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Social Movements and Social Policy: the Bolivian Renta Dignidad

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Abstract The impact of popular mobilization and social movements against the advance of neoliberal policies has been well documented and theorized. Their concrete impact on the process of social policy reform in the post-neoliberal era is still under debate, however. This article theorizes about the conditions linking disparate new movements to each other and to old, class-based social movements in the defense of a concrete policy reform, Bolivia's non-contributory pension, the Renta Dignidad. Using a case study research design built on content analysis of newspaper coverage, we identify the necessary, though not sufficient, conditions facilitating alignment of interests and coordinated mobilization—a context of adversity (as confronting a highly mobilized opposition) and the universalistic characteristics of the policy. Under those conditions, social movements allied with Bolivia's governing Movement Towards Socialism (MAS) were critical in the passage of Renta Dignidad by counterbalancing the pressure from a highly mobilized opposition backed by strong economic elites.

Keywords Social policy · Social movements · Latin America · Bolivia

To what extent and under what conditions do "old" and "new" social movements shape social policy? This article explores this question by analyzing Bolivia's non-contributory universal pension, Renta Dignidad. Our goal is to contribute to the debate on the impact that social movements have on social policy.

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We begin by making a distinction between "old" and "new" social movements, even if there are significant overlaps between the two. Whereas the former are typically associated with organized labor and class-based mobilization, the latter are associated with a broader array of movements—including, among others, ecology, feminist, and indigenous movements—and with multiple forms of collective mobilization (Álvarez and Escobar 1992, p. 3). We also engage with a branch of the social movement literature that examines the impact of social movements on policy outcomes (see Amenta et al. 2010). These analyses point out that social movements pursue change by engaging in a wide array of activities that try to influence the policy-making process, such as engaging in protests (Meyer and Tarrow 1998), exerting diffuse pressures (Amenta et al. 1992), introducing issues on the government's agenda, or exerting veto powers (Jenkins and Klandermans 1995). This article aims to redress these perspectives, which we believe are insufficiently nuanced, and to provide new insights on the development of social policy by tracing the concrete agency of social movements. The implications are noteworthy; they can help us gain a better understanding of the impact of "old" and "new" social movements, and their relationship with left parties, on social policy.

The literature on the formation of social policy in advanced capitalist democracies emphasizes the impact of "old" social movements, particularly organized labor, as key groups generating pressure for the expansion of social policy, in collaboration with parties of the left or even Christian Democratic parties (Huber and Stephens 2001). In Latin America, the literature sees the formation of social policy either as a series of responses to the pressure exercised by organized groups (Mesa-Lago 1978; Niedzwiecki 2014) or as a process driven by powerful presidents (Kaufman and Nelson 2004). While the first approach overemphasizes the impact of "old" movements, leaving out non-traditional groups, the second stresses top-down processes as a central contributing factor explaining the evolution of social policy. In addition, previous works on pension reform focus on the determinants of state retrenchment. They tend to either downplay the impact of social movements (Madrid 2003) or incorporate their role indirectly by analyzing partisanship (Brooks 2009).

Building on recent literature that analyzes social policy expansion in Latin America (Huber and Stephens 2012; Pribble 2013), we construct a set of theoretical expectations and explore their capacity for explaining the role of social movements in the development of social protection in contemporary Bolivia. We argue that old and new social movements have played a decisive role in achieving the universal pension scheme by exercising direct agency. We further argue that what mattered were their high levels of coordination and mobilization, which enabled them to play a direct role in helping the Movement Towards Socialism (MAS) pass legislation. While our analysis privileges agency over structural determinants, it also confirms the importance of left parties as crucial allies of social movements in explaining social policy reform (Esping-Andersen 1990; Huber and Stephens 2001; Huber and Niedzwiecki 2015).

We explore these issues through the analysis of Renta Dignidad. This is a non-contributory universal pension scheme paid to all citizens over the age of 60. It is particularly significant given that, prior to this policy, Bolivia had among the lowest levels of pension coverage in the region. As a result, Renta Dignidad has gained the status of an acquired social right and has proven highly successful in the benefits it has brought to low-income families, as well as in explaining the electoral success of the MAS (Crabtree 2011, pp. 137–8).

Bolivia is a substantively important case (Goertz and Mahoney 2012) because it is a country governed by a "movement-based party" (Anria 2015). The literature on the Latin American "left turns" tends to group together Bolivia, Venezuela, and Ecuador in the "contestatory" strand of the left (Weyland et al. 2010). In a more precise classification of left governments, Levitsky and Roberts (2011) classify the MAS as an example of the "movement left," a new organization whose internal structures disperse power among grassroots actors and is held accountable by those. In such a context, it is reasonable to expect a stronger impact of social movements than in countries with more strongly consolidated parties, such as in Chile and Uruguay, where parties tend to play the leading role counting on support from social movements. Therefore, the scope conditions of this article are restricted to left parties that (a) have strong ties to social movements and that (b) operate in weakly institutionalized contexts.

Although Bolivia may represent a best case scenario for our question, in so far as one would be most likely to find influence from social movements in a country governed by a movement-based party, our question is not limited to influence or no influence but extends to the conditions under which influence is effective and the manner in which influence is exerted. Thus, three theoretical questions remain to be answered: (1) Did the positions of different kinds of social movements coincide or were there conflicts and problems of coordination? (2) What conditions facilitated alignment and sustained coordination? (3) Was social movement influence diffuse or was it specific and extending to passage and implementation of the legislation? The fact that movements aligned with the MAS have also proven to be successful in forcing the Morales government to reverse specific policies that affected them, demonstrates that, even in a best-case scenario, answers to the question about the impact of social movements on policies are not obvious (on this point, see the "Conclusion" and Anria 2015).

In short, we argue that the contextual conditions and the characteristics of the policy facilitated alignment. First, the policy was introduced in a context of strong polarization in the presence of a mobilized opposition. Second, the policy was universalistic and non-contributory, which meant that more members of popular social movements would benefit from it than be harmed by it.

