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Weak Societal Roots, Strong Individual Patrons? Patronage & Party Organization in Portugal

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We examine why patronage may constitute an important dimension of analysis in the study of Portuguese political parties and the evolution of its party system. In particular, we are interested in exploring two inter-related aspects: first, what is the role of patronage for party organisations in Portugal? And second, how does it impact on intra-party functioning? Overall, access to state resources appears to be crucial in the rapid building of the party organisations and in their subsequent maintenance, potentially creating also barriers to entry for new competitors. This pattern is to a large extent explained by the context in which parties emerged in Portugal, which substantially shaped their organisational structure and societal roots.
Keywords: Party; Patronage; Appointments; Portugal.

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A patronagem tende a constituir uma dimensão importante de análise no estudo dos partidos políticos em Portugal e a evolução do seu sistema partidário. Em específico, interessa-nos explorar dois aspectos inter-relacionados: primeiro, qual o papel da patronagem para as organizações partidárias; e segundo, qual o seu impacto nos padrões de funcionamento intra-partidário? Concluímos que o acesso aos recursos do Estado emerge como um factor central na formação de organizações partidárias e na sua manutenção posterior, potencialmente gerando também barreiras à entrada de novos competidores. Este padrão é, em larga medida, explicado pelo contexto em que os partidos políticos surgiram em Portugal, que influenciou substancialmente a sua estrutura organizacional e raízes sociais.
Keywords: Partidos; Patronagem; Nomeações; Portugal.

Introduction

Political parties have undergone considerable change over the post-war period. In particular, the apparent weakening of parties' social rooting appears to have been compensated through the usage of state resources, generating incentives for an increasing usage of patronage by party organisations. As Blondel (2002) refers, this patronage dimension constitutes an understudied dimension of contemporary political parties.

Conventionally associated (or even conflated) with clientelism, more recent theoretical work suggests that patronage is indeed taking new forms. In particular, it appears to be a key resource for political parties in retaining their role as 'public utilities' (van Biezen, 2004), not only by shoring up party organisations, but also providing parties leverage over (and information within) increasingly fragmented and delegated processes of policy-making (Rhodes, 1996; Pierre & Peters, 2001). As such, patronage emerges as a crucial dimension in analysing both policy-making and the role and nature of political parties.

Portugal has structural features which make it particularly interesting within the comparative perspective with regard to the role of patronage. The constraints of the democratisation period precluded political parties – especially those which have subsequently dominated government – from building organizational structures based on strong societal roots. Yet despite this, parties were able to build their organisations quickly, in turn contributing to the rapid consolidation of the Portuguese party system and its remarkable resilience since (Jalali, 2007). Parties' dominance does not appear to have weakened over the past twenty years (as can be seen, for instance, at the electoral level), despite survey work showing low levels of citizen trust in parties. Access to state resources appears to be crucial in the rapid building of the party organisations and in their subsequent maintenance, potentially creating also barriers to entry for new competitors.

This article –part of a broader project on political patronage– examines why patronage may constitute an important dimension of analysis in the study of Portuguese political parties and the evolution of its party system. It develops two inter-related aspects that the research project seeks to elaborate on, namely what

is the role of patronage for party organisations in Portugal, and how does it impact on intra-party functioning?

1. The evolving forms of patronage

The theoretical literature reveals an ambiguity of the concept of patronage, especially when compared to clientelism politics. The distinction between the two concepts is not easy to draw: generally speaking, clientelism means the distribution of selective goods, while patronage underlines a more specific phenomenon, namely the distribution of offices in the public administration (Piattoni, 2005). Both however entail a variety of practices that may sometimes overlap or complement each other.

As Kopecký & Mair (2006) indicate, the "clientelistic" form of patronage is expected to disappear as political and economic modernisation takes place. Yet what recent theoretical and empirical work suggests is that patronage has not disappeared, but rather potentially taken on new forms – notably, as an organisational and policy control resource for parties – that move it (at least partly) away from the clientelistic reward and exchange underpinning it traditionally had.

In this sense, political patronage –defined here as the power to make appointments to positions in both the public and semi-public sectors - following Kopecky & Mair (2006)– can serve at least two key and inter-related functions for political agents in general, and political parties in particular. First, it provides a crucial resource for organisation building and entrenchment, particularly as parties' social anchoring weakens. Second, patronage becomes a key resource in policy-making, by providing loyal networks for information-gathering, policy initiation and implementation within bureaucracies. As processes of governance become increasingly fragmented, delegated and involving a multitude of agents (Rhodes, 1996; Pierre & Peters, 2001) this form of patronage is expected to replace its traditional, exchange-type counterpart. In a sense, then, patronage becomes a key resource for political parties not merely in terms of mobilising support, but rather in dealing with a more fundamental issue: how they can retain a role in modern democratic governance.

The theoretical literature on this more modern form of patronage is closely tied to studies on party government, which examine the degree of partisan control over the formal apparatus of government (Castels & Wildenmann, 1986). This research area has focused primarily on quantitative and qualitative analysis of portfolio allocation to investigate the "partyness of government". To this end, it considers not only the distribution of ministerial positions, but also the relationship between the executive and the bureaucracy in terms of political appointments. More recently, studies on patronage have pointed to the need to expand the scope of analysis, to examine appointments in a range of public or semi-public institutions and agencies. As policy-making processes go beyond traditional bureaucracies, a concomitant shift in the locus of party patronage is to be expected.

