentieth century, Bolivia was undergoing an economic and political crisis simultaneously, leaving Bolivians untrusting of their democratic system and wary of the fragmented traditional party system.²⁴⁹ Bolivia underwent one of the most significant economic crises of the twentieth century in the 1980s, making it the poorest country in South America by the late eighties, and the second poorest in the Western Hemisphere, surpassed only by Haiti.²⁵⁰ After decades of economic decline and popular dissatisfaction for the Bolivian government, an alternate party campaigning with an anti-system leader rose as an attractive alternative.

Since its inception, MAS has vehemently insisted that it is not a traditional political party, rather it is an instrument of the social movements, and the party's distinction from the status quo is critical. Evo Morales and MAS took advantage of the public discontent by emerging as political outsiders with no traditional party bureaucracies.²⁵¹ By presenting himself as a social movement leader rather than a politician and combining this persona with a nationalist pro-coca

²⁴⁸ Zakaria, "Populism on the March: Why the West Is in Trouble."

²⁴⁹ Buitrago, "El Significado de La Llegada de Evo Morales al Poder En La República de Bolivia.", 162

²⁵⁰ Morales and Sachs, "Bolivia's Economic Crisis", 59

²⁵¹ Madrid, "The Rise of Ethno-Populism in Latin America: The Bolivian Case", 20

campaign, Morales appealed to the people displeased with Bolivia's political situation and looking for radical change. After winning the election with his outsider persona, Morales had to continue the anti-establishment crusade throughout his presidency. Immediately after taking office, Morales made it clear one of his major objectives would be to reverse the neo-liberal policies of the previous governments and nationalize the country's economy.²⁵² The nationalization of industries was a bold and risky decision, yet while many of the companies fought the policy changes initially, the state's revenues increased significantly as a result, allowing for more social spending. The International Monetary Fund (IMF) reported that between 2004 and 2017, the country's GDP grew an average of 4.8%.²⁵³

“El uso de las reservas que había acumulado en el momento de auge fue fundamental para que Bolivia siguiera creciendo incluso después del deterioro en los precios internacionales. Fue el cuarto país que más creció en el último trienio: un 13%, detrás de República Dominicana (19%), Panamá (14%) y Paraguay (13%). Y en 2018 tuvo un alza del 4%, que solamente quedó por debajo del 7% de República Dominicana.”²⁵⁴

As Morales redistributed Bolivia's newfound wealth to serve the social sectors, his popularity increased, especially among the lower social classes and indigenous communities who felt the majority of these benefits. The redistribution of assets as a result of nationalizing Bolivian industries was Morales' most ingenious strategy throughout his presidency. By doing so, he was successfully able to secure acclaim and prove his dedication and authenticity to his constituents. The nationalization of Bolivian industry, like gas and electricity, confirmed to his supporters that Morales' priority was the nation's prosperity, not that of foreign governments or companies.

After being sworn into office in 2006, the leader nationalized Bolivia's oil and gas industries with the goal of renegotiating contracts with foreign energy companies and transferring the power and revenue from natural resources into the hands of the Bolivian government. He controversially redistributed 134 million acres of

²⁵² Ignacio Arana Araya, "What Drives Evo's Attempts to Remain in Power? A Psychological Explanation." *Bolivian Studies Journal*. Vol. 22 (2016), 203

²⁵³ IMF, "Press Release 18/453." *IMF Executive Board Concludes 2018 Article IV Consultation with Bolivia*. (International Monetary Fund (IMF), 2018.)

²⁵⁴ Darío Mizrahi, "Luces y Sombras De La Economía Boliviana En Tiempos De Evo Morales," *infobae*, (2019.)

land from state or private ownership to Indigenous families, some of whose relatives had been forced to work as sharecroppers or slaves.²⁵⁵

By redistributing assets and natural resources, he claimed to give precedence to Bolivian “national interest”, demonstrating that he was different from the elitist governments of the past just as he had claimed during his campaign.

This populist strategy, while it may have benefitted indigenous families and farmers, is inherently undemocratic. The term “redistribution” literally means “the distribution of something in a different way, typically to achieve greater social equality”²⁵⁶, which is a definition vague enough to allow for a great deal of leeway. Morales’ agrarian reform is just as harmful as it is helpful, although the point of view differs depending on the individual’s socio-economic status. As NPR journalist Annie Murphy reported in her 2010 broadcast, “Morales is giving land to the nation's poor, indigenous majority. And that includes state land, unused land, and land taken from private individuals. Those private interests call this a populist land grab.”²⁵⁷ Morales’ land redistribution efforts are, for all intents and purposes, a populist land grab. While it is undeniably true that discriminatory policies in Bolivian history did not allow for indigenous individuals to own land, resulting in most indigenous people and low-income farmers in Bolivia still suffering from social and economic inequalities, the “re-claiming” of privately owned land is by no means a democratic resolution.

The taking of private land from Bolivians, many of whom have owned the properties in their families for generations, is an example of how Morales abused his power to push his personal agenda. The Morales administration argues that the redistribution efforts are legitimate

²⁵⁵ Isabella Gomez Sarmiento, “How Evo Morales Made Bolivia a Better Place ... before He Fled the Country,” NPR, November 26, 2019, <https://www.npr.org/sections/goatsandsoda/2019/11/26/781199250/how-evo-morales-made-bolivia-a-better-place-before-he-was-forced-to-flee>.

²⁵⁶ Cambridge Business English Dictionary, “Redistribution,” *Cambridge University Press*, (2021). <https://dictionary.cambridge.org/us/dictionary/english/redistribution>.

²⁵⁷ Annie Murphy, “Effects of Land Reform in Bolivia,” NPR, January 3, 2010, <https://www.npr.org/templates/story/story.php?storyId=122198550>.

because the properties have been illegally held since the colonial era, and therefore should be used to benefit the indigenous peoples that have been disproportionately disadvantaged.²⁵⁸ For Morales' indigenous or lower-income voters, this reform seemed reasonable enough as it directly benefited them. In reality, however, this argument was a populist strategy used to mask the undemocratic institutional breakdown.

Regardless, this tactic secured Morales enough support to win a second term²⁵⁹ and gave him enough leeway to govern freely. So, while the action of nationalizing industry and redistributing wealth may not inherently be populist (it is mostly Marxist), it can be identified as an undemocratic populist strategy in Morales' presidency. As is the case with any political figure, in order to maintain the loyalty and satisfaction of the masses, the leader must hold true and deliver on their campaign promises. With the security of popular support, Morales went on to more direct populist maneuvers to insure political power.

3.4.5 The 2009 Constitution

The best testament to Morales' populist tendencies was his rewriting of the Bolivian Constitution. Morales had claimed throughout his campaign that the reworking of the constitution would be a priority of his if elected, and in 2006 he stood by his promise. His revision proposals were not met with much approval from congress or the opposition parties, so a referendum was held in October of 2008.²⁶⁰ The new Bolivian Constitution was put into effect in 2009 as a result

²⁵⁸ Ibid.

