

Incentives for Organizational Participation: A Recruitment Experiment in Mexico

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Abstract:

This paper presents novel experimental evidence on the conditions under which citizens join interest organizations in democracies with weak institutions. We presented 1,400 citizens in two Mexican states with fliers promoting a new local interest organization to them. These posters contain one of four randomly selected appeals to encourage recruitment. We find strong evidence in favor of selective material incentives as a recruitment appeal. We further analyze response rates by prior organizational contact, finding evidence for a “particularistic socialization” effect wherein organizational experience is associated with greater response to selective material benefits and less response to purposive incentives. This effect is most pronounced among higher-income respondents, counter existing theories suggesting higher demand for patronage among the poor. Our findings show that under some conditions, rather than generating norms of other regarding, interest organizations can reinforce members’ individualistic tendencies.

Why do people participate in social and political organizations? Over fifty years ago, Clark and Wilson (1961) famously established a typology of “incentives”—material, solidary, and purposive—that organizations can offer to induce participation. Olson (1965) amended this theory with the observation that organizations typically need to offer *selective benefits*—rewards whose receipt is contingent on participation—to deter potential members from free-riding on the labor of the organization. However, we lack systematic evaluations of the effectiveness of these different types of incentives for different social strata and types of organizations. Furthermore, the world is full of organizations that sustain a large and active membership primarily through the pursuit of public goods, such as the environment and human rights, and organizations that pursue class interests that extend well beyond the immediate benefits enjoyed by members. In democracies, such “purposive” interest organizations play important roles in designing policy, holding politicians accountable for good governance, and making demands on behalf of broad social groups.

Under what conditions are citizens motivated to join organizations in pursuit of such collective goals and when are they primarily compelled by the promise of individual benefits? Classic research suggests that previous experience as an organization member is a key trait that shapes the types of incentives that people are likely to value. On the one hand, analyses in the Tocquevillian tradition have found that organizations socialize citizens to have an interest in the common good (Ahlquist, Clayton, and Levi 2014; Andrews et al. 2010; Han 2016; Putnam, Leonardi, and Nanetti 1994). Such *solidaristic socialization* can take place through multiple mechanisms, such as an increased sense of group identity, exposure to norms of reciprocity, or raised consciousness about policy issues that affect large social groups. Perhaps the most famous cases of solidaristic socialization are labor unions, which are credited with creating a working class identity and corresponding set of demands in nineteenth and early-twentieth century industrializing countries (Korpi 1983; Zolberg and Katznelson 1986).

However, in new democracies with weak institutions (Levitsky and Murillo 2009) and high levels of economic exclusion, the role that organizations play is more varied. While some organizations forge common bonds and a joint commitment to a set of transformative goals, others act as intermediaries for clientelistic exchange, reinforcing a self-interested calculus for citizens entering into collective endeavors (Holland and Palmer-Rubin 2015). Through such arrangements, organization leaders negotiate with state or party representatives for control over discretionary disaggregable benefits, in exchange offering to mobilize members politically on behalf of the patron. Organization leaders then allocate these state benefits—such as grants for housing, education, or for microenterprise development—selectively to encourage people to join the organization and motivate members to participate in activities.

In contrast to solidaristic socialization, those that operate primarily as clientelist intermediaries produce *particularistic socialization* among members. Through this process, members' predisposition toward individual benefits is reinforced; they come to the organization because of the promise of accessing government programs and stay in the organization for the same reasons. Most perniciously, the organization's activities may even disabuse members of any faith in the merit of collective undertakings as they observe that the organization dedicates the greater part of its energies to extracting government benefits and conditions access on individual involvement in organizational activities—such as participation in electoral rallies.

Organizational scholars have advanced significantly in understanding the factors that lead social movement organizations and interest groups into a short-term patronage orientation or a commitment to transformative goals. While some organizations may be formed with the main purpose to intermediate state resources, others pass through a process of “goal displacement,” where they abandon transformative goals to focus their efforts instead on extracting resources necessary for the organization's survival (Merton 1968; Piven and Cloward 1979; Selznick 1943).