This new perspective informs much of the contemporary analysis on both party government and party organization. In terms of the former, studies on party government have focused on the capacity of parties to colonize the state and the public administration (Blondel & Cotta, 2000). The expansion of the economic and social role of the state is seen as a huge incentive for patronage practices. The focus here then is in analysing the "reach" and "permeation" of parties in the public (including government) and semi-public sectors (Daalder, 1966). At the same time, political appointments are a means to strengthen the policy-making capacity of parties. Thus, patronage is used to acquire loyal expertise and bypass the bureaucratic system (Müller, 2006), becoming a crucial resource for party control of policy formulation and implementation (Meyer-Sahling, 2006) and serving as a means of information-gathering communication within an otherwise fragmented governance structure. Patronage also becomes more selective, with parties seeking to create, as Kopecký & Mair (2006) put it, "organisational networks of personnel which combine political loyalty with at least a modicum of technical expertise".

At the party organization level, the literature on patronage has been linked to the debate on party crisis or party decline. The increased penetration and dominance of political parties within state structures and personnel is thus seen as a means of compensating their weakness at the societal level (Katz & Mair, 1995). Following Duverger (1981), the model of party organization is an important element

in explaining how party elites can maintain cohesion. In the mass party, the high levels of ideologisation generate solidarity incentives. On the contrary, the evolution toward an electoralist party type seems to strengthen the administration of selective and material benefits in order to reward party members and generate cohesive parties. This is a key aspect when we analyze the evolution and the characteristics of political parties in new democracies: in these, we would expect to find less ideological parties and a greater emphasis on the electoral performance, which increases not only the potential for internal conflicts, but also their costs for a party. This can be related to the difficulty that parties face in securing party membership in the absence of strong social roots, and the fading of collective and ideological incentives (Dalton & Wattemberg, 2000; Mair, 1997; Scarrow, 1996). In this sense, party patronage represents a selective incentive to mobilize party members and to guarantee the survival of the party organization.

Last but not least, patronage can be used by parties to strengthen their own power *vis-à-vis* challengers. According to Shefter's (1994) thesis, there is a path dependency for internally created parties to the extent that, once in office, they will continue to rely on public resources and patronage practices. This seems to be the case of emerging parties in new democracies which have given priority to institutional resources rather than on the anchorship of a mass following– a pattern that appears to be particularly evident in Portugal (Jalali, 2002; van Biezen, 2003). In this sense, studies on party organization stress the role patronage can play as an organisational resource. Focusing on the European case, several authors have highlighted a shift toward greater patronage practices, generating a "state-centered party" (Blondel, 2002) or "public utilities parties" (van Biezen, 2004).

Naturally the usage of patronage need not be as stylised as the above depiction suggests. While a distinction emerges between high and low patronage –the former being more closely associated with the objective of policy control and organisational building, the latter closer to traditional views of patronage as reward– the former can well coexist with dyadic types of relationship between patrons and clients. Indeed, within different institutional and socio-economic contexts, parties and politicians can choose to use patronage for different types of goals. Nevertheless, patronage remains a central resource for political parties,

be it to retain relevance in the policy process, achieve mass mobilization and support, sustain party organizations, or even shore up individual political actors. As such, patronage emerges as a key –but also, as Blondel (2002) highlights, under-researched– dimension in the study of contemporary political parties.

2. Why expect patronage in Portugal?

As a new democratic regime at the forefront of the so-called 'third wave of democratisation', Portugal has some structural features which make it an interesting case for the study of patronage practices. In particular, the specific constraints of the democratization period precluded political parties –especially the parties in government– from building strong organizational structures and stable roots in civil society. To the extent that patronage is associated to a weakening social anchorage of political parties, the Portuguese case allows an examination of the role that patronage can play in the consolidation of party organisations (and beyond these, party systems) in the absence of strong social anchors.

Historical antecedents commonly influence the nature of party organization, generating path-dependencies that contribute to their present-day nature. This is particularly the case in Portugal, not only as a recently consolidated democracy but also one with a very specific process of democratization. The revolutionary context of 1974-5 under which democratisation took place was to impact directly –and strongly– on the nature of party organization. All the parties –including the PCP, the only major party functioning in Portugal on the eve of the coup– emerged as legal political organisations seeking societal support for electoral purposes within the revolutionary context. 1974-5 was, then, 'Year Zero' for political organisation in Portugal (Morlino, 1998: 209-210; Jalali, 2002: 19). The peculiarity of this context has left an indelible genetic imprint on the nature of political parties in Portugal, and in their usage of patronage. As Piattoni (2001: 25) asserts, "the urgency of the situation faced by the ruling political elites at the time of mass political mobilization determines whether or not, all other things being equal, clientelism will be the chosen strategy".

In no other Portuguese parties is this 'birthmark' more evident than in the PS and PSD. Four relevant – and related – aspects need to be highlighted, to the extent that they help understand the patterns of patronage over the past two decades. The first is the impact of the revolution on the organizational nature of the two parties. As will be shown, this helps explain their weak societal roots and catch-all nature, and consequent pressures for party patronage. At the same time, it served to reinforce the central role of party leaders and personalised –as opposed to ideological– factionalism. To the extent that factionalism and party leaders are relevant explanatory factors in patterns of patronage use (not least at the intra-party level), these dimensions are noteworthy. At the same time, the specificities of party formation, and the consequent relationship between the different levels of the parties, are also a feature that we hypothesise to be relevant in terms of the subsequent role of patronage in party and party system dynamics. Finally, the revolution's impact on parties' values and ideology is considered, to the extent that this can underpin the need for material as opposed to solidarity incentives in mobilizing party members.