²⁵⁹ Morales won the 2009 general election with 64.2% of the vote. Manfred Reyes Villa from the Plan Progreso para Bolivia- Convergencia Nacional (PPB- CN) party came in a distant second with 26.46%. The 2009 presidential election was the general election with the greatest percentage of participation in Bolivian history, over 95%. (Source: OEP. "Boletín Estadístico Número." ELECCIONES GENERALES 2009 . Órgano Electoral Plurinacional (OEP, 2013), https://www.oep.org.bo/wp-content/uploads/2016/12/boletin_estadistico_2.pdf.)

²⁶⁰ Araya, "What Drives Evo's Attempts to Remain in Power? A Psychological Explanation", 206

of the referendum, for which voter turnout reached 90% with an overwhelming majority of voters supporting the Constitution revision.

As was analyzed in the previous section of this dissertation, the use of referendums and the implementation of new constitutions is a common populist strategy that leaders use to alter the laws in their favor. Referendums are convenient tools used by populists to alter laws quickly under the guise of “popular vote”.²⁶¹ Morales could have simply worked within the political institutions to make alterations to the Bolivian Constitution, but his decision to utilize a referendum was both to undermine the system and prove his commitment to being a “president of the people”. By asking the Bolivian people to actively participate in his government’s decisions, Morales secures their support and validates his actions. This is also a tactic to further reinforce the concept of two opposing homogenous groups, the elites versus the people. Seeing that the result of the referendum is the will of the people, anyone or any party that does not support the outcome is elitist and against the people.

Morales’ 2009 Constitution introduced some changes that directly benefited the Bolivian indigenous peoples. The new Constitution granted indigenous peoples more autonomy, the ability to self-govern and the right to express their culture.²⁶² Article 5 of the Constitution recognized thirty-six indigenous languages as official languages of the state, far more than had been acknowledged by previous governments.²⁶³ Article 11 embraced a form of government that would be communitarian, representative and a direct democracy, inspired by governing methods used by the indigenous communities.²⁶⁴ For the indigenous communities, these changes were everything

²⁶¹ Mudde, *Populism: A very short introduction*, 84

²⁶² Carlos De la Torre, "In the name of the people: democratization, popular organizations, and populism in Venezuela, Bolivia, and Ecuador," *European Review of Latin American and Caribbean Studies/Revista Europea de Estudios Latinoamericanos y del Caribe*. No. 95, (2013), 34

²⁶³ Constitución Boliviana, Art. 5.1

²⁶⁴ *Ibid.*, Art. 11.1

they could have hoped for with an indigenous president representing them. As a result of this popular satisfaction, Morales won a second term in the 2009 general election, and more importantly, MAS won a two-third majority in both chambers of Congress, signifying MAS dominance in nearly every political institution.²⁶⁵

However, the 2009 Constitution also brought some personal benefits for Morales: longer term limits. The modification of presidential term limits is undeniably a populist maneuver because it “distorts the democratic process”²⁶⁶. It is an attempt for a party or individual to preserve and deepen the power they have in the government, and it completely undercuts the institutional system. Technically, the 2009 Constitution did not explicitly extend the president’s term limits, rather Article 168 provisions for two consecutive terms for the president.²⁶⁷ However, seeing that Morales’ first term was under a different constitution, this allowed him to run for a third term in 2014 on a technicality, which he won. With this alteration, Morales was able to govern until 2020, longer than any single leader since Bolivia’s independence.²⁶⁸

Term limits are essential to maintaining a liberal democracy because they ensure no single individual can hoard power and subvert the system. Simón Bolívar, known by many as “The Liberator” for his nineteenth century liberation crusade in South America, and Bolivia’s namesake, once said that “nothing is more perilous than to permit one citizen to retain power for an extended period. The people become accustomed to obeying him and forms the habit of commanding them; herin lie the origins of usurpation and tyranny.”²⁶⁹ Morales’ use of the constitution to secure a longer reign confirmed his mobilization tactics over the previous decade

²⁶⁵ Araya, "What Drives Evo’s Attempts to Remain in Power? A Psychological Explanation", 207

²⁶⁶ Müller, *What is Populism?*, 101

²⁶⁷ Constitución Boliviana, Art. 168

²⁶⁸ Araya, "What Drives Evo’s Attempts to Remain in Power? A Psychological Explanation", 208

²⁶⁹ Quoted in Alexander Baturo, “The Stakes of Losing Office, Term Limits and Democracy,” *British Journal of Political Science*, (2010), 637

had all been indications of his developing populism. This was also the first indicator of Morales' populism developing into something potentially harmful to Bolivia's liberal democracy.

Populism is often at odds with liberal democracy and the impact of a populist government can result in the de-democratization process of a country.²⁷⁰ The manipulation of referendums and constitutions is a populist tactic to undermine the institutions of the liberal democracy and shift the system in their favor. As Müller writes, “the new constitutions helped decisively in the populist project of ‘occupying the state,’ as the shift to a new constitution justified the replacement of existing office holders.”²⁷¹ Essentially, Morales' Constitution enabled him to secure more power under the guise of popular support. This act is one of the first warning signs of democratic erosion, where populists will revise democratic institutions that protect the fundamental rights of the people and security of the system.²⁷² The 2009 Constitution was the first concrete example of Morales' populism in action and alluded to the further populist evolution that would occur.

While Morales' 2009 Constitution is certainly a testament to his growing populist tendencies, it's also crucial to note that constitutional amendments or reforms are not uncommon in Bolivia. The reworking of the constitution and the introduction of new laws was a normal occurrence for the Bolivian people, so Morales' decision to introduce a new “law of the land” did not constitute an immediate call for concern by any means. Bolivia's first constitution was instituted in 1825 following the country's independence, but the subsequent year a new, more detailed Constitution was enacted. A number of new constitutions or constitutional amendments

²⁷⁰ Mudde, *Populism: A very short introduction*, 81

²⁷¹ Müller, *What is Populism?*, 116

²⁷² Mudde, *Populism: A very short introduction*, 91

were made from then on, each one re-writing the laws of the previous one and altering the political system.²⁷³

Constitutional revisions and the introduction and relegation of legislation became a normalized practice in Bolivia, and it was under these conditions that the Bolivian system was formed. Muñoz-Pogossian writes, “indeed, electoral reforms have been a key part of Bolivia’s institutional development. Between 1958 and 2007, the country had about thirteen electoral reforms- an average of a new electoral law every 3.4 years.”²⁷⁴ With this in mind, it’s no wonder Morales’ constitution passed without much contest.

Constitutional revisions and electoral reforms playing a routine part in the Bolivian political process is not necessarily negative. Laws should evolve as societies do to best serve the people; this is a typical occurrence in most modern democracies. There is, however, a fine line between regular legislation reexamination and power manipulation via institutional means, and in Bolivia those lines are blurred. Power manipulation efforts and radical policy changes have been facilitated by the irregularity and inconsistency in the Bolivian political and electoral system. While the Bolivian system has managed to maintain relative political stability throughout its history, “the reforms have also produced a complex and politically volatile environment”²⁷⁵. When we take Bolivia’s history of institutional instability into account, we can clearly see how Morales was successfully able to come to power and undermine the system. The unsteady electoral system and fragile institutions are not an excuse for Morales’ populist takeover, but they do serve as a facilitator to it and as a useful explanation for us to better analyze the case.