However, the behavioral underpinnings of such theories have to be understood more fully and tested systematically, particularly in a developing country context where organizations' roles in politics diverge markedly between programmatic representation versus patronage brokerage. There are two fundamental aspects that deserve attention. First, we still know little about the factors that predispose some citizens to look to organizations as sources of private benefits and other citizens to join organizations in the pursuit of collective goals; in other words, whether and how they choose to become involved in specific types of organizations. Second, we know little about how organizations shape citizen's preferences towards selective and non-selective incentives.

Our study addresses this gap by experimentally testing long-held hypotheses regarding a) the differential effectiveness of distinct modes of organizational recruitment appeals; and b) the conditions under which organizational membership generates solidaristic or self-interested behavior, such that members perceive membership through a lens of common interests, even if selective incentives are involved, or through one of personal benefit only. The experimental design allows us to circumvent potential unobserved factors that typically shape both the types of recruitment appeals that citizens are exposed to and their degree of participation. For example, an observational study would likely find a strong correlation between poverty and participation in organizations that are centrally patronage-seeking. However, such a finding would not necessarily signal that poor citizens are more prone to respond to organizations that offer patronage over those that offer public goods; it could be that poor citizens are simply exposed to patronage appeals more frequently.

We conducted a large-scale behavioral recruitment experiment—alongside a survey—with representative population samples of two Mexican states (n=1,402). Participants were handed a flier advertising an organization that was new to their community. Even though the organization was

fictitious, respondents were led to believe that the organization was genuine during the experiment.¹ Separate versions of this flier mention different types of recruitment appeals, including help in accessing government distributive programs, demanding infrastructure improvements, educational services for members, and the suggestion that many peers were already participating. The effect of these experimental conditions and a placebo control that consisted of a flier that contained no specific appeal was measured on two outcomes. First, after reading the flier, the respondent was asked if she was interested in participating in the organizations' activities (declared interest). Second, if the response to this question was affirmative, the respondent was asked if she would provide her phone number to be contacted about attending an upcoming event (behavioral measure). This behavioral measure produces a more accurate depiction of the respondent's interest in participating by assigning a cost to an affirmative response in the form of the risk of potentially unwanted contact.

We have three main findings. First in line with Olsonian expectations and our own pre-registered hypotheses,² we find the most consistent support for the promise of excludable material goods as an effective recruitment tool. Under the control condition, 55.7 percent of respondents replied affirmatively to the declared interest measure and 27.3 percent to the behavioral measure,

¹ We took great care to minimize the potential risk to study participants. Respondents were informed that the organization was fictitious during a debriefing immediately after they finished participating in the experiment. For a detailed discussion of our strategies to minimize potential harm to respondents from their participation in this study and this use of deception, see the research protocol that was reviewed and approved by [Author's Institution's] Committee for Protection of Human Subjects (IRB Protocol 17-0096 and MOD 17-0096-01).

² A pre-analysis plan was registered with EGAP (#20170809AA) and the AEA RCT Registry (#AEARCTR-0002378) prior to data collection.

whereas under the treatment condition promising help in accessing disaggregable government benefits, these figures are 62.5 percent and 36.6 percent. These differences are statistically significant. In contrast, the *non-material* selective benefit treatment, which offered English and leadership classes to members, did not outperform the control, contrary to our expectations.

Second, counter expectations from the literature on patronage and clientelism predicting that the poor are predisposed to seek private goods through political engagement (Calvo and Murillo 2004, 743–45; Dixit and Londregan 1996, 1144; Stokes 2005, 315), participants' income does not appear to matter much for how they respond. Higher-income respondents do in fact agree to participate at slightly higher rates than lower-income respondents. Yet the treatment effect for the selective material incentives flier is larger among higher-income respondents than among lower-income respondents.

Third, while organizational membership has somewhat differential effects depending on the income level of the respondent, there is strong support for the “particularistic socialization” hypothesis. That is, current organization members (or people with organization members in their immediate social networks) responded more positively to the selective material treatment, while non-members responded more positively to the treatment emphasizing public goods.