To examine the factors shaping the influence of social movements on Renta Dignidad, we rely on content analysis of newspaper coverage. Our analysis traces a very specific agency, policy-oriented and not diffuse, of vibrant social movements in Bolivia. Specifically, we find that new social movements belonging to "popular sectors" (including neighborhood associations, landless movements, indigenous movements, and other organized social movements) were decisive actors in the enactment of Renta Dignidad. We also find that the policy process was contentious and characterized by interorganizational conflict among "old" and "new" social movements, which initially reacted differently to the enactment of Renta Dignidad. The Bolivian Workers' Central (COB), for instance, initially opposed the policy on the grounds that it was unfair to those who had contributed to the pension system. Other traditional organizations representing formal workers, such as factory workers, teachers, and journalists, did support the proposal from the beginning. Conditions of adversity and the universal features of Renta Dignidad linked disparate new movements to each other and to old movements, and by staging mobilizations, they played a direct role in its passing.

Policy-oriented agency was successful during the design of Renta Dignidad; the pressure exercised by neighborhood associations—organized through Bolivia's

Municipal Federation Association (FAM)—forced the government to take into account their demands. This resulted in an initial monetary compensation to municipal governments, one that was otherwise not on the agenda. Second, policy-oriented agency also manifested itself during the process of legislative approval, when parties with strong ties to economic elites in the eastern departments of the wealthy *Media Luna* region (and in opposition to the government) had a majority in the Senate. Social movements allied with the MAS initiated large-scale, sustained mobilizations to demonstrate their support of the bill to representatives, which ultimately assured that the law would pass by not letting opposition senators enter Congress, that is, by using democratically dubious tactics to marginalize opposition forces and weaken their capacity to resist reforms. Finally, after Congress passed the Renta Dignidad bill, social movements allied with the MAS mounted large-scale protests to counterbalance the mobilization of elites (and their allied opposition movements) in order to ensure the implementation of the policy.

Overall, our case informs a new understanding of the necessary (though not sufficient) conditions under which social movements have greater chances to have an impact: when new and old social movements are highly mobilized and have strong linkages to parties, and when their interests align.

Social Movements, Movement-Based Parties, and Outcomes

We define social movements as "actors and organizations seeking to alter power deficits and to effect social transformations through the state by mobilizing regular citizens for sustained political action" (Amenta et al. 2010, p. 288). Social movements are often seen as regime "challengers" or as groups that seek to change some aspect of the social and political structure by confronting systems of authority, as the state. A political party, in turn, is "any group that presents at elections, and is capable of placing through elections, candidates to higher office" (Sartori 1976, p. 64). A party's *raison d'être* is to gain and maintain office and promote the interests of its members, as well as to represent the interests of its supporters.

Specifically, this study deals with social movements and parties formed by social movements. Usually described as "movement-based parties" (Anria 2015), those parties draw their organizational strength from connections to popular-sector movements and organizations (labor unions, indigenous movements, landless peasants, neighborhood associations, pensioners, and street vendors, among others). They are broad alliances of various social movements and, as such, they are well prepared to incorporate a diverse set of issues, social actors, and demands. Movement-based parties are hybrid: their constitutive movements engage in antigovernment mobilization (as in mass demonstrations and protests), and at the same time, they run candidates that compete for office. While they vary in terms of ideology, in this paper, we focus on movement-based parties of the left or those committed to the values of equality and solidarity. Examples include the Brazilian Workers' Party, the Uruguayan Broad Front, and the Bolivian MAS, among others.

The movements comprising movement-based parties are different in aims and outcomes. Introducing the distinction between "old" and "new" social movements helps us emphasize this diversity, even if we admit that the boundaries between the two are not always clear-cut. Whereas "old" movements are associated with organized

labor and are inclined towards material concerns, "new" movements—such as those mobilized around issues like identity, gender, ethnicity, indigenous rights, the environment, human rights, and so on—are often associated with post-material issues and are, in principle, less inclined towards material interests and demands (Foweraker 1995, p. 42). Yet, in today's movements, "old" and "new" features overlap significantly.[1]

We pay attention to the "organizational field" in which these movements are embedded (Diani 2012), which enables us to stress problems of interorganizational coordination. Movements organized by and for a specific constituency for the defense of a particularistic benefit may not be willing to engage in wide interorganizational collaboration. Because our focus is on the influence of social movements on social policies, we concentrate on movements that directly or indirectly make claims on the state. Our definition excludes advocacy organizations, NGOs, and networks of professionals that, although they place demands on the state, are generally more focused on changes internal to a group than on broad policies. It also excludes groups seeking state intervention to impose their vision of morality, such as the anti-gay rights or pro-life movements.

Social movement scholars agree that social movements have *some* impact on policy-making (Gamson 1990). They also agree that their political consequences have not been studied enough (Andrews 2001). Over the past decade, however, there has been a wave of research on the impact of social movements on policy-relevant outcomes (Amenta et al. 2010). This scholarship has examined the influence of movements over public policies that provide collective benefits to movements' constituencies, but it focuses mostly on industrialized countries (Tarrow 1998; Andrews 2001; Ganz 2009).

Theoretical reflection on Latin American social movements increased since the 1980s. In the context of market and political liberalization, new social movements blossomed while class-based movements experienced a dramatic weakening (Roberts 2002). For the most part, studies moved away from the effects of movements on redistributive outcomes; they focused instead on the role of social movements in developing new identities, their multiple strategies and tactics to shape cultural politics, and their contributions to redefining the meaning of citizenship (Oxhorn 2001, p. 180). While this research drew attention to the existence of a wider array of movements beyond the traditional class-based ones and celebrated their transformational potential and "newness," other studies highlighted the high degree of fragmentation among them. As some scholars noted, fragmentation occurred because new social movements mobilized around self-contained issues, which discouraged broad-based collaboration, and because they tended to favor non-hierarchical modes of internal organization (Escobar and Alvarez 1992).