²⁷³ International IDEA, “Constitutional History of Bolivia,” *The International Institute for Democracy and Electoral Assistance*, December 9, 2019, <https://constitutionnet.org/country/constitutional-history-bolivia>.

²⁷⁴ Betilde Muñoz-Pogossian, *Electoral rules and the transformation of Bolivian politics: The rise of Evo Morales*, (New York: Palgrave Macmillan, 2008), 2

²⁷⁵ *Ibid.*, 2

In an interview, Cas Mudde noted that “populists in power tend to undermine countervailing powers, which are courts, which are media, which are other parties...and they tend to do that through a variety of mostly legal means, but not classic repression.”²⁷⁶ Essentially, the populist utilizes legal maneuvers to manipulate the system in their favor, as Morales did during his terms in office. The changing of the constitution in 2009 was just one example of Morales’ growing populism, which would continue to evolve with his presidency.

3.5 Morales’ Downfall

“Bolivia is a reminder that the process of stopping semi-democratic leaders is likely to be semi-democratic as well.”
(Javier Corrales, 2019)²⁷⁷

The image of Evo Morales, the “president of the people”, began to take a turn for the worst approaching his final presidential campaign. While he had maintained the support of much of the Bolivian people for over ten years, Morales’ populist tendencies continued to evolve. However, before further delving into Evo Morales’ populist downfall, it is important to first note that Bolivia did see some material improvement during his presidency, especially economically. Morales had run on a campaign promise of breaking down the barriers of Bolivian political institutions and redistributing the benefits to all levels of society, and he made good on that promise. He, and the MAS party, never strayed away from their grassroots origins and always

²⁷⁶ Friedman, “What Is a Populist?”

²⁷⁷ Javier Corrales, “From Bolivia, Sad Lessons on How to Fix Semi-Democracies,” *The New York Times*, November 15, 2019, <https://www.nytimes.com/2019/11/15/opinion/bolivia-morales.html>.

remained faithful to the cause of indigenous and low-income communities, and as a result, MAS performed stronger than any other political party consistently from 2006 to present day.²⁷⁸

Morales stood by his commitment to empower the lower sectors of Bolivian society, giving the people more economic and political opportunities. Holding true to his indigenous roots, he implemented traditional indigenous principles of governing by giving all people the space to play an active role and participate in their government. Bolivia also saw economic growth and a significant decrease in social inequality under Morales.²⁷⁹ The International Monetary Fund (IMF) reported that between 2004 and 2017, the country's GDP grew an average of 4.8 percent, while the percentage of citizens living in extreme poverty during that time was more than halved to seventeen percent.²⁸⁰ Leftist social welfare policies combined with Morales' nationalization efforts led to a remarkable decrease in poverty, at least for a time.

The economic boom, however, would not last forever. Morales' economic policies resulted in immediate material success for some Bolivians, but this prosperity would not be long-lived according to economists. As economist Lykke Anderson explained in a 2019 interview with international press,

'Las condiciones para hacer negocios en Bolivia son pésimas por la excesiva burocracia, la falta de seguridad jurídica, los impuestos exorbitantes, las leyes laborales inflexibles y una mano de obra poco calificada. Esto desincentiva la inversión productiva e impide el desarrollo sostenible. Por otro lado, nuestras reservas de hidrocarburos se están agotando, así que el gobierno no tendrá una fuente fácil de ingresos y divisas para financiar gastos e inversión pública. En pocos años ya no vamos a tener energía barata para el país, lo cual implica un freno importante a la economía.'²⁸¹

²⁷⁸ Anria and Huber, "The Key to Evo Morales' Political Longevity: Why He's Outlasted Other Latin American Left-Wing Leaders."

²⁷⁹ Ibid.

²⁸⁰ IMF, *IMF Executive Board Concludes 2018 Article IV Consultation with Bolivia*.

²⁸¹ Mizrahi, "Luces y Sombras De La Economía Boliviana En Tiempos De Evo Morales."

According to Anderson, the benefits of Morales' nationalization plans would be short lived, and the consequences were underway. With the hydrocarbon reserves being exhausted very quickly, the government will soon lose its source of income for spending, resulting in an economic break.

The nationalization of Bolivia's natural resources had a positive effect on the economy at first, but the longevity of these improvements struggled with the weight of international economic pressures, like the drop in natural gas prices.²⁸²

Bolivia faces fresh challenges from the drop in the price of natural gas, the country's largest export. After years of budget surpluses, the country is running deficits, and concern is rising that the fixed exchange rate and big-state bureaucracy are stifling any real chance of transitioning to a modern, export-oriented economy.²⁸³

Bolivia was struggling economically, and the people began looking at their President of more than two decades a little more critically. With the economy beginning to decline, Morales' popularity amongst Bolivians followed suit.

3.5.1 The Referendum Failure

The successes of Morales' first twelve years did not overshadow his growing populist tendencies, and in 2019 Morales' popular support descended into a rapid decline. As was discussed in the previous section, the constitutional revisions made during his first presidential term allowed for leniency regarding term limits. Morales was able to run for a third time consecutively on a technicality, but his appetite was not satisfied there. Morales' third term

²⁸² Natural gas prices dropped significantly in 2019, the lowest they had been in the previous three years, and the mid-year average was the lowest it had been in nearly twenty years. (Source: U.S. Energy Information Administration. "Natural Gas Prices in 2019 Were the Lowest in the Past Three Years," Today in Energy- EIA. (U.S. Energy Information Administration - EIA, 2020))

²⁸³ Anthony Faiola, "Socialism Doesn't Work? an Emerging Middle Class of Bolivians Would Beg to Differ," *The Washington Post*, October 17, 2019, https://www.washingtonpost.com/world/the_americas/socialism-doesnt-work-an-emerging-middle-class-of-bolivians-would-beg-to-differ/2019/10/08/3b1cb3ac-e6f6-11e9-b0a6-3d03721b85ef_story.html.

would allow him to remain president until 2020, but in 2015 he proposed another referendum looking to amend the constitution and allow for a fourth term.²⁸⁴ The referendum passed, but voters rejected the appeal fifty one percent to forty-nine, a significant loss for Morales.²⁸⁵ As figure 1 demonstrates, the results of the 2016 Constitutional Referendum came very close, but the Bolivian public narrowly voted “no” to authorize Morales’ attempted fourth term.

This was the straw that broke the camel’s back, so to speak. After three consecutive terms as president, longer than any other individual in Bolivian history since the country’s independence, Morales’ proposal for a fourth term was swiftly shut down by his own people. In an ironic turn of events, the populist tactic of utilizing referendums to legitimize his popular support worked against Morales in this final attempted power grab, and it was the definite beginning of the end for him.