Our study builds on and adds to a recent wave of experimental literature that analyzes the determinants of civic participation. Previous studies have documented the factors that lead citizens to vote (Gerber, Green, and Larimer 2008) and to participate in protests (McClendon 2014) as well as the determinants of politically relevant attitudinal outcomes such as preferences for redistribution (Kuziemko et al. 2015) and homophobia (Broockman and Kalla 2016). Other experimental studies have exhibited the transformative potential of certain types of organizations in producing activists (Han 2016). Extending these insights to organizational membership is valuable, given that this is a particularly influential and common mode of political participation, both in mature (Verba, Schlozman, and Brady 1995) and transitional democracies (Collier and Handlin 2009).

Mexico presents a particularly interesting case to carry out this experiment for two reasons. First, governments at the municipal, state, and federal levels offer a wide variety of social programs some of which are limited and discretionary, and are often appropriated strategically by elected politicians for political gain, and others that are broad-reaching and rule-based (Diaz-Cayeros, Estévez, and Magaloni 2016; Garay 2016). Second, Mexico presents a variety of both urban and rural organizations that rely on varied incentive structures to sustain collective action. Owing to its deep history of state corporatism, business and labor organizations embedded into the once-dominant Revolutionary Institutional Party (PRI) are relevant channels for distribution of state resources. Alongside these sectoral associations are others that profess greater autonomy, some of which have nonetheless succumbed to patronage-exchange relationships, converting into *organizaciones de gestión*.³

While recognizing the challenges to external validity that experimental research faces, the intervention conducted in Mexico allows us to test systematically the types of incentives citizens respond to and to identify who responds to what type of incentive. This provides insights about the potential presence of particularistic incentives in other cases such as India (Auerbach 2016; Thachil 2014) or Brazil (Bueno 2018; Gay 1990), where both patronage and programmatic organizations are present. Further replication of this study in other countries will be necessary to determine the degree to which these findings and the observed particularistic socialization effect are generalizable. Our contribution in this regard is both theoretical, as we articulate a new concept and hypotheses that can be tested in different settings, and empirical as we systematically test it in a crucial case.

³ There is no satisfactory translation for “*gestión*” in English, so we use the Spanish term throughout this paper. Hilgers (2018) defines *gestión* as: “negotiations for, or the processing of public goods or services in a private manner.” This word is common parlance among interest organizations in Mexico.

Interest Organizations: Recruitment and Socialization

Interest organizations as defined here are formally constituted collectivities, with established leadership roles and membership criteria, whose central purpose is to represent some group of interests or causes in the political system. Examples include organizations of workers (e.g. unions), business owners (e.g. chambers), members of a profession (e.g. bar associations, medical associations), identity groups (e.g. LGBT, indigenous), geographic groups (e.g. neighborhood), or sympathizers with a particular cause (e.g. environmentalism, gun reform, abortion regulation). Interest organizations are different from social movements in their durability and degree of bureaucratization, and distinct from social organizations (e.g. bowling leagues, fraternal organizations) in their mandate to represent specific interests or causes in politics. Compared with these other groups, interest organizations face many challenges; chief among these is maintaining an active membership.

It is this very durability and sustained collective action capacity, however, that empowers organizations to execute several fundamental roles in the political system. First, such organizations through lobbying and other modes of pressure politics are ideally suited for policy representation, as in congressional debates over trade policy in the United States where organized agricultural and business interests have traditionally acted as agenda setters and veto players (Hansen 1991; Schattschneider 1935). Second, organizations help connect citizens to political parties, by signaling which candidates stand to promote the interests with which the organization is aligned. In Latin America, labor unions affiliated to parties have been central for building partisan identities, mobilizing voters, and supplying candidates for public office (Collier and Collier 1991; Murillo 1997).

Given that these representative roles derive from a “programmatic” (Kitschelt 2000) or non-particularistic orientation to policy and the political process, such mass membership organizations are presented with something of a dilemma. On the one hand, their representative function demands a preoccupation with the well-being of broad population groups—industrial workers or corn farmers,

for instance. On the other hand, their ability to sustain collective action depends on the delivery of “selective benefits” (Olson 1965) that are excludable to members and contingent on participation.