As the advance of market reforms led to lower standards of living and aggravated social inequalities, scholars underscored the fragmentation of the organizational field in Latin America. The "atomization" literature, as it came to be known, stressed the difficulties for old and new movements to coordinate mass mobilizations and challenge anti-popular reforms (Roberts 1998; Kurtz 2004). It emphasized the weakening effects of market-oriented reforms on popular collective actors, in particular unions, noting a

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[1] New movements also make material demands. Old movements, in turn, cannot be reduced to solely material dimensions; for example, they combine class struggles with cross-class aspects of identity. See Eckstein and Wickham-Crowley (2002).

decline in their organizational and mobilizational capacity. This weakness, as the literature claimed, impeded organized labor from acting alone or even forming alliances with other social actors to mount large-scale mobilizations against economic liberalization. A sharp decline in antigovernment union mobilization in the 1980s and 1990s provided support for that thesis.

However, the empirical basis of the atomization literature has been disputed. Arce and Bellinger (2007) note that, in the presence of democracy, market reforms in fact led to *increased* mobilization against those reforms. Focusing on the lack of large-scale union mobilization, they suggest, blinded advocates of the atomization literature to see meaningful patterns of collective political activity on self-contained issues, like the environment, mining, land distribution, gender, racial justice, indigenous politics, and subsistence rights (like urban neighborhood associations), as prominent examples.[2]

By the end of the twentieth century, moreover, social protest against market reforms arose in Latin America (Roberts 2008). Turning the atomization literature on its head, Silva (2009) theorizes about the conditions that connected disparate social movements to each other against neoliberal policies, shaping their ability to challenge neoliberalism. In several cases, episodes of antineoliberal contention were consequential enough to bring down incumbent presidents who supported neoliberalism, and they contributed to the election of forces more interested in social equity. While those challenges had a common origin in the grievances generated by neoliberal policies (including economic, social, and political exclusion), the presence of economic crises and the application of brokerage and framing mechanisms played a central role in solving coordination problems among previously unlinked movements and in forming ties between popular movements, left-wing parties, and middle-class groups, which boosted their collective power (Silva 2009, p. 38).

While this research has advanced our knowledge on the conditions linking diverse social movements to each other in episodes of contentious activity reacting to the advance of neoliberal reforms, we know little about the impact of movements on the politics of redistribution in the post-neoliberal period. The election of left presidents after 1998 resulted, first, in efforts to understand the origins of the left turn and to classify different types of left parties and movements (Cameron and Hershberg 2010; Levitsky and Roberts 2011; Weyland et al. 2010). It resulted, second, in studies about the role of democratic longevity and left parties on social policy expansion (Huber and Stephens 2012; Haggard and Kaufman 2008). Yet, for all the attention placed on the development of typologies and the application of redistributive social policies by left-wing parties, we still lack a clear understanding of the implications different lefts may have on the types of policies they adopt once in power, as well as subnational variation on how those policies are implemented.[3] Pribble (2013) is an exception; she argues that different types of party-society linkages have important effects on the kinds of social policies each party may be able to advance. Left parties that have stronger linkages to popular-sector movements are more likely to push social policy in a more redistributive

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[2] Neoliberal reforms, moreover, were resisted by popular sector movements, such as indigenous movements in Bolivia, landless rural workers in Brazil, rural social movements in Costa Rica and Peru, the unemployed in Argentina, and women's organizations (as the Mothers of the Plaza de Mayo in Argentina and the Bartolina Sisa women farmers' organization in Bolivia), among many others (Ondetti 2008; Edelman 1999; Arce 2008; Garay 2010; Silva 2009).

[3] See Niedzwiecki (2015) for an exception.

and universalistic direction. While this analysis gives us some theoretical purchase in explaining social policy outcomes, it remains too centered on one side of the equation—party organizational characteristics—and only considers social movements and the impact of their mobilization indirectly.

The resulting gap in contemporary scholarship has serious theoretical costs. It means we lack an understanding of the influence social movements have on redistributive outcomes. Given that social movements struggle for these outcomes (Garay 2010; Fairfield 2015), and given that studies of industrialized countries have established that popular mobilization does indeed have a crucial impact on welfare state development (Esping-Andersen 1990; Huber and Stephens 2001), ignoring the influence of social movements in analyses of redistributive policies in Latin America is at best problematic. [4] We hope this study will help improve our understanding of the relationship between movements, left-wing parties, and social policies.

Making causal claims about the influence of movements on social policy is not easy, but the risks of ignoring it outweigh the difficulties. One of the best ways to proceed is by analyzing political processes in the development of legislation. To make convincing claims of their influence, we need to "demonstrate that the challenger changed the plans and agendas of political leaders; the content of the proposals devised by executives, legislators, or administrators; the votes of representatives key to the passage of legislation; or the speed or nature of implementation" (Amenta et al. 2010, p. 301).

Study Design: Content Analysis

Renta Dignidad is an important case for examining the impact of social movements on social policies for two reasons. First, it is a universal non-contributory pension that has been regarded as the highest progress towards a rights-based strategy among Latin American old-age protection systems (Arza 2012). Its universalistic nature means it has the potential to generate greater popular support than social policies that benefit a smaller segment of the population. Therefore, the analysis of coordinated pressure from a variety of social movements becomes highly relevant. Second, it was enacted by the MAS, which is a new party and an example of one that gives greater weight to social movements. We should therefore expect a strong influence of social movements helping the MAS pass this legislation.

Our research design allows us to identify the impact of social movements on policy dynamics in different stages, from the design of the policy, to the approval in the legislature, and to its initial implementation. The conflict surrounding the enactment of Renta Dignidad was about the sources of financing rather than the design of the benefits. The commitment to enact universalistic social policies is in good part a commitment to guarantee that such policies will be sustainably funded (Pribble 2013). Therefore, the contention over the sources of financing shows the conflict over universalistic policies. The sustained mobilization of social movements allied with the MAS was politically consequential, particularly for making the financing of Renta Dignidad possible.

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[4] Tenorio (2014) and Niedzwiecki (2015) are partial exceptions by analyzing the effect of organized labor on aggregate social spending in Latin America.