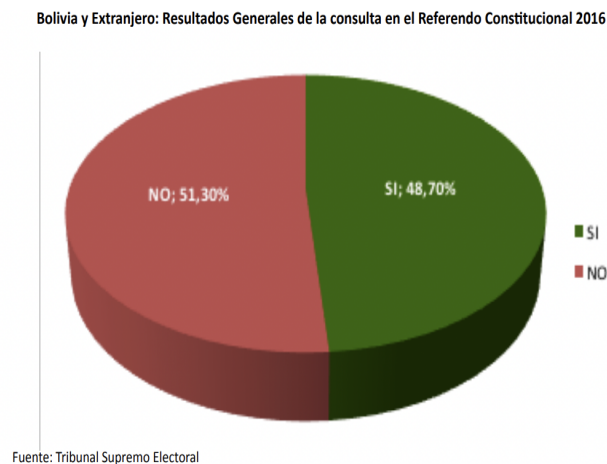


Figure 1: Results of the 2016 Constitutional Referendum

(Source: Órgano Electoral Plurinacional (OEP), 2017)²⁸⁶

²⁸⁴ Araya, "What Drives Evo’s Attempts to Remain in Power? A Psychological Explanation", 208

²⁸⁵ Dan Collyns and Jonathan Watts, “Bolivian Referendum Goes against Evo Morales as Voters Reject Fourth Term.” *The Guardian*, February 24, 2016, <https://www.theguardian.com/world/2016/feb/22/bolivia-evo-morales-president-national-referendum-fourth-term>.

²⁸⁶ OEP, “Estadísticas Electorales: Referendo Constitucional 2016,” *Órgano Electoral Plurinacional | Democracias En Ejercicio*, (2017), 7.

While Morales claimed he would accept the disappointing result, he and his supporters claimed that the loss was a fraud concocted by the corrupt elite. The data, however, does not support this claim. Figure 2 is a chart that illustrates the public's participation in the 2016 Constitutional Referendum, where each department had a participation rate of at least seventy eight percent. The high participation illustrated here clearly demonstrates that the results of the referendum reflect the opinion of the majority of the Bolivian public. Morales insisted that urban elites were actively working against him, and the international media reported that “a tense standoff at Bolivia's electoral body as opposition supporters shouted ‘fraud’ at vote counters who continued working while the overseeing panel went to lunch.”²⁸⁷

Using the “corrupt elite” as a scapegoat is a classic populist response to a defeat. Anyone who opposes the populist, and his campaign is portrayed as a member or a sympathizer of the elite because, by not agreeing with the populist's politick, they are actively working against the pure people. Any time the populist experiences defeat or a major setback during their reign, a conspiracy is concocted blaming the elite of manipulating the system to push the populist out and regain control. As Müller writes, “all failures of populists in government can still be blamed on elites acting behind the scenes, whether at home or abroad (here we see again the not-so-accidental connection between populism and conspiracy theories).”²⁸⁸

This tactic is a clever way for the populist to portray himself as a “martyr” for the people, further mobilizing and revolutionizing supporters. By claiming fraud, contriving conspiracy theories, and demonizing the “corrupt” system, the populist desperately attempts to cling to power via a loyal fanbase. Clinging to power is not only illiberal, but also completely undemocratic, and

²⁸⁷ Ibid.

²⁸⁸ Müller, *What is Populism?*, 75

it is a clear-cut sign of democratic backsliding in action. This is what Evo Morales' political downfall exemplifies: the threat of populism resulting in democratic breakdown.

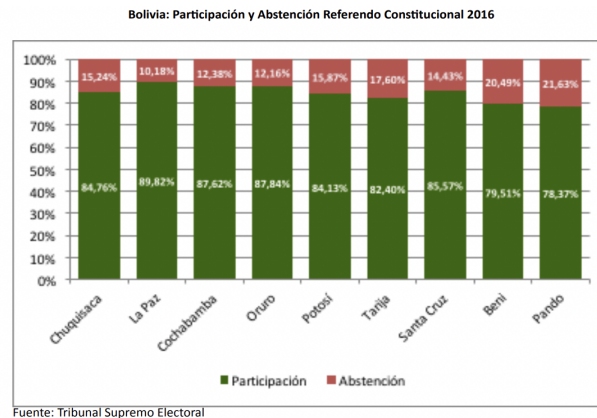


Figure 2: Public participation in the 2016 Constitutional Referendum

(Source: Órgano Electoral Plurinacional (OEP), 2017)²⁸⁹

Evo Morales attempted this method of maintaining power in the final years of his presidency. While he did not directly denounce his failure in the referendum as an elitist ploy, he insisted that the defeat was a result of the opposition's slander of him in the popular media. This claim may be true, in part. The final months before losing the referendum, a very public corruption scandal tarnished Morales' reputation and certainly aroused suspicion. Morales was accused of influence-peddling after it was revealed he had used his position to give a former girlfriend, Gabriela Zapata, an important post in a Chinese engineering firm which secured multimillion-dollar contracts with the Bolivian government.²⁹⁰ The scandal was investigated, and although Zapata was sentenced to ten years in prison, evidence was never found linking Morales to the corruption.²⁹¹ The damage had been done to Morales' reputation, however, and he claimed

²⁸⁹ OEP, "Estadísticas Electorales: Referendo Constitucional 2016", 10.

²⁹⁰ AFP, "Bolivian President Fends off Corruption Claims: 'We Have Nothing to Hide,'" *The Guardian*, February 11, 2016, <https://www.theguardian.com/world/2016/feb/11/bolivia-president-evo-morales-corruption-investigation>.

²⁹¹ Gloria Carrasco, "Condenan a 10 Años De Cárcel a Gabriela Zapata, Expareja De Evo Morales," CNN, May 23, 2017, <https://cnnespanol.cnn.com/2017/05/23/condenan-a-10-anos-de-carcel-a-gabriela-zapata-expareja-de-evo-morales/>.

that this calumny was a ruse dredged up by the elite in an attempt to discredit him in the public eye, just another convenient reason to blame the opposition for his downturn.

Public defamation on his character or not, Morales' personal scandal did not negate the facts: Morales was attempting to maintain control of the government despite losing the referendum. Claims of fraud by the corrupt elite to overthrow Morales mobilized his supporters and sparked protests, but Morales decided to turn to institutional channels to challenge the referendum rather than just taking to the streets. In 2017, the Constitutional Tribunal and Supreme Court ruled that Evo Morales had the legal right to run for a fourth term, directly contradicting the 2016 referendum results in which the people voted against the term leniency.²⁹²

According to the courts, not only did Morales have the right to run for another term, but they determined term limits would be a "violation of his human rights".²⁹³ According to Morales and the courts (which are made up mostly of MAS allies), Bolivians have the right to vote for Morales and Morales has the right to run. The Supreme Court ruling effectively overturned the referendum, allowing Morales to run for president in 2019. While this verdict may appear legal but not acceptable according to international standards, it demonstrates a corrupt system that Morales and the MAS party were able to establish via populist maneuvers.

The Supreme Court is the law of the land in any liberal democracy, but in the case of Bolivia, the judiciary institution was undermined through less-than-liberal means. World Justice Project's Rule of Law Index breaks down the analysis of a country's rule of law into various categories in order to better evaluate it. In the category that analyzes whether government officials in the judicial branch use public office for private gain, WJP gave Bolivia a distressingly low score, classifying it as one of the most corrupt countries in the world, followed only by

²⁹² Freedom House, "Bolivia: Freedom in the World 2020 Country Report," *Freedom House*, 2020.