At the same time, it must be noted that the usage of the state and its resources to compensate weak societal roots is not a new phenomenon in democratic Portugal. As Opello (1985: 87) highlights, patronage and clientelism were essential levers within the political system of the First Republic (1910-1926). While this patronage was essentially of a pre-modern nature, with parties as essentially groupings of clientelistic networks, with local notables or *caciques* operating at local level to ensure support for the party, incipient forms of party patronage may also be discerned, notably in the case of the Republican Party (PRP), which monopolised, with brief exceptions (generally periods of non-Democrat rule sustained by the military), political power in the First Republic.

The PRP represented a different type of party as compared to its contemporary élite-based parties of notables, presenting a more coherent organisational structure and ideological base. Yet it never fully developed these featured beyond an embryonic form, if we take the mass party ideal-type as the baseline (Almeida, 1991: 126-7). Rather, it was to resemble the machine party model, with control of the bureaucracy central to the its fortunes. The lower ranks of the civil servi-

ce and the armed forces served as the main resource for rewarding supporters, becoming the bases of Democrat electoral dominance, resembling the American spoils system (Wheeler, 1978: 160). Following the May 1919 electoral victory, 17,000 Democrats were placed in the city of Lisbon's civil service; overall, the national civil service almost doubled between 1911 and 1930, with over 105,000 people employed in 1930 (Wheeler, 1978: 161, 165).[1]

2.1 The Revolution's Impact on the Parties' Weak Societal Roots and Catch-All Nature

The movement that ended the *Estado Novo* was far from being a coherent or cohesive one. Its primary grievance had to do with the regime's intransigence to negotiate over the decade-long African wars. Unable to alter policy from within, the army was finally to dismantle the *Estado Novo*, but there was little forethought (and much less agreement) on what should succeed it (Carrilho, 1985: 467). The coup thus quickly gave way to a convoluted revolutionary period, where the main goal was the definition of regime-type, of how Portuguese society should be organised and governed. Regime-choice thus became the central conflict in Portuguese politics in the revolutionary context of 1974-5.

As Schmitter (1999: 297-8) posits, in revolutionary transitions 'an exaggerated form of political causality tends to predominate, in a situation characterised by rapid changes and indeterminate strategic options'. The degree of uncertainty facing the political parties was substantial until the 25 November 1975, when the regime-choice conflict was essentially settled in favour of liberal democracy – in partial contrast for example with Spain, with its élite-led, 'soft-landing' transition. Parties thus developed as organisations in a context where the most pressing issue was regime-choice, and this became the primary node of action for them.

With weak and unconsolidated organisations, the parties in favour of liberal democracy (and notably among them, the PS and PSD) had one trump card to play against the PCP's organisational solidity and Leninist strategy: that of demons-

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1   Part of the increase, however, must be attributed to the post-1926 military dictatorship.

trating a wide social support, signalling to the PCP and orbiting (but not always friendly) *groupuscules* the real risks of a forced take-over. Thus, in the context of 1974-5, a broad and shallow support base was preferable to a deep but narrow one, and programmatic consistency a luxury these parties could ill-afford. While the CDS's more obvious ties to the old regime placed it offside for much of the electorate, the PS and PSD successfully appealed on an interclassist, catch-all line. This was facilitated by the weakness of the class and religious cleavages –an enduring feature of the Portuguese political landscape. While the potential for traditional social cleavages existed– as highlighted by Gunther and Montero (2001: 124) –these were weakly articulated and politicised when the 25 April occurs. The PSD– along with the Socialist Party – was thus to develop as an organisation in a context where the regime-choice issue was the primary node of action, rather than developing mass organisations designed to mobilise and represent well-articulated social divisions.

In such a context, parties were willing to use all the resources at their disposal in order to see their preferred regime-type prevail, and patronage was one of these. In particular, parties used their position in power and their ties with the military to guarantee protection for their people, in a context where legality and the police essentially stopped functioning (Cerezales, 2004).

After 1974-5 and the resolution of the regime-choice conflict, the main centrist parties continued to adopt selective material incentives rather than creating strong ideological bases and support. The endurance of this pattern is not solely explainable by path-dependency effects. A coordination game also emerged between the two centrist parties, the equilibrium being a catch-all strategy for both PS and PSD. As in any coordination game, the alternative strategy –in this case, of clearer ideological demarcations and deeper social support– would prove costly, most likely resulting in the shedding of electorate and electoral losses, at least in the short-run. Neither party (and above all, neither party's leader) was willing to take that risk: as Kirchheimer (1966) had predicted a decade earlier, shallow but wide support could win elections, deep but narrow could not.

This lack of deep societal roots has meant that both parties have always acted more as 'institutional than as social [actors]' (Pridham, 1990: 113). This was par-

ticularly intensified as the regime-choice conflict subsided. In Panebianco's typology (1988: 207), this weakened further still the system of solidarity (with its collective incentives, and rational, ideological aim – in this case, regime-choice), and led to its replacement by a system of interests, with selective incentives for participation.

Prevalence of Party in Public Office and the Importance of the Party Leader

As Burton et al (1992) stress, in a convoluted situation such as that of Portugal in 1974-5, party leaders play a necessarily critical role. The centrality of the party leader was accentuated by the early institutional role gained by the PS and PSD, as was the dominance of the party in public office.