Typology of Organizational Incentives for Recruitment

Building on Clark and Wilson (1961), we define four types of incentives that organizations may offer to potential members to encourage recruitment. These incentives vary based on whether they are material or non-material, and whether they are excludable or non-excludable (see Figure 1). We assume that some type of incentive is necessary for individual participation. Excludable benefits appear on the upper row of Figure 1. These are the types of benefits that Olson hypothesized as necessary to induce participation for most organizations. The first type, labeled “subsidies,” includes excludable material benefits such as cash, in-kind subsidies, discounts on goods or services, or protection from market competition. In the case of interest organizations, such material benefits may be obtained through the *gestión* process, wherein organization leaders aid members in accessing discretionary state distributive programs. But selective benefits need not be only material. Organizations may offer desirable “services” (upper-right) to members, such as training programs, social events, or information. While such benefits may be appealing, we expect that they hold greater sway over the decisions of middle-class rather than lower-class citizens, as the latter are likely to prioritize economic incentives given the decreasing marginal utility of financial rewards with income.

Non-excludable benefits are represented on the lower half of Figure 1. Non-excludable material benefits include incentives that elevate the material well-being of both members and non-members alike. In the labor sphere, this category would include improvements in wages or benefits that accrue both to unionized and non-unionized workers. In the policy realm, this category includes investments in public goods such as roads, schools, and public security. (These types of incentives would classify as “purposive” under Clark and Wilson’s typology.) A final category of incentives

includes those that are neither exclusive nor material. One type of incentive in this category relates to peer esteem (or “solidary” incentives).⁴ These incentives include a feeling of obligation towards one’s social group or the positive feelings of contributing to one’s community. Olsonian logic would suggest that the incentives on the lower half of Table 1 would not be conducive to recruiting members save in quite small-scale organizations. However, if solidaristic socialization does in fact take place, we may expect current organizational members to be predisposed to participate.

Figure 1: Types of Organizational Incentives

	<i>Material</i>	<i>Non-Material</i>
<i>Excludable</i>	Subsidies	Services
<i>Non-Excludable</i>	Public Goods	Peer esteem

Using this typology, we can produce a series of expectations about the effectiveness of distinct types of appeals under different conditions. First, as mentioned above, we expect excludable incentives to be more effective at recruiting members in general. *H1: Excludable incentives (subsidies and services) yield higher rates of participation than non-excludable incentives (public goods and peer esteem).*

⁴These benefits are in one sense “excludable” as social esteem may accrue specifically to those to contribute to the common good (McClendon 2014). However, it is rarely the case that participation in a given organization is the only (or even the principle) source of such esteem.

Second, given the greater desirability of a given material benefit to the lower classes, we expect subsidies and public goods to be relatively more effective at recruiting lower-income respondents than higher-income respondents. *H1a: The effect of material benefits (subsidies and public goods) is greater for lower-income respondents than for higher-income respondents.*

Solidaristic and Particularistic Socialization

Prominent literature on labor unions and other organizations has argued that organizations may sustain a purposive orientation through a dual incentives model (Ahlquist and Levi 2013; Andrews et al. 2010; Han 2016). First, they recruit members through the promise of selective benefits. Such benefits may range from access to social activities, to training in useful skills, to discounts at commercial establishments. (Alternatively, where organizational membership is mandatory, as in a “union shop,” selective benefits are unnecessary, yet desirable in order to induce voluntary participation.) Second, they expose members to a process of *solidaristic socialization* that aligns their own preferences with policies that promote well-being for larger population groups (such as all small-scale corn farmers, all small-business owners, or even all members of the “working class”). For instance, Putnam and collaborators (1994) argue that the very act of associational membership produces norms of reciprocity, orienting members to contribute to the common good.

But do organizations necessarily socialize their members in this way or may their influence operate in the opposite direction? That is, rather than producing a concern with collective interests, might exposure to organizations sometimes reinforce an egocentric approach to participation resulting in *particularistic socialization*? We would expect to find such an effect of organizational membership in conditions where organizations narrowly focus on the *gestión* process, because of the central role that such private benefits play for their survival or because these are the main resources made available to them by the state. In post-neoliberal Latin America intermediation of demand-based, discretionary

benefits has become a fundamental way to attract members and such *gestión* may impose restrictions on what organizations can do politically, especially if these groups are not strong. While some organizations have been able to use selective incentives to generate a common identity and press the state for broader policy goals—such as the social movements of the unemployed in Argentina (Garay 2016) or indigenous movements in Bolivia (Yashar 2004)—many organizations in Latin America lack the ability or strength to generate solidary incentives or a common set of collective goals.