²⁹³ Caroline Stauffer, "Native Peoples Sour on Morales, Bolivia's First Indigenous President," *Reuters*, August 24, 2018, <https://www.reuters.com/investigates/special-report/bolivia-indigenous/>.

Uganda, Cambodia, and the Democratic Republic of Congo.²⁹⁴ The Organization of American States (OAS) critiques the Bolivian judicial system, saying it “is not in a position to provide the minimum guarantees of fair trial, impartiality and due process, due to structural problems and, in particular, its composition.”²⁹⁵

Freedom House ranks Bolivia’s independent jury an alarmingly low score of one out of four, because while it may seem democratic, the system effectively encourages corruption. The 2020 Freedom House report reads,

Bolivia stands as the sole country that appoints justices via popular elections. However, judges on the Supreme Court, the TCP, and other entities are first nominated through a two-thirds vote in the legislature. This allowed the MAS to dominate the candidate selection process, producing a lenient judiciary. The popular election of judges has politicized and factionalized appointments, creating opportunities for corruption.²⁹⁶

By having an upper hand in who makes up the Bolivian courts, Morales, and the MAS party essentially monopolized and centralized control. “He occupies a central position”²⁹⁷, and as his reign progressed, Morales continuously broke down the Bolivian system of checks and balances and took over nearly every sector of the government. Morales’ attempts to hoard power can be traced back to his introduction of a new Constitution in 2009 which initiated a series of term limit abolitions throughout his presidency. The manipulation of presidential term limits is not just populist, but it is illiberal and undemocratic, a clear-cut sign of democratic backsliding.

²⁹⁴ World Justice Project, “WJP Rule of Law Index: Bolivia 2019”.

²⁹⁵ OAS, “Statement from the OAS General Secretariat on the Situation in Bolivia,” (Organization of American States, 2021).

²⁹⁶ Freedom House, “Bolivia: Freedom in the World 2020 Country Report.”

²⁹⁷ Alto, “How Evo Morales Stays in Power.”

3.5.2 The 2019 Presidential Election

With the greenlight from the Constitutional and Supreme courts, Evo Morales ran for a fourth term in October of 2019, “defying the very constitutional term limits he once backed”²⁹⁸, against main opposition Carlos Mesa, former Bolivian president who served from 2003 to 2005.²⁹⁹ The early results of the election seemed to suggest a race that would be too close to call and subsequently result in a run-off election, but suspiciously electoral authorities halted the publication of the vote results for twenty-four hours without any explanation³⁰⁰. When it resumed the next day, it was determined that Morales had won outright by a narrow majority³⁰¹, which would no longer require a run-off election, and officially recognize his fourth consecutive term as President of Bolivia.³⁰²

Obviously, this convenient victory was dubious at best. “In the vote’s immediate aftermath, an OAS electoral observation mission released sharp criticism of the tally that showed Morales with an outright victory, saying it contradicted independent counts and that a runoff round should go forward.”³⁰³ While the early results did not necessarily indicate Morales would have lost the election against Mesa, the results were close enough to warrant concern and uneasiness from the Morales administration, and then miraculously, and twenty-four hours of darkness, Morales emerged as the clear victor. The opposition took this suspicious triumph as a

²⁹⁸ Corrales, “From Bolivia, Sad Lessons on How to Fix Semi-Democracies.”

²⁹⁹ Carlos Mesa was born in La Paz, Bolivia in 1953. Member of the MNR party, he served as Vice President during the Gonzalo Sánchez de Lozada administration in 2002 and became President of Bolivia on October 17, 2003. His presidency was met with external and internal political pressures as he inherited a country divided by social and political unrest. In 2004, he held a “gas referendum” to determine the public’s opinion on nationalizing the country’s hydrocarbon reserves. While the outcome of the referendum was overwhelmingly in favor of nationalization, Mesa claimed the results were “invalid”, resulting in widespread protests, especially by the left-indigenous movements. In March of 2005 he resigned, after less than two full years as President. (Source: Jeffery R. Webber, “Carlos Mesa, Evo Morales, and a Divided Bolivia (2003–2005),” *Latin American Perspectives* 37, no. 3 (2010), 51–70.)

³⁰⁰ Freedom House, “Bolivia: Freedom in the World 2020 Country Report.”

³⁰¹ Morales allegedly won with 47.08% of the votes, followed by Carlos Mesa with 36.51%. (Source: *Órgano Electoral Plurinacional*, OEP.)

³⁰² Human Rights Watch, *Justice as a Weapon: Political Persecution in Bolivia*, (Human Rights Watch, 2020), 7-8

³⁰³ Freedom House, “Bolivia: Freedom in the World 2020 Country Report.”

clear example of corruption under the Morales administration, and the people took to the streets in protest. Opposition leaders utilized the equivocal results as propaganda, anti-Morales protestors clashed with Morales supporters, roadblocks were set up in major cities, and the country seemed more divided than ever in a moment of political uncertainty.

Evo Morales, in an attempt to appease the rioting in the streets, invited the OAS to audit the election results.³⁰⁴ After thorough investigation, the OAS concluded that they had found overwhelming evidence to support claims of fraud during the election. They observed “‘a series of intentional operations aimed at altering the will expressed at the polls,’ including falsification of the signatures of poll officials, electronic results being redirected to hidden servers and manipulated, and complicity of electoral officials.”³⁰⁵ The OAS reported that “‘based on the overwhelming evidence found, what can be concluded is that a series of willful actions were taken to alter the results expressed at the polls’”.³⁰⁶ This report was the final nail in Evo Morales’ coffin, confirming the opposition’s claims of voting fraud by the Morales administration and institutionalized corruption.

In the meantime, Bolivian society was at a dangerous crossroads and the people decided to take matters into their own hands. A series of violent protests broke out nationwide resulting in more than thirty deaths and over 800 injuries.³⁰⁷ Slowly, some police and military units began to

³⁰⁴ The Organization of American States is a multilateral regional organization composed of the thirty-five independent states of the Americas, along with the collaboration of sixty-nine “observer states” from around the world. According to the official website, the OAS “constitutes the main political, juridical, and social governmental forum” in the region and its main goal is to uphold its four main pillars, “democracy, human rights, security, and development.” (Source: OAS, “Organization of American States: Democracy for Peace, Security, and Development.”, 2009)

³⁰⁵ Freedom House, “Bolivia: Freedom in the World 2020 Country Report,” 4

³⁰⁶ OAS, *Electoral Integrity Analysis General Elections in the Plurinational State of Bolivia*, (Organization of American States, 2019).