The first provisional government of the Second Republic, installed on 16 May 1974, was to contain ministers from the PSD, a mere 9 days after the party's public formation, when it had barely any organisational structures. Indeed, the PSD initiated informal contacts for participation in government *before* its formal creation (Sousa, 1983: 243). The case of the PS is not dissimilar. The ASP (Portuguese Socialist Action, which became the PS in 1973) did not have any clandestine structures in Portugal, nor paid party workers ("*funcionários*"). A clear pattern of prevalence of the party in public office over the party in the grassroots thus emerges, as the organisational structures of the parties were developed by a phantom party already in office, rather than by building organisation to win power. This pattern generates substantial incentives for the usage of patronage. The Portuguese parties obtained office – and thus, the capacity to dispense patronage, even if it this took on different forms during the revolutionary period – early on. In the absence of ideological bonds or organisational structures, patronage constituted an important element in building, sustaining and controlling party machinery.

At the same time, the centrality of the party leader in both parties was reinforced, contributing to the central role of party leaders and personalised factionalisation at the top. In both cases, the parties became virtually synonymous with their party leaders who had great visibility as ministers – Socialist leader Soares as foreign minister, while PSD founder Sá Carneiro was a minister without portfolio. In a context of widespread mass media, this presence in government took

on additional importance. Accounts from the protagonists of the period highlight the importance of television in Portuguese politics during the revolutionary period (viz. Amaral, 1996; Soares in Avillez, 1996a: 330. 479-481). As former party leader Marcelo Rebelo de Sousa (2000a:13) was to write about the PSD, the party was born on television.

The impact of patronage on parties is particularly relevant in fluid and personalized contexts, where political organisations remain are weakly institutionalised and frequently replaced with (or at the very least, complemented by) informal linkages. In such contexts, patronage can serve as an instrument for stabilising fluid internal relations, but can also accentuate factional conflicts, making privileges and private prerogatives the basis of political action. At the same time, the presidentialisation of politics in general can also accentuate the usage of patronage as a policy control mechanism. To the extent that it is leaders rather than parties that are judged at elections, the former will have considerable incentives for a more direct (and personal) control of the policy process.

2.2 AUTARKIC PARTY DEVELOPMENT

As a result of their recent and to some extent ahistorical formation, parties began in 1974 with very few resources – be it material, ideological or human. Developing such resources from a societal basis is a costly and slow process; given the pressing needs of the revolutionary context, it was easier to absorb existing networks. Yet this absorption of figures and networks associated or close to the old regime –particularly the Church and local notables in rural and northern areas– was by no means directed or even entirely controlled by the party at the centre. With an incipient organisation, needing to rapidly develop its own organisational structure yet without the time or resources to do so, the parties were happy to take support from where it came, notably from pre-existent local and regional networks.

Patronage became an important element for building the party organisation and for attracting local networks. In the wildly oscillating revolutionary context of Portugal in 1974-5, after a *transicion por ruptura* which enabled political purges

from public administration, party patronage served above all as a mechanism of protection rather than of distribution of jobs. This point is highlighted by Freitas do Amaral – then leader of the CDS, the one subsequently relevant party that was excluded from these provisional governments – who identifies the late formation of the CDS (which meant it was not represented in government) as a crucial factor for the party's fortunes. As he argues, the CDS thus lacked the protection of being a party of government, making it vulnerable to attacks in the revolutionary context. Furthermore, "from north to south, the people who would most naturally have identified with the ideas and discourse of the CDS went over to the PPD, which for many was an essential form of 'life insurance' or 'job insurance'" (Freitas do Amaral, 1996: 166-7).

At the same time, and particularly as the revolutionary period was resolved, these sub-national party levels emerged with a certain degree of autonomy *vis-à-vis* the party at the centre, helping underpin subsequent patterns of stratarchical party organisation. As will be seen, their access to patronage power – with the development of sub-national levels of political power in Portugal post-1974 – constitutes a crucial element in understanding relations between the national and sub-national parties. A good example of this pattern – notably, of a coopted pre-existent network, that then uses access to sub-national to autonomize itself from the national party leadership is the PSD in Madeira, which has used its monopoly of political power in the Regional Autonomy to assert its position *vis-à-vis* the central party leaderships.

Impact on parties' values and ideology

The significant shift leftwards of the revolutionary period skewed Portuguese parties' ideological positionings, at least nominally. Parties adopted programmes, ideological positions, and even names that did not (and do not) reflect their true ideological positioning. This helps explain, for instance, why the main centre-right party is called the Social Democratic Party. Indeed, the PSD initially attempted to join the Socialist International, and claimed to aim at developing a socialist society (Sousa, 2000*a,* 2000*b*).

The reasons for this lie largely with the atmosphere and needs of the time. For the parties of the liberal democratic camp such skewing was a crucial form of defence against the radical leftist coalition within the military, protecting them from accusations of being reactionary counter-revolutionaries. Yet this has had implications beyond merely misleading party titles. It led to initially ideologically heterogeneous party memberships, particularly in the PSD and PS. Although their true position was gradually clarified, not least via sizeable cisions, this pattern still persists.[2]

Second, it set a pattern of relative unimportance of party programmes, largely disregarded and clearly subordinated to the indications, discourse and personality of party leaderships. Indeed, the ambiguous nature of PS and PSD is reflected in Portuguese electoral behaviour. As the recent Portuguese electoral studies have demonstrated, PS and PSD voters are virtually indistinguishable by class or religion. Rather, it is short-term factors – notably, evaluation of party leaders and government performance – that emerges as a strongly significant predictor of voting behaviour, when PS and PSD voters are compared (Lobo, 2004). This further reinforces the role of patronage and the usage of selective material incentives for intra-party functioning, while giving greater room for manoeuvre to the party leadership, which may also impact on the usage of patronage in intra-party dynamics. In the next section, we examine the role that patronage appears to play in Portugal, first in terms of party entrenchment, both at the local and national levels; then in terms of its impact on the nature of the Portuguese party system.