Our research design includes a systematic case study showing the relationship between popular mobilization, the MAS as a governing party, and social policy reforms. Recent research by the authors shows that the strength of labor unions in South America matters for social policy expansion, measured through social spending (Niedzwiecki 2015; also Tenorio 2014). Here, we are interested in understanding the mechanisms by which disparate groups—including multiple "new" movements and not just labor unions—shape the process of social policy reform. In particular, we explore the role of their mobilization for the development of an important program that cannot be fully captured through social spending measures.

To trace mechanisms, we rely on data from newspaper accounts, secondary sources, and interview material collected in Bolivia in 2008 (right in the aftermath of the passing of Renta Dignidad) and also between 2012 and 2013 (when the program was already consolidated). In particular, we use content analysis of the three major newspapers in Bolivia, which show the instances of support and opposition displayed by the different actors involved. We coded all the news articles from Bolivia's most influential daily-edition newspapers—*La Razón*, *El Deber*, and *Los Tiempos*—containing the words "Renta Dignidad." These three newspapers are based in La Paz, Santa Cruz, and Cochabamba, respectively—an area that constitutes Bolivia's "central axis." By including the newspapers with broader scope, coverage, and reach, we compensate for over-reporting support for the government or opposition to the government.[5] In these three newspapers, we focus on the period from September 28, 2007 to February 28, 2008—in short, we cover a period of 2 months before and 3 months after the law was enacted.

Throughout this period, we count events of mobilizations in support for or opposition to Renta Dignidad. In a context of high polarization such as in Bolivia in that period, the positions of support or opposition were clear-cut, and there was little ambivalence. In addition, we also consider mobilizations in support for or opposition to other government policies in addition to the outcome of interest. For instance, social movements organized public demonstrations in support of both Renta Dignidad and the Constituent Assembly. For these events, we include an additional category that contemplates this overlap.

Our unit of observation is each day in which one or more social movements, either supporting or opposing the reform, resort to a strike, protest, or other strategy as its means of expression in a given geographical space. This means that if a given mobilization takes place over 8 days, then than protest is counted as "eight." And if many organizations participate at the same place in that particular mobilization, then it is still counted as eight. In addition, if two protests in different departments take place in a given day, those events will be counted as "two." Our aim with this strategy is to measure the strength of the mobilization. Our assumption is that the longer the mobilization and the more geographically spread-out, the more pressure it exercises. Nevertheless, if organized movements from a given department join an ongoing mobilization, that event is not coded. That is, we only count it as "one" for that particular day.[6] In the Appendix, we present examples of mobilizations in support or

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[5] We would expect *El Deber* to under-report pro-government mobilizations. That newspaper is known for its strong connections to economic elites and business interests in the Santa Cruz region, its alignment with regionalist parties and autonomy movements, and its antagonistic position against the central government.

[6] We do not include the number of participants in each mobilization because this information is not systematic across the newspapers. However, we do include the number of people who participated in the event in the text if that information is available.

opposition (Table 1, online Appendix) and a full counting of such mobilizations, discriminating months and participating organizations (Table 2, online Appendix). Table 3 in the online Appendix presents a list of acronyms.

Empirical Setting

Movement-Party Relations and the National Context of Renta Dignidad

Morales and the MAS gained power in December 2005 by articulating the demands of groups and individuals who had become disenchanted with neoliberalism and the established political class (Silva 2009, p. 143). These became a broad-based, powerful, yet loosely organized, coalition of popular-sector movements. Coalition building occurred amidst an intense cycle of antineoliberal contention. This reached a peak in October 2003, with the Gas War that forced President Sánchez de Lozada to resign, and it reached another peak in May–June 2005, leading to the resignation of President Carlos Mesa and the call for anticipated elections. After the revolts of October 2003, the MAS came out as the only political force able to turn popular discontent into a coherent and electorally viable political project (Silva 2009, p. 143).

The MAS experienced internal alterations when it transitioned from a regime challenger into government (Anria 2015). This involved alliance building with a wide array of movements that were not core movements of the MAS. Alliance building, in turn, involved the negotiation of spaces of power for those organizations, as many exchanged loyalty for positions in government (Zuazo 2008, p. 43). Internal strain followed: members of the core perceived that a clique of new members had taken prominent roles within the MAS. Looking at the composition of Morales' first cabinet of ministers, one can see that, with some exceptions, he staffed key positions in the executive branch with individuals external to the core movements. Out of 16 ministries, for example, none of them was occupied by core organizations (Zuazo 2008, p. 44). Table 4 in the online appendix shows the social sectors in Morales' first cabinet of ministers.

Most importantly, the process of alliance building created tensions among movements with disparate redistributive preferences, making the party very susceptible to internal conflict. For example, since the MAS accessed office, allied movements with conflicting views over land redistribution ("indigenous" vs. "peasant" movements) have fought among each other to shape agrarian policies, and allied movements with competing views on mining activity ("unionized" vs. "cooperativist" mineworkers) have fought to shape mining policies. The support from many new allies is usually contingent on the MAS's capacity to deliver policies that are aligned with their particularistic interests, making the harmonization among competing interests increasingly difficult to sustain (Anria 2015).

As a result, according to influential actors within the government, the MAS can be best described as a "flexible and negotiated coalition of grassroots actors and movements" (interview with García Linera 2013). The coalition might expand and contract as a function of different institutional conditions, what Max Weber would call "constellations" of power, and in response to the policies adopted. During Morales' first term in office, for example, the MAS did not control Congress and had a strong and highly mobilized opposition entrenched in the *Media Luna* departments. High levels of polarization and stalemate marked the period. These adverse conditions fostered unity

among allied movements with distinct redistributive preferences. In such a context, movements allied with the MAS played a direct policy-making role; through sustained mobilizations they brought new issues on the agenda—the most notable of which was the proposal for constitutional reform—and they helped pass highly contested policies (as nationalizations, agrarian reform, etc.) by providing unconditional support.