To test these theories, a second set of hypotheses concerns the effect of prior organization membership on response to excludable versus non-excludable appeals. We pose two countervailing hypotheses. First, the theory of solidaristic socialization predicts that organization members are more likely to respond to non-exclusive appeals than non-members. *H2a: The effect of non-excludable benefits is greater for organization members than for non-members.*

The theory of particularistic socialization, however, predicts the opposite—that the experience of prior organization membership predisposes current members to respond at a greater rate to excludable benefits. *H2b: The effect of excludable benefits is greater for organization members than for non-members.*

It is quite likely the case that some organizations tend to generate processes of solidaristic socialization while others generate particularistic socialization. Given the lack of conceptualization of the latter in previous scholarship, however, the identification of a particularistic effect of organizational membership for some subset of the population or of organizations presents a new discovery and constitutes an important theoretical contribution. The next section fleshes out the empirical basis within Mexico where we test these hypotheses and the following section lays out the design of our recruitment experiment.

Interest Organizations in Mexico

The practice of *gestión*, wherein organizations intermediate social programs and resources for members, is widespread in Mexico. In particular for organizations that represent the most precarious, such as residents of urban slums or the rural poor, access to and selective allocation of these benefits is central to sustaining collective action. These benefits are important recruitment tools. Membership in these organizations can range from a few dozen to several thousand. For example, the Cardenista Peasant Central in the Valle de Toluca, has 3,500 members. This organization's leader reported that "upon joining [members] take on both obligations and rights. They have the right to apply for [subsidies for] housing or to raise sheep or whatever else. Their obligations are to fight for these benefits in marches and in election rallies...If they don't support the organization, well the organization doesn't support them either. It's reciprocal."⁵

Other *gestión* organizations are massive, as in the case of the National Peasant Confederation, the nationwide rural structure that is embedded in the PRI. An interviewed leader of this organization reported an elaborate pyramidal structure wherein base-level organizational brokers recruit members by promising subsidies and higher-level *dirigentes* (leaders) negotiate with party and government personnel for these discretionary distributive programs. The exchange of these handouts for political support cascades down the chain of command and those who prove capable of mobilizing more voters are rewarded with a larger share. In the July 2018 national elections, this leader claimed that the organization mobilized 230,000 voters in one state alone through this process.⁶

⁵ Interview by author with David Juárez Piña, President, Cardenista Peasant Central (Central Campesina Cardenista, CCC) Valle of Toluca, Mexico State, June 26, 2018.

⁶ Interview by author with Edgar Castillo, President, National Peasant Confederation (Confederación Nacional Campesina, CNC)-Mexico State, June 28, 2018.

This is not to say that *gestión* is the only activity that Mexican interest organizations engage in. There are several that focus their efforts on policies that affect broad economic sectors or entire neighborhoods, such as infrastructure improvements or regulatory policy, and more yet that combine these programmatic demands with the intermediation of patronage. What this research project seeks to uncover is the degree to which members look for particularistic benefits in organizations and become socialized to viewing organizations as primarily a source of particularistic benefits. In this case, those who have come into contact with organizations would exhibit a preference for organizations that offer individual benefits.

The process of *gestión* has its roots in a long history of corporatism based on party dominance and the weakening of popular organizations, which was constructed and cultivated from above by the PRI throughout the twentieth century. Confederations of labor unions, peasants, and other popular-sector professions were tied to the dominant party in an intricate system that granted privileged wages and benefits in exchange for party loyalty and campaign labor (Grayson 1998).

