



Seven imperatives for improving the measurement of party nationalization with Evidence from Chile[☆]

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ABSTRACT

Party nationalization measures are often used to describe and analyze the nature of political parties and party systems. However, the term “party nationalization” is imprecise, with little consensus on how to measure it or evaluate its implications. This article advances the literature on nationalization in a number of crucial ways. In it, we make seven concrete suggestions for improving the measurement of party nationalization in theoretical terms and then demonstrate the problems and biases with existing studies through a theoretical discussion and application to Chilean political parties. Given that our theoretical and empirical analyses show there are important weaknesses in all nationalization measures, we argue in favor of approaching the phenomenon with a variety of tools in order to avoid misleading conclusions.

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1. Introduction

At least since Schattschneider (1960) raised concerns about local politicking, party nationalization has been a focus of work in political science. Politicians and electoral reformers share these concerns, leading countries as diverse as Peru, Nigeria, and Indonesia to require parties to show broad national support to gain or retain registration. Likewise, Germany, New Zealand, Mexico, Venezuela and many others use two-level electoral systems to balance local and national aspects of representation. Despite its prominence, the term “party nationalization” remains

imprecise, with little consensus about how to measure it or evaluate its implications. Even in single country analyses, authors use different methodologies and reach different conclusions about party and party system nationalization. This inconsistency is evident from some conclusions drawn from studies of Chile.

Jones and Mainwaring's (2003) study of the Americas finds that the Chilean party system is “quite nationalized” and that the party coalitions had “consistently had very high [party nationalization scores]” between 1989 and 2001. Similarly, Harbers (2010) shows that the Chilean party system progressively nationalized between 1989 and 2005, and that it has the second-highest average party system score in the region. Nevertheless, these conclusions are not universally shared. Alemán and Kellam (2008) argue that national forces play only a “minor role” in electoral change in Chile from 1989 to 2001, and that the sub-national component of the vote is significantly higher than the national component. They also conclude that swing voters have not responded in a common way across the country, which is indicative of lower nationalization. Morgenstern et al. (2009) support this latter characterization of Chilean parties. They classify the left-wing *Concertación* coalition

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from 1989 to 1997 as “in flux,” meaning that the coalition’s vote share is homogeneously distributed across districts, yet shows high volatility from election to election. So, despite using roughly the same legislative electoral returns from 1989 onwards, these four studies reach three very different conclusions about the state of Chilean parties and the Chilean party system. How can this be?

A first reason is that authors differ in their definition of nationalization. Some focus on parties and others on party systems. Further, nationalization has at least two dimensions, one focusing on territorial homogeneity of party’s support and the other on the consistency in the change in the district-level vote over time. Second, indicators vary, even where the authors do agree on the definitions. A debate about weighting observations contributes to this problem. Third, authors use different units in their analyses.

In what follows we use a theoretical discussion and a case study of Chile to review these problems and suggest means for improving analyses. Our goal here is not to develop a new indicator of political party nationalization. Rather we evaluate all significant indicators and demonstrate the strengths, weaknesses of each. In the first half of the paper we make seven concrete recommendations about how to handle measurement issues. Our review does not uncover a “best” indicator, but we are able to underscore the minimal requirements for any analysis. Our case study of Chile, then, highlights these issues and substantiates the general arguments about conceptualization and measurement.

2. Defining party nationalization

Characteristics of parties define party systems, but the reverse is not necessarily true. For example, the Spanish party system is composed of some parties that have support throughout the country plus others that only compete in one region. In this paper, therefore, we focus on the party level, presuming that party system nationalization is a weighted combination of traits of component parties.

The concept of nationalization itself is composed of at least two dimensions, which Morgenstern et al. (2009) label static and dynamic.¹ Static nationalization—what others have called “party system linkage” (Cox, 1997, 1999) or “party aggregation” (Chhibber and Kollman 1998, 2004)—refers to the degree to which a party has a similar level of support throughout districts. It distinguishes between parties that campaign and win votes across the nation from those that concentrate their support regionally. Dynamic nationalization, on the other hand, implies the degree of homogeneity in the change of a party’s support in each district across two or more elections. If a party’s support in all districts moves together, then it is dynamically nationalized. But if the party moves up in some districts, while falling (or moving up at different rates) in others, then candidates or local issues must drive electoral decisions. When local-level politics are predominant,

parties must act strategically with candidate choice and targeted policies. These voting patterns also imply weaker party labels, at least relative to times or countries when/where there is more homogeneity in the changes in district-level voting patterns. When unmodified, the term “party nationalization” does not distinguish between these phenomena, though Morgenstern et al. (2009) show that the dimensions are relatively independent.

Therefore, our first imperative is:

- (1) Analyses of “nationalization” must distinguish between the static and dynamic dimensions. They should also take care to clarify the relationship between nationalization of parties and of the party system.

These dimensions have been explored by a succession of scholars (Caramani, 2004; Bochsler, 2010; Mustillo and Mustillo, 2012; Cartrite et al., 2013), who have developed myriad indicators for measuring them. Each implies tradeoffs in terms of statistical sophistication and ease of interpretation (see Table 1). The measures are partly distinguished by whether and how they try to capture the frequency of a party’s participation, the geographical distribution of a party’s support, and the consistency of change across elections in a party’s district-level support.² They also differ in how they utilize weights in capturing the effects. Bochsler (2010) provides a good review of the indicators and weighting as applied to the static dimension. In what follows, we give only a short review of static measures, focusing on problems of weighting, before moving on to similar concerns with dynamic indicators.

2.1. Static nationalization measurement

The most common type of party nationalization explored in the literature is “static”. To begin unraveling the differences among some of its indicators, Table 2 shows statistics for five parties across nine different families of indices in a hypothetical five-district country in two election years. The indicators yield widely differing views of the extent of static nationalization for these parties.

The most basic indicators, such as Rose and Urwin’s (1975) number of uncontested legislative seats or Caramani’s (2004) territorial coverage index, measure the percentage of sub-national units in which a party runs candidates. One version of this index created by Bochsler (2010) weighs uncontested districts by population while leaving contested districts unweighted. If parties do not compete in small districts their scores are not affected significantly, while if they fail to field candidates in large districts, their nationalization scores shrink significantly. Still, while these calculations capture the options parties present to voters, they do not differentiate cases where parties receive few votes from those where parties are competitive or dominant.

¹ Mustillo and Mustillo (2012) add that other potential dimensions may also exist.

² Another type, inflation, focuses on system-level characteristics, namely the difference in the number of parties at the district and national level, and is thus not included here. This is summarized in Kasuya and Moenius (2008) and elsewhere.

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