This context of adversity requires some elaboration. Reflecting regional cleavages, the MAS' redistributive ambitions ignited opposition from elites in the affluent eastern departments dubbed the *Media Luna*, as they saw their economic interests being threatened by the central government, its redistributive policies, and the new constitution. Because these departments have the largest gas reserves and the most fertile lands in the country, local business and landholding elites reacted against Morales; they articulated a powerful right-wing counter-movement that opposed the constitution and demanded greater regional autonomy and control over revenues (Eaton 2007). Polarization and stalemate defined Bolivian politics during Morales' first term in office.

In short, the MAS' adversity (due to a weak position in Congress, where the right-wing coalition PODEMOS had a majority) and the presence of a mobilized opposition backed by economic elites served as glue linking together disparate movements and interests. In alliance with the MAS, they mobilized for the passing of contested policies, like Renta Dignidad.

While allied movements have at times provided mobilizational power to the MAS, their impact on policy-making is not always straightforward. During its first term in office, core movements allied with the MAS supported the government in controversial policy issues; as some scholars have argued, the MAS even used its core movements as shock troops in violent mobilizations against political adversaries (Madrid 2011, p. 252). In other cases, however, movements allied with the MAS mobilized *against* the government and placed real limits on Morales' authority (Anria 2013, p. 37; 2010, p. 113). In October 2006, for example, unionized mineworkers affiliated with the Central Union of Bolivian Workers (a traditional "old" movement) and cooperativist mineworkers (a movement that combines "old" and "new" characteristics) clashed in Huanuni over the control of mining activities. On this occasion, as in many others, the presence of allied groups in the cabinet did not impede them from spurring on social conflict (Zegada et al. 2008, pp. 142–154). Although that strike was crushed by the government and did not force a policy change, it demonstrated that, even in a context that encouraged unity, Morales could not fully control his allied movements from above and that these were by no means docile allies. Renta Dignidad, the focus of our study, was enacted in this context of high polarization, legislative blockades by the opposition, and, also, tense relations between the MAS and its allied social movements.

The Contentious Road to Renta Dignidad

Bolivia's pension scheme had moved from a pay-as-you-go—defined benefit and publicly managed system—into a privately managed system with individual capitalization accounts in 1997. Since 1997, the system included two tiers that followed the Chilean prototype (von Gersdorff 1997). The second tier included a contributory, privately managed benefit based on individual savings, and the first tier consisted of Bonosol, or Bono Solidario, which was a non-contributory pension scheme for all Bolivians above 65 years old and covered around US$248 per year. It was funded by

the dividends of state-owned shares of privatized enterprises and administered by private pension funds (AFPs). Nevertheless, the benefit was only implemented for a particular cohort, with the idea that it would be abolished once the last beneficiary died. After the defeat of the incumbent Sánchez de Lozada, Bonosol was only implemented from 1997 to 1998 and from 2002 to 2007. In addition, the program was in constant risk of being halted due to its financial dependence on the privatized enterprises and the failure to be funded through other tax revenue (Muller 2009, pp. 166–167).

The creation of the Renta Dignidad represents a significant improvement in terms of social rights and stable sources of funding. As Arza (2012, p. 8) describes it, Renta Dignidad is "the only nation-wide universal non-contributory pension in Latin America providing benefits to all as a matter of right, with no behavioral or contributory conditions, no recourse to a means-test, gender-neutral and independent from family structure." Compared to Bonosol, Renta Dignidad is conceived of as a right to all cohorts, with no termination date. It is a right of all elderly Bolivian citizens. In addition, Renta Dignidad increases the Bonosol amount by 25 %, providing US$314 per year, independently of previous contributions. The program also offers reduced benefits; those who receive a long-term pension from the contributory pension system (known as *rentistas*) will only receive 75 % of the regular benefit (Muller 2009, p. 167). Finally, it is linked to redistributing the gains from extractive industries, through a tax on gas. It involves a redirection of revenues coming from the hydrocarbon sector through the Direct Tax on Hydrocarbons (IDH). The policy is funded by 30 % of all resources received from IDH by departmental governments, municipalities, the indigenous fund, and the national treasury. It is also funded with the profits from the privatized firms that are deposited in the Collective Capitalization Fund.

Amending the source of funding for the Renta Dignidad was a contentious process, and it ignited opposition from groups in the *Media Luna*. Prefects from these Departments and their allied movements staged mass mobilizations against this program. Despite this pressure from the opposition, the Senate passed the law and created this pension scheme. The mobilization of movements allied with the MAS—including the elderly, coca-growing farmers, peasant movements, indigenous peoples' movements, street traders, cooperativist miners, and neighborhood associations, among others—played a crucial and direct role in the passage of the legislation by counterbalancing the pressure from the opposition.[7]

In the following pages, we present the positions, strategies, and relative success of the social movements that promoted or opposed Renta Dignidad, from September 2007 to February 2008. The first stage was from September to October 2007, when Morales announced Renta Dignidad. It was characterized by low-tenor confrontations. The second stage, when Renta Dignidad was debated in Congress, took place in November 2007. During that time, social movements changed their strategies and took to the streets; the level of confrontation increased on both sides. The third stage, after the Senate passed the policy, is the period of initial implementation, between December 2007 and February 2008. It was

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[7] Our focus is neither on the process through which the issue enters the legislative agenda nor on the position of individual legislators. We focus on the dynamics of social mobilization in the streets, which affected the design, passing, and implementation of the policy.

characterized by mobilizations from elites in the *Media Luna* region and their supporting movements and reaction from movements allied with the MAS.

Figure 1 presents a summary of all mobilization events throughout the analyzed period. It captures some of the polarization that characterized Morales' first term in office, particularly around Renta Dignidad. Social movements allied with the MAS appeared to have greater mobilization capacity relative to the mobilization of the opposition and its allied movements, a trend that is evident when we look at the news coverage of *La Razón*. The same pattern holds when we look at *Los Tiempos*, although the results are less robust. It is noteworthy that opposition mobilization is marginally higher than support mobilization if we look at the news coverage of *El Deber*. This is consistent with our expectation given that this newspaper, at that time, tended to underreport pro-government mobilizations due to its traditional alignment with elite interests in the *Media Luna* region, an alignment that was accentuated during Morales' first term in office.