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2   Indeed, the current leader Luís Filipe Menezes stated in his earlier bid at the April 2005 party congress that if elected he would reposition the PSD in the centre-left of the ideological spectrum.

3. Patronage and parties in Portugal

The issue of political patronage in Portugal remains an understudied one. At the theoretical and empirical level, studies on ministerial elites and core executive functioning have shed light on government discretionary power for appointments (Portas & Valente, 1990; Almeida et al., 2003; Lobo, 2005), but are naturally constrained by their more specific focus. Studies on clientelism suggest an allocation of top positions according to partisan affiliation (Lopes, 1997), but provide relatively limited evidence, and do not fully specify or analyse who is appointed, how and why. These contributions tend to suggest that party leaders have great freedom in nominating people to government positions, whereas the appointments to other public or semi-public institutions are made according to partisan criteria. However, this literature does not concentrate on the use of patronage as an organizational resource for political parties at both the national and the local level.

Regarding political appointments outside the confines of the executive and the legislature, no systematic studies have been undertaken on the relationship between governments and the public administration. The existing work does, however, point to a politicization of the civil service and a widespread use of cooptation and personal linkages to recruit civil servants (Araújo, 1999; Cruz, 2002; Nunes, 2004). The work of Nunes (2004), which examines the profile of top civil servants is of interest here: nominees to top administration positions are highly qualified (more so than the generality of European countries), but their nominations are also highly politicized, a pattern that does not infirm Kopecky & Mair's prediction of patronage as a mechanism of control in the policy process.

Overall, some patterns appear to emerge in the relationship between parties and patronage. As is true of other Southern European countries[3], the state and its resources have been central in compensating for the weak organisation of Portuguese political parties, to the extent that Morlino (1998: 255) has argued that: "The importance in the consolidation process played by the resources of the public sector (…) leads to the categorisation of Portugal as a case of state consolidation."

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3   For France, see Lewis and Sferza (1987: 112); Spain (Morlino, 1998: 226-7); and Italy (Morlino, 1995: 335, 340, 354). For France and Italy comparisons, see Tarrow (1974, 1977).

One of the oft-used indicators for patronage is the growth of the public sector. In the Portuguese case, the growth of public administration is well documented. The number of public sector workers more than doubled in twenty years: in 1979 it stood at 372,086, by 1999 it reached 716,418 (Araújo, 2005). The increase in public administration does not necessarily obey a purely partisan logic: Sá (2000) suggests that the increase in public administration is also largely due to the increasing complexity of the State and general socio-economic development – *viz.* the growth of the education sector. Indeed, despite this growth, the proportion of public sector workers in Portugal remained below the EU average in 2003 (see figure 1 below).

Figure 1

Public sector employment in proportion to the total employment
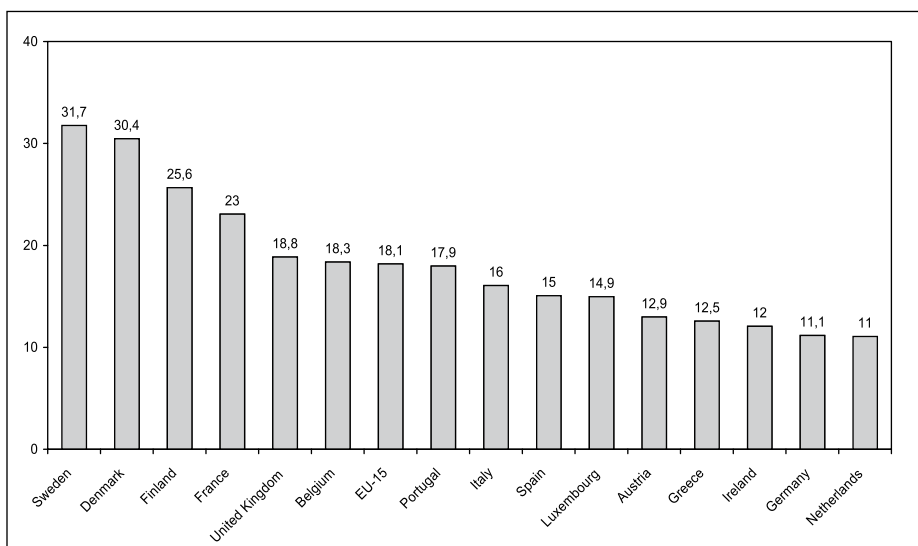
Source: Sanchéz e Bermejo (2007: 14), based on OCDE data.

Yet, as Lobo's work indicates, partisan influences may well be combined with general developmental ones, with interviewed ministers of all governments declaring that "their party exerted considerable pressure for 'their people' to be promoted in the bureaucracy" (Lobo, 2000: 163). The management of the administrative system appears thus to be (also) based on personalistic and political criteria, a logic that is no less evident in appointments to the semi-public sector

and Quangos, as with the nationalized companies in the initial period of the Portuguese democracy (Baklanoff, 1996; Sousa, 2001). This is widely documented in the literature[4], and it is admitted in personal interviews with party leaders and activists. In particular, the state serves to reward supporters and to service support networks, a perception captured by Guterres' now legendary "no jobs for the boys" proclamation after the 1995 alternation in power (Corkill, 1999: 55).

These pressures from below are particularly salient when expectations go seemingly unfulfilled. The tenure of the Socialist governments of 1995-2002 provides interesting examples of this. The PS congress of 1996, held one year after the electoral victory of the previous year, was marked by the complaints of several delegates of the difficulties they had in gaining access to members of government, especially the numerous independent ministers, perceived as less aware of internal party dynamics (Lisi, 2007). In 1999, the mayor of Braga and then-president of the Socialist mayors association, Mesquita Machado, was to criticize the minister for Public Works over the construction of accessibilities to his town, revealingly saying "*Esperava uma dinâmica diferente. Levantaram-se mil e um entraves*" (Público online, Sexta, 2 de Abril de 1999).