However, *gestión* in Mexico today is different from traditional corporatist intermediation and both coexist. For peasant organizations, the late-twentieth century neoliberal turn spurred the curtailment of the most valuable inducements to organizations, such as mandatory membership requirements, and intermediation of price guarantees for affiliated farmers. Subsequently, federal, state, and municipal governments adopted a cornucopia of demand-based support programs that purport to follow formula-based evaluation criteria, but are often allocated discretionarily in practice. The most common of these are *proyectos productivos* (productive projects)—which offer small cash or in-kind benefits for capital investments for small-scale farmers or microentrepreneurs—and housing programs that grant either space in public housing in urban areas or construction material to lay concrete floors or add a bedroom in rural areas. Organizational clientelism in both urban and rural areas typical operates through the intermediation of these programs (Fox 1994; Hilgers 2008).

Patronage politics does not afflict all classes of organizations equally. Labor unions, many of which continue to enjoy mandatory affiliation, tend to focus on wages and social security benefits for union members rather than discretionary programs accessed through *gestión*. Business chambers are quite prevalent, yet given the middle-class status of their members and ongoing corporatist supports that fund these organizations, *gestión* of state benefits tends to be less central to their political activity (Palmer-Rubin 2016). On the other hand, given their focus on housing and economic conditions for the most vulnerable, hundreds of neighborhood and peasant associations throughout the country specialize in intermediation of *proyectos productivos* and housing benefits. Lack of mandatory affiliation and the characteristics of access to selective programs, create a propitious environment for their dedication to *gestión* activities. Organizational clientelism is not a novel phenomenon for Mexico, but has arguably expanded in the neoliberal period as a result of the widespread presence of discretionary distributive programs and the growth of voluntary interest organizations. The operation of these organizations is reminiscent of the linkages established between squatters and their leaders as urbanization expanded in the early 1970s. According to classic research on the urban poor in Mexico during the heyday of one-party rule neighborhood leaders allocated government benefits and the spoils of land invasions selectively to reward those who participated (Cornelius 1975, chap. 6).

Experimental Design and Data

The experiment was conducted on representative samples of roughly 700 voting age citizens in two Mexican subnational units—Mexico City (the national capital) and the state of Chiapas, for a total sample size of 1,402. These units were chosen on the basis of two criteria. First, they have ample, yet relatively typical levels of organizational membership for Mexico, ensuring that our samples include

a sufficient number of organization members while preserving some degree of generalizability.⁷ Second, they have variation in the type of organizations that are most common—Chiapas has many indigenous and peasant organizations, but also urban areas with high degrees of professional and neighborhood organizing. Mexico City has many prominent neighborhood organizations, unions, and political activist organizations. We are confident that findings from these subnational units would extend to the bulk of central and southern Mexico, where popular-sector organizations proliferate and are commonly embedded in clientelist ties with political parties. However, our sample does not include citizens in Mexico’s wealthier northern states, where both popular-sector organizing and partisan patronage networks are less dense. Analysis in the paper uses pooled sample with both Chiapas and Mexico City respondents (replicated separately in Appendix C).

At the end of a face-to-face survey, enumerators handed a flier to the respondent with information on a (fictitious) organization (*Lazos Comunitarios* or Community Ties) that had allegedly recently started work in their community.⁸ Given that the experiment was conducted on a general population sample and not some subset with similar, narrow interests (e.g. members of a given neighborhood or profession), we presented the organization as general enough to appeal to any citizen. These conditions likely led to lower effect sizes compared with a scenario where respondents belonged to a defined population (e.g. rural or urban, lower-class or upper class, farmer or service-sector worker), which would have allowed us to tailor recruitment appeals to their interests.

⁷ A 2012 survey conducted by the Mexican government found that 9.4 percent of respondents from Chiapas and 19.1 percent from Mexico City reported belonged to some type of civic organization, while the national average is 14.9 percent (ENCUP 2012).

⁸ See fn. 1 for information on debriefing.

The particular appeals listed on the fliers were chosen to be of interest to both urban and rural populations of different socio-economic levels and to be representative of the types of demands and benefits that are typical to organizations across Mexico. Almost certainly, the average desirability of the various appeals varied. For instance, while the “public goods” treatment—mentioning demands to repair potholes and clean up parks—may be broadly appealing, the “services” treatment, offering classes in English and leadership, was likely of interest to a smaller segment of respondents. Such heterogeneity was difficult to avoid for a general population sample. However, the fact that each of the treatment conditions proved to be most successful on some subsample that we analyzed suggests that each of the types of appeals was realistic and influential in shaping respondents’ behavior.