Besides this quantitative evidence, in terms of the number of mobilizations, and as we elaborate below, the pro-MAS mobilizations were stronger and more effective to coordinate and sustain pressure in the streets. This is because those movements were generally larger in number of members and could therefore mobilize more strongly. Although we cannot measure this systematically across the newspapers and the event in question, we do include this information when it is available. While "thousands" or "a multitude" of people mobilized to support Renta Dignidad at key moments, sometimes a handful of people belonging to universities or representing municipalities, mostly concentrated in the *Media Luna* region, pressured against this policy. Other groups who had contributed to the pension system also mobilized in opposition to the policy. While some, like university students, got concessions, they were ultimately unable to coordinate sustained pressure. We found that large, consistent, and geographically dispersed mobilization in support for Renta Dignidad was crucial for counterbalancing the pressure from the (also mobilized) opposition and, thus, for helping the MAS pass Renta Dignidad.

The first round of opposition was from those "old" movements that had been contributing to the pension system and considered it unfair that those who had never contributed would receive a similar income upon retirement. Workers represented by Bolivia's main labor union federation—the Bolivian Workers' Central (COB)—were among the most vociferous opponents. Teachers and unionized mineworkers affiliated
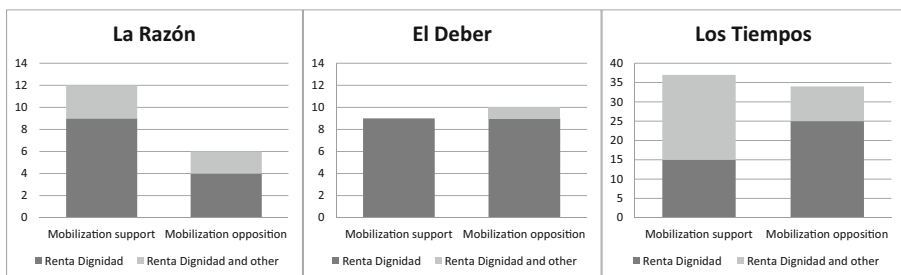

Fig. 1 Number of mobilization events (in days) in support and opposition to Renta Dignidad (September 2007–February 2008). *Source*: Author's coding based on *La Razón*, *El Deber*, and *Los Tiempos* newspapers. Note: The scale of Los Tiempos newspaper is larger than La Razón and El Deber because this newspaper is more thorough; it reports more mobilizations than the other two

with the COB deemed the benefit a charity. Along similar lines, other organized formal workers associations (such as the Asociación de Jubilados Fabriles de Cochabamba and the Confederación de Jubilados Rentistas de Bolivia) were skeptical of Renta Dignidad, fearing it might mean a decrease in the Bonosol transfer. In addition, a small amount of retirees, who received pensions for the contributory system, mobilized in La Paz in September 28 but were dispersed by the police. However, given the high levels of informality in Bolivia, the majority of the pension-age population does not have enough contributions, and therefore, the Association of the Elderly (Federación de las Personas de la Tercera Edad), which represents *no rentistas*, supported Renta Dignidad from the very beginning. It did so through mobilizations that reached a peak of almost 100 people (El Deber, October 26, 2007).

The main challenge, however, was directed at the funding sources of the policy: the decision to fund the policy through the hydrocarbons tax. As a result, departmental governments, municipalities, and public universities would see their transfers from that tax diminished. Although their mobilization coincided in interests, time, and place, these groups did not organize a coordinated response. University students in La Paz, Sucre, and Santa Cruz were among the first to mobilize against budget cuts. These mobilizations included a hunger strike in Santa Cruz. They varied in magnitude, with some including only 16 participants and others including "thousands" of people. They also varied in the level of violence against the police and each other. The strong mobilization from university workers achieved its aim: universities were no longer obliged to give up 3 % of the IDH transfer.

The municipalities, for their part, demanded compensations through their umbrella organization, the Federation of Municipal Associations (FAM). Bilateral negotiations between the FAM and Evo Morales took place early on in the process, and the FAM agreed to not mobilize during the time that these negotiations were taking place. The FAM succeeded in their demand: in exchange for their support, the national government increased the level of transfers from IDH by taking an additional amount from the departments, thereby compensating for the contribution of municipalities. In this way, the municipal resources were not cut. After this agreement was reached, the association of municipalities moved towards full support to the policy.

Nevertheless, the municipalities in the wealthier departments of the *Media Luna* did not consent to signing the agreement between the FAM and the government. These departments presented the strongest and most articulated opposition to Renta Dignidad. Their main demand was to not use the resources from the IDH to fund the policy, as it affected their interests. The stakes were high: 30 % of the hydrocarbon transfers to the departments were to be diverged to Renta Dignidad. Mobilizations against this policy started around 4 weeks before the final passing of the bill. In the Department of Tarija, for example, fasting retired women (*ayunadoras*) mobilized in opposition to the reform. These mobilizations were orchestrated from the top. Specifically, they were organized by the National Democratic Counsel (CONALDE), which was an elite association spearheaded by the prefects of the *Media Luna* and the civic committees that represented eastern businesses. Other groups that joined the mobilizations included "damas cívicas," university students, landowners, business people, and exporters.

Also in Tarija, supporters of the departmental government organized a vigil the same day that peasants allied with the MAS mobilized in support of Renta Dignidad. Fearing a violent encounter between these two groups, Evo Morales decided not to participate

in this mobilization. In the end, there was no violence but numerous threats on both sides escalating the conflict. However, the President did participate in the so-called "Abuela de las marchas" ("The grandmother of all marches," due to its size), which was organized by pensioners and other popular movements based in Santa Cruz. In the context of this mobilization, which gathered "thousands" of leaders and members of allied movements, Morales announced his will to pass Renta Dignidad, by decree if necessary.