Another important –and relatively unexplored aspect– is the local dimension of patronage, and its importance for party functioning and party interaction. Overall, local power appears to be a major resource for party local implantation, its importance amplified when parties are out of power nationally. The capacity for local notables to dispense patronage makes it particularly difficult for party leaders in asserting their power over the local party structure when the party is out of national power and as such without patronage resources of its own.

This is highlighted in the experience of the 2005 local elections, both in the PS and in the PSD. In the latter, then party leader Marques Mendes was able to veto two local notables, Valentim Loureiro and Isaltino Morais, as party candidates in the 2005 local elections, but only after they had been formally indicted over corruption charges. Yet the local party structures were to remain loyal to Loureiro and Morais, despite the indications to the contrary from the party's central office, not

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4   See for example Bruneau and MacLeod (1986); Farelo Lopes (1997).

least because both were seen as likely victors in the local plebiscite, even without party backing. Knowing that their political survival depends more on the incumbent mayor than on the party, PSD candidates at the parish level[5] in Gondomar refused to join the party's mayoral candidate in the campaign trail. For the Socialists, the situation was rather analogous. The corruption scandal involving a Socialist mayor of the Porto district, Fátima Felgueiras led to her expulsion from the party, but this did not bar her from being re-elected in 2005, a reflection of the weakness of the Socialist Party organization and of the personal resources at her disposal.

Patronage thus emerges as an important explanatory factor in the apparently increasingly stratarchical nature of political parties in Portugal. In terms of intra-party patterns, the hierarchical view of national-local party relations (see for instance Sablosky, 1997: 62) appears to give way to a more stratarchical one, defined as where:

> Local office holders and national party elite act relatively independently of each other; 'mutual autonomy'; local office-holders ready to accept this influence by the elite in national affairs, as long as they are given a free hand to manage their own local affairs (Koole, 1996: 518)

A (fragile) equilibrium arrangement thus emerges between local and national leaders, with local bosses providing local organisation rooted in local power or a share of it, and a capacity for mobilisation for the national leaders, in exchange for lack of interference in their parochial interests.

The entrenchment of local party bosses in local power is particularly evident when a party is out of national power. The PSD experience since 1995 (when it only governed briefly, between 2002-2005, after twelve consecutive years in power, alone or in coalition) illustrates this well. The party's loss of national government altered the internal balance of power towards local notables, notably local office-holders, who retained access to local state resources and consequently also

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5   *Freguesias* – or parishes – are the primary unit of local government (Opello, 1978), of which there are presently over 4000 in continental Portugal, and are headed by the *junta de freguesia* [parish] president. *Concelhos* – numbering almost 300 in continental Portugal – are above, and comprise a number of, *freguesias*. They are headed by a mayor (*presidente de câmara*), directly elected via closed list PR. For definitions and historical background of *freguesias*, Blume (1981: 16).

patronage power. This has enabled them to reinforce their internal position, as local party bosses have gradually risen to important positions in the national party. This is reflected in the composition of the party's National Council, the number of its members who were also incumbent mayors increasing by some 50 per cent between the 1995 and 2005 party congresses. This pattern if anything reinforces stratarchical relations, granting the local party bosses greater resources in defence of their local autonomy (Pacheco Pereira, 'Grau Zero', *Público*, 6 Sep. 2001).

The balance shifts when the party is in power. While local bosses retain their parochial interests and influence, they are also highly dependent on national governments. Indeed, Portugal is one of the most centralized countries in Western Europe, and local finances are highly reliant on transfers from the central state (Le Galés, 2002: 285). The management of public resources is often based on discretionary power for what concerns transfers to local authorities. This has strengthened the personalization of party organisations, favouring informal relationships and the use of party structures for an instrumental use. Which project to support appears to be often chosen on the basis of political criteria: governments tend to favour mayors of the same party, so that they can use public funding in order to increase the possibility to be re-elected. This dependence makes local office-holders more pliant to the national party leadership when the party is in power, in order to facilitate investment in their fiefdoms. The pattern for the PSD under Cavaco Silva is a good example of this, with control of national government allowing him to largely impose his will over the various internal party networks, winning over most local notables (and, with the odd exception, exiling those he was unable to win over).

A third potential indicator of the impact of patronage –real or perceived– is party membership.

Table 1

Party membership in Portugal, 1974-2005

Year	CDS	PSD	PS	PCP	BE
1974	-	10.875	35.971	14.593	
1975	-	20.445	81.654	100.000	
1976	-	25.011	91.562	115.000	
1978	-	-	96.563	142.512	
1979	-	32.687	107.732	164.713	
1980	6.732	-	115.762	187.018	
1982	15.479	-	125.648	-	
1983	-	-	-	200.753	
1984	20.789	67.324	-	-	
1986	24.841	89.899	46.655	-	
1987	-	101.454	-	-	
1988	25.696	-	-	199.275	
1989	-	-	62.117	-	
1990	-	125.386	55.558	-	
1991	26.801	139.253	59.869	-	
1992	27.092	143.075	65.447	163.506	
1993	-	162.496	68.498		
1994	-	171.931	74.127	-	
1995	-	181.390	81.358	-	
1996	-	183.630	90.062	140.000	
1999	-	77.055	96.107	131.000	2.000
2000	40.000	87.290	124.611	131.504	-
2001	-	-	122.548	-	-
2002	-	-	66.917	-	-
2003	-	115.895	74.949	-	-
2004	-	121.420		77.500	-
2005	34.744	116.000	90.629	77.500	5.200