³⁰⁷ Human Rights Watch conducted a series of investigations into the nationwide protests and casualties following the election results. The report describes a number of cases where anti-Morales protestors were injured or killed at the hands of supporters, and many cases of Morales supporters injured or killed by protestors and soldiers. Investigations are still being conducted to determine the severity of these cases. (Source: Human Rights Watch, “Justice as a Weapon: Political Persecution in Bolivia”)

join forces with the anti-Morales protesters, refusing to follow the government's orders. On November 10, 2019, commanders of the armed forces asked Evo Morales to step down as president and officially resign.³⁰⁸ Morales did so, along with Vice President Álvaro García Linera, and sought asylum in Mexico and later Argentina, but denounced that he had been unjustly overthrown by a military coup. According to him, the intention of those responsible for the coup were not just to overthrow Morales, but to ruin the country's prosperity. He tweeted, “[l]os golpistas llegaron con violencia al gobierno para robar con corrupción y nepotismo y endeudar el país.”³⁰⁹ Ironically, but not coincidentally, Morales accused the opposition of the very same allegations that his own government was criticized for.

Yet again, Morales claimed this was the work of the immoral elite who would do anything to destroy him. In an interview with journalist Jon Lee Anderson,

[Morales] insisted that he was the victim of a conspiracy, in which oligarchs in Bolivia were abetted by imperialists in the U.S. ‘They don’t forgive me, because I nationalized the natural resources,’ he said. ‘They don’t forgive me, because I reduced extreme poverty. In the capitalist system, the idea is that if you’re poor you should look after yourself, and there won’t be any social problems. But that doesn’t work in Bolivia.’ As he had done many times before, Morales accused his enemies of racism, saying that they couldn’t bear the fact that an ‘indio’ had been President.³¹⁰

They, of course, meaning the elite: the oligarchy; foreign governments, like the United States; and anyone who opposed him and subsequently supported these oligarchs. The corruption, according to Morales, was not his fault, rather he was the victim of it. The populist logic holds that anyone against the populist is thereby against the people, or, as Müller writes, “whoever does not really support populist parties might not be part of the proper people to begin with.”³¹¹

³⁰⁸ Human Rights Watch, “Justice as a Weapon: Political Persecution in Bolivia”, 9

³⁰⁹ Morales, “Los golpistas llegaron con violencia...”, Twitter, May 23, 2020.

³¹⁰ Jon Lee Anderson, “The Fall of Evo Morales,” *The New Yorker*, March 13, 2020, <https://www.newyorker.com/magazine/2020/03/23/the-fall-of-evo-morales>.

³¹¹ Müller, *What is Populism?*, 39

The interim government that took over after Morales' resignation hardly improved the situation. Shortly after taking office, the government, run by Jeanine Áñez³¹², decided to investigate nearly 600 members of Morales' administration and their families, with accusations ranging from domestic terrorism, to corruption and sedition just to name a few.³¹³ Evo Morales himself was accused of terrorism and a number of other crimes, although Human Rights Watch has found many of these allegations to be baseless and an abuse of the weak Bolivian judiciary system, which ironically Morales played a key role in impairing.

3.5.3 A Loss for Morales, a Win for MAS

The interim government put in place after Evo Morales' resignation was a temporary placeholder until new presidential elections could be held in 2020. The election was held on October 18, 2020, and there were seven candidates in the running, most notably Morales' former opposition, Carlos Mesa, and MAS candidate Luis Arce.³¹⁴ Arce was no stranger to MAS or Bolivian government; handpicked by Morales to run as his replacement, Arce served as Bolivia's finance manager for the majority of Morales' fourteen-year presidency. As finance manager, Arce was credited for being the mastermind behind Bolivia's economic boom, which saw an annual

³¹² Jeanine Áñez was born in 1967 and raised in Beni, the second largest state in Bolivia after Santa Cruz. In 2010, she was elected Senator representing the party *Plan Progreso para Bolivia -Convergencia Nacional* (PPB - CN), and then became the second vice president of the Senate. She assumed the interim presidency in 2019 while the country prepared for the 2020 general elections following Morales' dismissal. (Source: El Deber. "Quién Es Jeanine Áñez, La Nueva Presidenta De Bolivia," *EL DEBER*, December 11, 2019, https://eldeber.com.bo/pais/quien-es-jeanine-anez-la-nueva-presidenta-de-bolivia_156247)

³¹³ Human Rights Watch, "Justice as a Weapon: Political Persecution in Bolivia", 17

³¹⁴ Luis "Lucha" Arce was born in La Paz, Bolivia in 1963. Arce studied economics and worked as a market analyst for the Central Bank of Bolivia during the late 1980s and 90s. He later went on to form part of the circle of economists and socialist activists that would develop the MAS economic plan. In 2005 he was asked to serve as one of the leading members of Evo Morales' economic team, and he oversaw the programs until the end of the Morales administration. (Source: Jeff Wallenfeldt, "Luis Arce," *Encyclopedia Britannica*, 2021.)

increase of nearly five percent between 2006 and 2018.³¹⁵ By Arce's side, David Choquehuanca ran as vice president. Morales' foreign minister from 2006 to 2017, and a member of the Aymara indigenous group, Choquehuanca, like Morales, is a well-known indigenous rights advocate. While Morales may not have been able to run in the 2020 election, his party undoubtedly kept his spirit alive in their candidate choice.

Luis Arce won the 2020 presidential election in an overwhelming majority, present results a feat not even the greatest MAS optimists could have imagined. Freedom House reported:

The results of the October 2020 poll showed a clear victory for MAS candidate Luis Arce, who won over 55 percent of the vote, precluding the need for a runoff. Former president Mesa won 28 percent of the vote. Voter turnout was recorded at 84 percent. Multiple independent observer missions, including one from the OAS, deemed the poll credible and fair, and competing parties and civil society stakeholders accepted the results.³¹⁶

For Morales loyalists and MAS supporters, the results were more than a victory, they were a testament to the successes of the previous fourteen-year administration. Arce's victory was certainly a tribute to the achievements of the previous administration, but I argue that the key distinction to his victory lies in the leader. Under Morales' administration Bolivia saw many beneficial changes, most notably the economic boom and decrease in inequality and poverty. These were incredible advancements that deserve merited recognition, but Morales' power-hungry and undemocratic populist tactics cannot be ignored as they were the sole reason for his downfall.

In Luis Arce, the people saw the spirit of a MAS candidate that they memorialized and loved, without the tarnish of populism. In short, Arce was not Morales, and that did him a great service. Arce embodied everything that the people remembered and appreciated in MAS

³¹⁵ Paul Nagovitch, "Explainer: Presidential Candidates in Bolivia's 2020 Special Elections," *Americas Society/Council of the Americas (AS/COA)*, September 22, 2020, <https://www.as-coa.org/articles/explainer-presidential-candidates-bolivias-2020-special-elections>.

³¹⁶ Freedom House. "Bolivia: Freedom in the World 2021 Country Report." Freedom House, 2021.

leadership with a less radical rhetoric than his predecessor. Essentially, his victory demonstrated “voters wanted a resumption of Morales’ social and economic policies, aimed at ending Bolivia’s widespread grinding poverty, but without the polarizing former leader’s autocratic tendencies.”³¹⁷ By staying away from populist language and tactics, Arce presented himself as a more moderate MAS candidate, which worked to his advantage. He strayed away from the embellishment and revolutionary character that people associated with Evo Morales and maintained a humble composure, leading with a campaign that focused on socio-economic reform. A revival of MAS’ fundamental triumphs without the scandal.