English translations of the five versions of the recruitment flier are displayed in Figure 2.⁹ Each respondent was presented with one randomly selected version of the flyer. Respondents were not aware that there were multiple versions of the flier. Upon delivering the flier, the enumerator stated the following: *“To the people taking part in this survey, we are providing information about a nonpartisan civic association that recently started doing work in your community. Here is a flier from the civic association.”*

The *control* version of the flier, in the top left of Figure 2, contained only the organization’s name, slogan (“Join Community Ties, Working Together for the Community!”), fictitious website, and logo. The four treatment conditions included these same elements with additional messages.

The *subsidies* condition (top-center) stated: *“Gestión of government benefits: Productive Projects, Housing Subsidies.”* “Productive projects” (*Proyectos productivos*) is a commonly used term to refer to a variety of typically application-based programs where citizens propose economic ventures for which the government offers small cash subsidies or in-kind contributions. Housing subsidies offer money or materials to build or expand one’s dwelling or to lower rent. Both of these types of

⁹ See Appendix D for original versions of fliers in Spanish.

distributive programs are widely understood to be discretionarily allocated and frequently intermediated by interest organizations. And while the housing subsidies tend to be concentrated among the lower-income sectors only, it is quite common for middle-class citizens to also apply for productive projects to fund entrepreneurial activities, scholarships, or agricultural inputs alongside lower-income citizens. Variants of both types of programs exist for both urban and rural populations.

Figure 2: Control and Treatment Conditions

<p>Community Ties</p>  <p><i>Join Community Ties, working together for the community!</i></p> <p>www.lazosac.org.mx</p>	<p>Community Ties</p> <p><i>Gestión for government benefits:</i></p> <ul style="list-style-type: none"> > PRODUCTIVE PROJECTS > HOUSING SUBSIDIES  <p><i>Join Community Ties, working together for the community!</i></p> <p>www.lazosac.org.mx</p>	<p>Community Ties</p> <p>Fighting for better public spaces:</p> <ul style="list-style-type: none"> > SAFE AND CLEAN PARKS > STREETS WITHOUT POTHOLES  <p><i>Join Community Ties, working together for the community!</i></p> <p>www.lazosac.org.mx</p>
<p>Community Ties</p> <p>We offer workshops to our members:</p> <ul style="list-style-type: none"> > COMMUNICATION AND LEADERSHIP > MASTERY OF ENGLISH  <p><i>Join Community Ties, working together for the community!</i></p> <p>www.lazosac.org.mx</p>	<p>Community Ties</p> <p>Many members of your community are already participating.</p>  <p><i>Join Community Ties, working together for the community!</i></p> <p>www.lazosac.org.mx</p>	

The *public goods* condition (top-right) stated: “Fighting for better public spaces: Safe and Clean Parks, Streets without Potholes.” Again, the appeals in this condition were chosen to be relevant to both lower- and middle-class residents in both cities and in the countryside. Participation in an organization that pushes for better public spaces, however, is likely to be dampened by free-rider tendencies, as both participants and non-participants can enjoy these improvements.

The *services* condition (lower-left) stated: “We offer workshops to our members: Communication and Leadership, Mastery of English.” These incentives qualify as excludable, given that the flier clearly communicates that they are limited to members. But rather than material benefits, the incentives are non-material activities that promise to build human capital. This treatment condition presented a challenge in devising an attractive appeal, given the wide variety of profiles of participants.

Finally, the *peer esteem* condition (lower-right) stated: “Many members of your community are already participating.” Rather than some specific benefit, either selective or non-selective, this message communicated that participation in the organization was a community norm, potentially arousing feelings of obligation. This type of message has been shown to encourage pro-social behavior in other settings, as in mailers sent to tax evaders in the UK stating that they are among a small minority of citizens who have not paid taxes (Hallsworth et al. 2017). Stronger social pressure may have been signaled by notifying the respondent that the names of participants would be publicized to the community, in line with the finding that the suggestion of publication of electoral participation increases turnout (Gerber, Green, and Larimer 2008). We chose not to include such a message out of concern that it may intimidate the participants, particularly in a context where participation in political organizations can expose citizens to violence from political rivals. Furthermore, a message oriented to in-group esteem (McClendon 2014) may have suggested that they have an obligation to their specific group (e.g. indigenous community). However, owing to the broad group of participants in the survey, defining such an in-group was unfeasible for individual participants.