Fontes: 1974-1992 (all parties, except PCP 1978; CDS 1986; PS 1979-1982, 1990-92): Morlino (1995: 337); PS 1996: Sablosky (1997: 64); PSD 1993-1996: Frain (1997: 94); CDS 1986: Frain (1997: 98); PCP (1978, 1996, 1999): party's statistics; 2000 (all parties, except PS): Mair and van Biezen (2001: 19); PSD: 1999-2005: Jalali (2007a: 41); PS 1979-1982, 1990-2003: Lisi (2007: 57); 2005 (all parties) and PSD 2003: "Mais de 350 mil filiados nos partidos", *Expresso online*, edition 1775, 4 Nov. 2005; PCP 2004: "Comunistas despedem-se de Carlos Carvalhas em Almada", *Público online*, XVII PCP Congress dossier [available online <http://dossiers.publico.pt/shownews.asp?id=1209195&idCanal=1365>, consultado a 16.3.2007].

The generally low levels of party membership –when compared with the data of Mair and van Biezen (2001)– confirm the conclusion that Portugal did not develop mass parties, skipping the mass-party in its party organisation and party system development. Yet, table 1 is also consistent with Morlino's (1998: 177) assessment that a mass-membership base is not "a key element for electoral success" (Morlino, 1998: 177). While the data on party membership is far from being reliable, the tendency that emerges for the PS and PSD is that of membership growth following rather than preceding electoral success. In the case of the PSD, this is particularly striking, with the party increasing its membership almost threefold in the period 1984-1995, most of which it governed alone. The PS also saw its membership increase by more than 50 percent in the period 1995-2000, a contrast to the sluggish growth of the late 1980s and early 1990s. And the CDS saw its membership more than double, from 6,732 in 1980 to 15,479 in 1982, when it was part of the AD coalition government.

Finally, at the party organisational level it is worth highlighting the role patronage can play in intra-party factionalism. The nature of the Portuguese transition helped generate highly heterogeneous memberships that fostered considerable internal factionalism. The concentration of resources at the central state level in Portugal acts as a powerful dissuader of internal dissension, however, and party factionalisation is highly correlated with a party being in or out of power (or perhaps more accurately, with the prospect of being in or out of power).

The PSD leadership under José Manuel Barroso is a good case-in-point. Fêted as the great saviour of the party prior to his election to the PSD presidency in 1999, Barroso quickly fell from favour after the poor legislative election results of that year, and had to direct most of his attention during the following two years to controlling the party and its notables. The PSD's success in the 2001 municipal elections – more of a reflection of Socialist unpopularity than PSD support –was to mark a significant turn in his internal strength. While the PSD's success was hardly a Barroso personal victory, the resignation of Guterres– and above all, the real prospect of national power it brought – gave Barroso the internal power that had been previously denied. This effect is visible in the elaboration of the PSD lists for the 2002 legislative elections, in which the PSD leader was able to

stand his ground against local notables (*'PSD de Beja mantém Lista de Candidatos'*, *Público online*, 30 Jan. 2002). The effect of patronage power in quelling internal conflict is also apparent in the three party congresses Barroso contested as party leader. In 2000, Barroso maintained the party leadership in a closely-fought and occasionally vitriolic party congress, against Santana Lopes and Marques Mendes. The two subsequent party congresses, in July 2002 and May 2004 –with the PSD now back in power– were in contrast placid affairs, with Barroso unopposed for the party presidency.

The appointment of Santana Lopes as party leader when Barroso departed for Brussels is another recent indication of the cohesion that power brings to Portuguese parties. Few observers of Portuguese politics in the nineties would have seriously expected to see Santana at the helm of his party. He had become the 'eternal candidate' to the leadership after the departure of Cavaco Silva, running (and losing) against every single of his immediate predecessors as party president – first in 1995, against Fernando Nogueira (and Barroso)[6]; then, the following year, against Marcelo Rebelo de Sousa; and finally in 2000, against Barroso.

With voluble political past, he was perceived (particularly within upper echelons of the party) as unreliable and unserious, and hardly "leadership material", despite his populist appeal (also at the internal level). That he was to escape the role of troublesome yet inconsequential internal *bête noire*, despite the pressures from several quarters –not least the presidency of the republic– is largely linked to the PSD's being in power at the time. The few dissonant voices were thus drowned out by the appeal for the maintenance of power from the party apparatus. The overwhelming majority of the party's regional structures subscribed a document of support to Santana Lopes in June 2004. Ironically, the preference for Santana option was also explained by the argument that a more drawn-out selection process would strengthen the PS and give the president the opportunity to dissolve parliament ("Sociais-democratas preocupados com o futuro Governo", *Público* online, 30 Jun. 2005).

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6   Santana Lopes presented a list to the XVII party congress of 1995, though he dropped out at the last minute ("Congressos do PSD", *Público online*, 8 Jul. 2002).

But the Santana leadership also highlights how the prospect of being out of power can reignite internal dissension. After the dissolution of December 2004 – and with polls predicting a heavy defeat in the ensuing legislative elections – Santana Lopes rapidly saw the recrudescence of internal opposition, with the most public slap in the face being Cavaco Silva's refusal to appear in a PSD campaign poster[7]. Given the latter's hardly concealed plans to run for the presidency of the Republic the following year, for which it would need the support of the PSD, Cavaco could hardly have afforded to alienate the party leader if he expected Santana could win the elections and thus hang on to the leadership.