His role in Bolivia’s economic success during the Morales administration made him the perfect candidate to attract hesitant voters who may have skepticism after Morales’ fall but are nostalgic for Bolivia’s golden years. The challenge for Arce will be to prove that he will be able to deliver on the people's hopes, especially in a time of national and global uneasiness. “Arce will also have to prove that his economic model—one of the trump cards of the MAS in its decade and a half in power—works as well in times of economic crisis, uncertainty, and pandemic as it did during the commodity boom.”³¹⁸ He must simultaneously distance himself from the previous government while also using it as proof of his capabilities.

The demonizing maneuvers of the interim government certainly helped Arce and MAS’ cause and played a role in their success as well. The government used an overly radical narrative to portray Morales and the MAS party as an overly corrupt force that tried to destroy Bolivian democracy. NACLA journalist Pablo Steffoni writes,

From the start, the Añez regime demonized the MAS, trying to reduce the party to a ‘narcoterrorist’ force and characterizing its administrations as an awful mix of authoritarianism, corruption, and

³¹⁷ Simeon Tegel, “Arce Continues to Weaponize Bolivia's Courts,” *World Politics Review*, July 7, 2021, <https://www.worldpoliticsreview.com/articles/29783/under-arce-bolivia-courts-are-still-being-weaponized>.

³¹⁸ Pablo Stefanoni, “A New MAS Era in Bolivia,” NACLA, October 21, 2020, <https://nacla.org/news/2020/10/24/new-mas-era-bolivia>.

waste, a far cry from the images of economic success broadly held before Morales's overthrow by even international financial agencies.³¹⁹

The interim government certainly had reason to criticize the Morales administration for their democratic backsliding and the institutional disintegration, but MAS was able to turn the critique around and portray it as an exaggeration. MAS was able to use this witch hunt to their advantage when it came time for the official presidential election, claiming their party had been the victim of an unjust and false judgment. Áñez' interim government was also heavily criticized by the people and opposition governments for their handling of the Covid-19 crisis, giving MAS another leg up in the 2020 presidential elections.³²⁰

3.5.4 The Curtain Close

Whether or not Luis Arce will have a successful presidency or whether the people will vote him for another term is yet to be determined. As he approaches the one-year mark of his presidential victory, Bolivian foreign policy has remained rather modest, most likely overshadowed by the global covid-19 pandemic and the victory of neighboring Peru's leftist President Pedro Castillo³²¹. What is clear is the distinction that has been made between Evo Morales and his party, MAS, confirming that the reputation of a leader does not necessarily characterize the party he represents. Mudde writes, "MAS is a strong political organization, which, despite its loyalty to Morales, has different factions and an institutional structure across

³¹⁹ Stefanoni, "A New MAS Era in Bolivia."

³²⁰ Freedom House, "Bolivia: Freedom in the World 2021 Country Report."

³²¹ Pedro Castillo took office July 28, 2021 after winning the Peruvian Presidential Election against opponent Keiko Fujimori, daughter of the infamous neo-liberal Peruvian populist Alberto Fujimori. The election was a very polarizing debacle with both major candidates engulfed in corruption scandals, endangering the survival of Peru's longest standing democratic period since the country's independence. (Source: Paulo Sosa-Villagarcia, and Gabriela Camacho, "Peru's Democracy Is at a Breaking Point," *Foreign Policy*, July 17, 2021, <https://foreignpolicy.com/2021/07/15/peru-democracy-president-pedro-castillo/>).

the whole country.”³²² Bolivians were satisfied with the progress made, but it was time to say goodbye, and Morales was seemingly unwilling to accept the end of his era.

This is the reason Morales’ supporters are departing: Not because the economy bottomed, or because he has not accomplished what he’d initially promised, though there is discontent in various quarters. Rather, just as his first election represented an important democratic victory—perhaps the most significant in Bolivia’s modern political history—his push for a fourth term has come to stand for the subversion of those same principles.³²³

The Bolivian people revolted against Morales’ after his final attempt to run for another term despite the public having voted against it in an overturned referendum. His attempt to hoard power for another term despite the people voting against the decision was proof that he was no longer the “President of the People”, rather a populist grappling with defeat. Morales’ defeat may have prevented Bolivia’s democracy from backsliding any further, but that is with the assumption that MAS will not continue to implement anti-liberal institutional changes through Arce’s tenure, which remains to be seen.

³²² Mudde, *Populism: A Short Introduction*, 57

³²³ Juliana Barbassa, “Thanks, but Goodbye: Why Many of Evo Morales’ Supporters Want Him to Move On,” *Americas Quarterly*, April 19, 2018, <https://www.americasquarterly.org/fulltextarticle/thanks-but-goodbye-why-many-of-evo-morales-supporters-want-him-to-move-on/>.

Conclusion:

Is Evo Morales an Archetype of a Latin American Populist?

The evidence presented in this dissertation concludes that Evo Morales is the archetype of a Latin American populist. His populist strategies can be analyzed beginning with his presidential campaign and continuously developed throughout his nearly fourteen years in office. By using ethnopopulist tactics as his thin ideology to mobilize the indigenous Bolivians and an inclusionary Marxist campaign as his thick ideology to appeal to the masses, Morales secured enough support to gradually dominate executive power. Populism was the strategic tool Morales utilized to illiberally hoard sovereignty until he was forcibly removed from office by the people.

Cas Mudde defined populism best when coining the term, a “thin-centered ideology”, malleable enough to conform to nearly any anti-system campaign. Populism, in which case, can be viewed as a tool that leaders employ, and it can be very persuasive and attractive under certain circumstances. Latin America is the region with the greatest tradition of populism, with a number of examples in nearly every country spanning over the course of the last 150 years.³²⁴ Latin American populism can be divided into different periods characterized by their distinct common motifs: *caudillo*-era populism; neo-liberal-era populism; and socialist-era populism. It is my analysis that Evo Morales’ presidency is the epitome of the latter, as he combined ethnopopulist tactics with a Marxist ideology to secure popular support and power.

Populism can emerge as a seductive option in fragile democracies undergoing crisis or a period of instability, making Bolivia the perfect hatchery. After nearly two decades of economic instability and political discontentment, Bolivians were desperate for an alternative and for prosperity. Bolivia’s economic crisis in the 1980s was one of the worst debacles of the twentieth

³²⁴ Mudde, *Populism: A Short Introduction*, 27

century, and by the end of the decade, Bolivia was the poorest country in South America.³²⁵ Evo Morales presented himself as the ideal political outsider to transform Bolivia by utilizing populist strategies to gain popular support. Morales' discourse relied heavily on the "us" versus "them" distinction, separating society into two homogenous groups, which is the classic mobilization method of any populist leader.³²⁶ He affiliated himself with the "pure people" group through socioeconomic and cultural characteristics and identified the "corrupt elite" as being imperialist foreign organizations that have oppressed the Bolivian people for centuries.