After the Renta Dignidad bill passed in the lower chamber (in November 9, with two thirds of the votes and high levels of absenteeism from the opposition), the mobilizations for and against Renta Dignidad were reaching a peak. The government threatened to pass the reform by decree and opposition leaders responded with ultimatums. In this polarized context, the opposition-controlled Senate passed a revised bill in November 23. The revised bill proposed five alternative sources of funding for Renta Dignidad. In this way, the transfers from the hydrocarbon taxes that came from the departmental governments would remain untouched. Media outlets interpreted this bill as response to mobilizations both against the funding of the policy through the IDH and in support of the policy and the MAS government. Neither the MAS nor its allied social movements shared this interpretation; they argued that the proposed funding sources were not stable in the long term. As a result, social movements allied with the MAS reacted against this bill, giving their full support to the original bill by which the policy would be funded by the IDH. Their support for Renta Dignidad counterbalanced the pressure from the opposition in the *Media Luna* departments and, ultimately, was crucial for the passing of the bill on November 28. Social mobilization by movements allied with the MAS also ensured the survival of an important presidential decree (Decree 29,322 of October 24, 2007), which decreased the percentage of national transfers to departments coming from the IDH.

Demonstrations of strong support started 8 days before the bill was passed. Mobilizations—both of support and opposition—were geographically concentrated in La Paz, which hosts the seat of government. *Los Tiempos*, a Cochabamba-based newspaper, estimated 20,000 coca growers mobilizing only from the highland valleys of the Yungas (Los Tiempos, November 22, 2007). Large-scale mobilizations were also prominent in Sucre, Bolivia's official capital city and host of the Constituent Assembly, as well as in Santa Cruz. Their mechanisms included mobilization to major cities along with road blockades to isolate these cities; in La Paz, the ultimate goal of mobilized groups was to reach the building of the Senate and put pressure on legislators. The main movements that mobilized support for the MAS during these 8 days in La Paz and El Alto included local popular organizations with great mobilizational power—COR-El Alto, FEJUVE-El Alto, and the Federation of Gremialistas—as well as rural producers affiliated with the CSCB (then known as the "colonizers"), coca producers of the highland valleys of the Yungas and of the Chapare region and other CSUTCB-affiliated peasant unions. In Sucre, similar movements, as well as those representing landless rural workers, neighborhood associations, and peasant women, organized a public demonstration of more than 400 people in support for Renta Dignidad. In Santa Cruz, the bastion of the conservative opposition, coca growers were the main mobilizers in support of Renta Dignidad.

Mass mobilizations in support of Renta Dignidad also moved from other departments to La Paz. The main one started in Caracollo (near Oruro) with 2,000 participants

and made it all the way (almost 130 miles) to La Paz with 4,000 people. This mobilization lasted more than a week; among others, it included the CSUTCB, the CSCB, indigenous peoples' movements in the highlands (CONAMAQ) and in the lowlands (CIDOB), CSUTCB-affiliated coca producers from the Yungas and from the Chapare region of Cochabamba, and the elderly (the Association of Workers without Pension). Once the mobilization arrived in La Paz, it incorporated allied local movements, including neighborhood organizations from El Alto, cooperativist and unionized mineworkers, the National Confederation of Retired People (Confederación Nacional de Jubilados y Rentistas de Bolivia), and "informal" workers affiliated with the COR-El Alto. Evo Morales was the main speaker of the mobilization when it reached La Paz.

On the day the bill was voted on, those allied movements made a cerco, or human fence, around the national congress. Participants of the mobilization surrounded the Senate preventing the entrance of members of the opposition. In the words of PODEMOS Senator Tito Hoz de Vila, "[the movements allied with the MAS] told us that if we decided to enter the building, it was to vote in favor of the law [Renta Dignidad], but if we did not vote in favor, they would not let us out. Even the policeman in charge of security told us he did not recommend that we enter, because they had let the peasants into Congress from the back door and the main entrance" (*La Razón*, November 28, 2007). In this way, the law that approved Renta Dignidad was passed in the absence of the opposing majority and while social movements were keeping guard outside.

Renta Dignidad was finally enacted by Morales in November 28, 2007. He announced this policy surrounded by "a multitude" that included peasants and indigenous peoples, the elderly, and citizens from La Paz (*La Razón*, November 29, 2007). In his public speech, Morales expressed his aspiration to constitution-alize both Renta Dignidad and Conditional Cash Transfer Bono Juancito Pinto, and he thanked the movements for their active role in the struggle for these policies.

After the law was passed, CONALDE—which was an association formed by opposition departmental prefects and civic committees representing Bolivia's eastern businesses—initiated a series of strikes that encountered open opposition of groups that support the MAS. In their first protests after the passing of Renta Dignidad, CONALDE organized road blockades that shut down access to La Paz. In addition, the Women's Civic Committee in Santa Cruz, receiving the support of 300 people, also declared a hunger strike. These counter-mobilizations lasted 5 days. Opposition movements in Chuquisaca, Cochabamba, Oruro, Potosí, and Santa Cruz followed the same strategy. Reacting against these mobilizations and the risk of losing the transfer, social movements allied with the MAS organized protests in some of these localities—including La Paz, El Alto, Cochabamba, and Santa Cruz. After those mobilizations were suspended, negotiations were carried out at the elite level, between the national government and the dissident prefects. During these negotiations, sporadic mobilizations of support took place in La Paz, including the presence of "hundreds" of elderly people (El Deber, January 10, 2008). The basic contours of the policy remained unchanged, however. The first payment of the Renta Dignidad took place on February 1, 2008 and has been uninterrupted ever since.

At the time of this writing, in August 2015, Renta Dignidad constitutes Bolivia's largest cash transfer in terms of GDP, and it guarantees basic social

protection to almost one million retired people—most of whom lacked any prior protection through social security. It is a significant advance in terms of social rights in the present—and one that might leave favorable policy legacies in the long run (Huber and Stephens 2012, p. 265).