Overall, then, it seems that the nature of PS and PSD as deeply hybrid party organisations interplays significantly with the usage of patronage power. Whilst formally presenting a mass-type organizational form, in practice this constitutes little more than an outward façade. In a sense, then, PS and PSD constitute a 'hollowed-out' mass parties, with the formal structure of a mass party coexisting in practice with patterns more commonly associated to modern cadre and cartel party typologies, and their older patronage machine predecessors. Governmental patronage power is therefore openly used in order to reinforce party organisations, and this continues well beyond the initial period of party activity in democratic Portugal, be it at the local or national levels.[8]

Concluding remarks, and what remains to be done

As seen above, access to state resources appears to be crucial in the rapid building of the party organisations and in their subsequent maintenance, potentially creating also barriers to entry for new competitors. The work on Portugal thus far is consensual in pointing to the importance of the state and its resources for both party organisation patterns and successful democratisation. Moreover, the Por-

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7   "Cavaco proíbe PSD de utilizar a sua imagem", Diário de Notícias online, 5 Jan. 2005.

8   Indeed, the two are often highly interrelated, as the systematic attempts made by the PSD under Cavaco Silva (and managed by the party machine man, Fernando Nogueira), to bring over CDS cadres and notables to the PSD indicate. These were characterised by one CDS mayor as a "siege", with remaining CDS cadres admitting the pressure (Ruivo, 2000: 176; Jalali, 2002).

tuguese case is frequently used in comparative analyses, the focus being the role that patronage can play in new democracies. As such, the Portuguese experience emerges as a highly relevant case-study for further comparative work.

However, the extent and permeation of patronage in Portugal requires also more systematic analysis. The lack of reliable data naturally impairs the analyses that are made. In particular, it fails to capture how the nature and impact of patronage on political processes can evolve over time – a dimension that recent theoretical and empirical work suggests to be important – and can likewise generate significant and persistent biases in existing analyses. To the extent that perceptions of patronage appear to be important in shaping citizens' feelings towards their political system and representatives, the effect of such a bias is not merely academic.

The broader research of the project in which this article is integrated seeks to correct this, by conducting a large-scale empirical study of political patronage in Portugal. As mentioned in the previous section, patronage here is defined as the power to make appointments to positions in both the public and semi-public sectors – a definition that helps make clear the distinction between the often blurred concepts of patronage, clientelism and corruption, at least at the data-gathering level.

The project work aims at examining three inter-related dimensions, which aim to substantiate further the extent and role of patronage in Portuguese politics. First, the evolving legal framework of political nominations, in order to contextualise political patronage in Portugal over time, as well as evaluate how legal norms can entrench patronage practices. Recent examples of this are laws 2/2004 of 15 January and 51/2005 of 30 August, which legally define the extent of direct nomination. The former stipulated as levels of direct appointment top and intermediate level public administration (*cargos de direcção superior e intermédia*), whereas the latter required the intermediate level to be appointed through open competition (*procedimento concursal*). Equally, the latter legislation formally enshrines a seemingly recurrent previous practice, of substantial changes in top level civil servants when there was a government change. Thus, law 51/2005 allows (some) appointees to be removed due to a turnover in office. We are thus interested in examining how the legislative framework for political appointments has evolved over time, in order to answer three inter-related questions:

1. Is the legislative framework used to formally entrench previous standard practices of the parties in government, or is it used to establish new ones?

2. Is the legislative framework altered in a consensual manner (notably, through cooperation between the two parties of government), or is it altered in a majoritarian fashion?

3. How, if at all, is the legislation subverted to ensure partisan control of nominations?

At the same time, we are interested in examining the apparent expansion of new arenas for patronage, with the growth of the semi-public sector, which often escapes the legislative constriction of the direct public administration. This merits being examined at the national as well as local level – the rise of "municipal companies" (*empresas municipais*), for instance, appears to have significantly altered patterns of patronage at the local level in many municipalities.

Second, a quantitative evaluation of political nominations from 1974 to 2005 is necessary. Doing so will provide, for the first time, a reliable measure of the extent and permeation of political appointments over time in Portugal, and will allow us to assess more accurately a series of relevant dimensions. First and foremost, it will provide a benchmark to judge the prevalent perception of widespread use patronage. Second, it allows us to evaluate qualitative changes in the usage of patronage, notably in terms of the recourse to new forms of patronage (in the semi-public sector), and in the *reach* of patronage across the public administration structure, with this data also informing the notion that patronage can be used as an instrument of policy control. Third, by tracking the evolution of individual nominees, we will be able to test Nunes' (2004) hypothesis of a "bloco central" in public administration, whereby the same individuals generally fill positions at the top of public administration, close to the two centrist parties, and who rise or fall slightly as their party is in or out of power.

This data will permit analysing a number of relevant dimensions, such as how the usage of patronage correlates not only with the evolving patterns of the party system, but also beyond these with the process of democratic consolidation in Portugal. In terms of the former, it will be interesting to assess if the more majo-

ritarian nature of the party system since the mid-1980s has also generated a more majoritarian usage of patronage. As for the latter, the extent and depth of political appointments during the early years of Portuguese democracy will provide a pointer to the usage of patronage to entrench party organisations.

Finally, the triangulation of this data with information from interviews within political parties and public administration provides the basis for analysing the role of patronage for party organisations and in policy-making processes. The latter is, as seen above, a potentially relevant new usage of patronage in modern politics. As for the former, this paper sought to identify the key patterns that existing data highlights. Nevertheless, there is scope for further research, sustained by a strong empirical dimension.

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