Morales manipulated ethnopopulism to secure support and mobilize the masses against a common enemy. As a respected and well-known member of one of the largest indigenous tribes in Bolivia, born to a lower, working-class family, Morales used his ethnicity and personality to form a bond with the underprivileged communities. He utilized cultural symbols significant to the Bolivian indigenous communities, such as the *wiphala* flag, coca leaves, and indigenous languages, specifically Aymara and Quechua, to legitimize his connection to the communities. As populists are unequivocally antipluralists,³²⁷ Morales also claimed that he was the true representation of the people and if he was succeeding, so would his supporters because he is not just their representation, but he is the "pure people". In fact, even Morales' twitter handle is "@evoespueblo", meaning Evo is the people. Beyond appealing to the indigenous people, Morales also incorporated inclusionary populist methods to draw in the mestizo and working-class sectors of society by presenting himself, and his political party MAS, as a political outsider on the side of the "pure people", which he defined in broad terms.

Resource nationalism played an important role in his populism, allowing him to identify foreign elites as the clear enemy exploiting the Bolivian people by taking advantage of their

³²⁵ Morales and Sachs, "Bolivia's Economic Crisis", 57-59

³²⁶ Mudde, *Populism: A Short Introduction*, 6

³²⁷ Müller, *What is Populism?*, 38

natural resources and simultaneously attract a wider variety of Bolivians who may not identify as indigenous or mestizo. Through this Marxist-nationalist discourse, Morales manipulated the emotional connection between the Bolivian people and resource nationalism to unify “the people” together against the imperialist enemy. Bolivian resource nationalism is the belief that “Bolivian poverty persists amid abundant natural wealth, meaning that it can be explained only as a result of the theft and looting of that wealth by outsiders, including foreign capitalists and domestic elites.”³²⁸ The claim that was foreign elites had taken advantage of Bolivia since its inception via colonialism, land wars or the “theft” of natural resources. The culmination of all these factors resulted in a national sense and narrative of humiliation and resentment, which Morales used to his advantage during his presidential campaign.

His thin-centered ethnopopulism and thick-centered Marxist-nationalist campaign were mobilization tactics to attract the greatest number of Bolivian voters and pit them against the morally corrupt elites. These tactics were also used by Morales to manipulate the Bolivian political and electoral system in his favor, which would later result in an illiberal breakdown. Through a series of autocratic and corrupt methods, Morales undermined the democratic system of checks and balances to grant himself increasing power. As is common amongst Latin American populists, Morales proposed a series of referendums and re-wrote the Bolivian Constitution in 2009, essentially giving him the authority to run for president for a third term. Referendums are convenient tools used by populists to alter laws quickly under the guise of “popular vote”.³²⁹ This act was confirmation of the developing democratic erosion, where populists will revise democratic institutions that protect the fundamental rights of the people and security of the system.³³⁰

³²⁸ Brienens, “A populism of indignities: Bolivian populism under Evo Morales.”, 85

³²⁹ Mudde, *Populism: A very short introduction*, 84

³³⁰ *Ibid*, 91

By the end of his terms in office, it was evident that Evo Morales' populist presidency had resulted in democratic backsliding. Javier Corrales writes in his article entitled, "From Bolivia, Sad Lessons on How to Fix Semi-Democracies",

Bolivia was experiencing what has come to be known as democratic backsliding, a process whereby an existing democracy gradually acquires authoritarian features — never fully becoming a full-fledged dictatorship, but significantly undermining checks and balances and pluralism.³³¹

Morales attempt to monopolize power was illiberal and his refusal to relinquish the presidency despite having lost a referendum and an election was totally undemocratic. Morales used populism as a strategy to hoard power and repeatedly undermined Bolivia's political system. As his reign progressed, Morales' position solidified as he centralized the control and broke down checks and balances.

His re-writing of the Constitution, nationalization movements, and increasing nepotism are all typical examples of how his populism progressively developed undemocratically. In most cases of Latin American populism, the leader must be forcibly removed in order for the democratic system to be rebuilt, and the instance of Evo Morales is no different. Morales deliberately ran for President in 2019, refusing to accept the popular referendum which denied him another presidential term, and despite his "win" being determined fraudulent, he claimed the results were a distorted conspiracy against him. As is commonplace amongst populists, any criticism or failure they experience can be dismissed as conspiracy by the morally corrupt elite to destroy them and take advantage of the pure people the populist represents.³³²

Although Morales may have disregarded the criticisms of his administration and wrote off the protests which forced him from office to be an elitist conspiracy against him, the data which analyzes the democratic breakdown of Bolivia under his administration does not lie. The Rule of

³³¹ Corrales, "From Bolivia, Sad Lessons on How to Fix Semi-Democracies."

³³² Müller, *What is Populism?*, 75

Law Index 2019 report of Bolivia indicated it was one of the most corrupt countries in the world, giving it an overall score of 0.38 out of 1.0, ranking it globally at 119 out of the 126 countries studied.³³³ According to this report, Bolivia ranked lowest in corruption and criminal justice, which can be traced back, for the most part, to Bolivia's failing and biased system. The 2020 Human Rights Watch Report, *Justice as a Weapon: Political Persecution in Bolivia*, reported "former president Evo Morales repeatedly rejected judicial independence", and that, during his administration, several politically motivated charges were brought against Morales opposition rivals.³³⁴ MAS members occupied the majority in nearly every branch of government, diluting the system of checks and balances and crippling the power of the opposition to make their opinions heard.

It is for the aforementioned reasons Evo Morales must be considered the epitome of a Latin American populist. He portrayed himself as the best representative of the people, used the personal connection he established to mobilize them in his support, and then manipulated that growing power to subvert the Bolivian democratic system under the guise of popular legitimacy. At the first threat of criticism, he has attempted to justify his populism by focusing on the "benefits" the country has experienced during his presidency. However, while Morales continues to argue that Bolivia under his administration saw economic and social improvements, especially for the lower classes and indigenous communities, these advancements were both material and short-lived. More importantly, economic success, however palatial, does not validate illiberal rule and the backsliding of democracy.

Evo Morales' presidency exemplifies the degradation of liberal democracy as the result of populist leadership. The rapid development and eventual failure of Morales' presidency is a testament to the dangers of populist rule. Mudde may have claimed that populism can potentially

³³³ World Justice Project, "WJP Rule of Law Index: Bolivia 2019".

³³⁴ Human Rights Watch, *Justice as a Weapon: Political Persecution in Bolivia*, 1

serve as a corrective for liberal democracy, but the Morales example backs the Müller analysis deeming populists “a real danger to democracy”.³³⁵ Morales claimed that, due to his ethnic and socio-economic connection to the people, he was their voice and had their best interests as the forefront. What the end of his reign demonstrated was that no matter what the pretense intention of a populist, the ends do not justify the means. Populists eventually end up dismantling the system of checks and balances and uprooting the democratic establishment unless they are removed from power. Evo Morales will not be the last Latin American populist, and he may not be the most (in)famous, but his legacy holds significant importance in the study of politics and populism. At the very least, the Morales regime causes us to ponder what the real root cause of the popularity of populism may be, and why it is still so attractive today.

³³⁵ Müller, *What is Populism?*, 174

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