Conclusion

By looking at the passing of Bolivia's Renta Dignidad, our analysis has yielded a new understanding of the necessary (though not sufficient) conditions under which old and new social movements can have an impact on social policy: when they are highly mobilized and have strong linkages to a left party in power, and a majority of them support a given policy. Thus, our analysis also confirmed the importance of popular mobilization and left parties for social policy expansion, a finding that has been firmly established in the literature on advanced capitalist democracies and is currently under debate in Latin America.

The analysis of Renta Dignidad has also revealed some of the ways in which social movements may assist with the passing of highly contested reforms. We have argued that the passing of the policy was possible, thanks to the large-scale, sustained mobilization of social movements allied with the MAS in key moments of the reform process. First, allied movements influenced the design of the policy. After exercising coordinated pressure through neighborhood associations, the Municipal Federation Association gained compensation for the decrease in the IDH. Conversely, opposition movements based on *Media Luna* departments backed by powerful economic elites did not gain any concession, and, particularly, the funding sources remained unaltered. Second, social movements allied with the MAS played a direct role when the passing of the legislation was in danger—that is, when the opposition outnumbered the MAS in the senate (and when movements allied with strong economic elites were also mobilized in the streets), social movements allied with the MAS strategically kept a vigil outside the Senate building and counterbalanced the pressures from the opposition. In other words, they assured that the law would pass—by using effective tactics, even if they were democratically questionable. Third, social movements allied with the MAS played a direct role in the implementation of the policy. After the bill passed in Congress, opposition movements took to the streets against the use of IDH as a way to fund the policy. In response, social movements allied with the MAS-staged large-scale mobilizations to express their unconditional support to the government and the bill, and they thus overpowered the pressure from the opposition.

The structure of the MAS as a new party, and as an example of one with close ties to a wide array of popular-sector social movements, crucially contributed to the success of this bill. Congress passed Renta Dignidad in a context of high levels of regional polarization between east and west, which characterized Bolivian politics during Morales' first term in office. Therefore, some of the most prominent protests appeared as a reaction to strategies from the, also mobilized, opposition. The movements with stronger, even if informal, linkages to the MAS were fierce supporters of this policy; against the threats from the opposition in the *Media Luna*, they mounted sustained, large-scale mobilizations in defense of Renta Dignidad and played a crucial and direct role in its passing. These mobilizations included the social movements that founded the

MAS as well as those movements that had become central for winning electoral majorities in the 2005 election.

It should also be noted that, even though the MAS has at times sought to use political resources to control its allies, these efforts have not always been successful. Indeed, as the literature on the internal politics of the MAS shows, allied movements have shown a remarkable degree of autonomy, mobilizing both for and against specific policies of the Morales government and placing real limits on his authority. This reveals that the impact of social movements on policy in Bolivia is far from straightforward and that in fact there are significant degrees of internal conflict within the MAS, specifically among its diverse constitutive movements. Contextual conditions of adversity (as having a weak position in Congress and a strong and mobilized opposition) and the specific characteristics of Renta Dignidad (as its universalistic nature) fostered unity among "old" and "new" movements. While they may have different redistributive preferences, both conditions helped allied movements to privilege common purpose over narrow or more particularistic organizational interests, which strengthened the reform coalition.

An obvious implication following our analysis is that the influence of social movements on social policies may vary according to such contextual conditions. For example, one could expect disparate social movements will have a reduced ability to join their forces and coordinate collective action when their allies have a stronger position in Congress or when a joint enemy is weakened. Consistent with this hypothesis, after the MAS was reelected in 2009 and won full control of Congress, Bolivia has moved into a period of exacerbated particularisms—one in which it has become increasingly difficult to pass important policy reforms addressing pressing issues of general interest, as the examples below illustrate.

After 2009, since the MAS gained greater institutional power and the opposition became weakened, the MAS became more "arrogant" and convinced that its early patterns of regular consultations with social movement allies were no longer imperative to guide party action and policy-making more broadly. However, Morales' centralization of decision-making has met frequent challenges from below, particularly by key allies. A turning point was the "gasolinazo," when Morales canceled fuel subsidies by decree after years of high levels of subsidization. This decision led to significant increases in the price of gasoline and, subsequently, to massive revolts against the policy. Although right parties benefitted from these mobilizations, they were not the organizers. Rather, these broad-based mobilizations were staged by groups in Morales's own political camp, including cooperative miners, neighborhood associations, labor unions, informal workers, and even coca farmers, among others. In the end, sustained mobilizations threatened governability and forced the government to annul its own decree (Anria 2015).

The conflict over Isiboro Sécure National Park and Indigenous Territory (TIPNIS) is another example of a policy promoted by the MAS that was reversed in response to the pressure exerted by allied movements. The conflict entailed a confrontation between the government and indigenous movements over the government's decision to build a highway through an indigenous autonomous territory.[8] Though the government first handled the conflict with repression, pressures from below, in the form of sustained

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[8] For a description of indigenous territories in Bolivia, see Hooghe et al. (forthcoming).

mobilizations, forced the government to espouse the autonomy rights of the TIPNIS, contained in the new constitution, and hold a process of binding consultation, which ultimately resulted in the suspension of the project.

Both examples illustrate instances where social movement mobilization interferes with what otherwise might have been a policy success of the allied party. Consistent with our analysis, they suggest that movements, even when they are crucial allies of a governing movement-based party, play different roles under different "constellations" of power. Their impact is shaped by context. Although we have neither explored this issue systematically, nor we have addressed the question of agenda setting more generally, future research should explore the relationship between the mobilization of social movements and the introduction of a broader range of policies. This could be done by considering periods of strong and weak polarization and varying degrees of party institutional strength. For example, are social movements more successful in bringing new policy issues to the agenda and passing legislation when their allies in power hold few institutional power resources or when allies are institutionally stronger? Are social movements generally more successful in translating their preferences into policies when they confront a strong opposition? We believe this is an important research agenda—one with potential analytical benefits for the literature on agenda setting in comparative politics and the literature on social movement outcomes in sociology, and one that merits more systematic analysis.

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