The outcome—interest in participation in the organization—was measured in two ways. First, after reading the flier, the participant was asked if she was interested in participating in the organizations’ activities (declared interest). Second, if the response to this question was affirmative, the participant was asked if she would provide her phone number to be contacted about an upcoming event (behavioral measure).¹⁰ This behavioral measure produces a more accurate depiction of the respondent’s interest in participating by assigning a cost to an affirmative response in the form of the risk of potentially unwanted contact. Thus, it filters out “cheap talk” or respondents who reply in the affirmative to the first question out of an interest in projecting a certain image to the interviewer. There is a significant drop-off from the declared interest measure to the behavior measure (from 55.3 percent of respondents to 30.8 percent).

Responses to the survey questions preceding the recruitment experiment permitted us to analyze heterogeneous treatment effects within and across different subgroups, based on income levels, prior organizational membership and other participant traits.

Analysis

As shown in Table 1, our central expectation that distributive benefits would be most effective at encouraging member recruitment is borne out by the evidence. For the primary dependent variable—the behavioral measure of interest in joining the organization by providing one’s phone

¹⁰ The specific text of the declared interest prompt read: “¿Estaría interesado(a) en participar en esta asociación?” (“Would you be interested in participating in this association?”). The prompt for the behavioral measure read: “¿Nos daría su número de celular para que podamos informarle sobre la próxima reunión de la asociación?” (“Would you be willing to give us your cellular phone number so that we can contact you about this association’s next meeting?”).

number—there is a nine-percentage point treatment effect corresponding to the flier that presented the organization as offering *gestión* of housing and economic subsidies. Furthermore, the public goods treatment—promising to push for clean and safe parks and streets without potholes—yielded a significant positive effect of roughly equal magnitude. However, there is no significant effect for the services treatment, an excludable but non-material type of benefit. Likewise, there is no significant effect for the peer esteem treatment.

Table 1: Overall Findings

	Interested in Joining	Offer Phone Number
Subsidies	6.7%* (62.5%)	9.3%** (36.6%)
Public Goods	0.4% (56.1%)	8.6%** (35.9%)
Services	0.2% (55.9%)	0.5% (27.8%)
Peer Esteem	-9.3% (46.4%)	-1.2% (26.1%)
Control	55.7%	27.3%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$; $N = 1,402$. For each treatment condition, the top number is treatment effect and the bottom number is raw proportion responding affirmatively. P-values correspond to differences between the treatment condition and control in same column on one-tailed t-test.

The effectiveness of subsidies is mirrored in the secondary outcome that measures whether subjects verbally express an interest in participating in the organization (Column 1 of Table 1). The subsidies appeal yielded a 6.7 percentage point increase in respondents’ interest to join the organization (significant at the 0.10 level). However, the non-excludable benefits in the form of public goods did not yield increase in respondents claiming to be interested in joining the organization. Unexpectedly, the peer esteem treatment performs significantly *worse* than the control in the declared

interest measure (not denoted as significant in the table due to one-tailed tests). Perhaps upon hearing that many of their neighbors were already participating, respondents either felt that their own participation was unnecessary or were put off by the potential of interacting with many people.

Table 2: Members vs. Non-Members

	Interested in Joining		Offer Phone Number	
	Members	Non-Members	Members	Non-Members
Subsidies	2.2% (70.5%)	11.9%** (56.5%)	12.9%** (43.9%)	6.5% (30.6%)
Public Goods	-8.2% (60.0%)	8.2%** (52.8%)	0.3% (31.3%)	14.7%** (38.9%)
Services	0.7% (68.9%)	3.6% (48.2%)	-1.4% (29.6%)	3.2% (27.4%)
Peer Esteem	-18.6% (49.6%)	-0.2% (44.4%)	-1.1% (29.9%)	-1.9% (22.2%)
Control	68.2%	44.6%	31.0%	24.2%

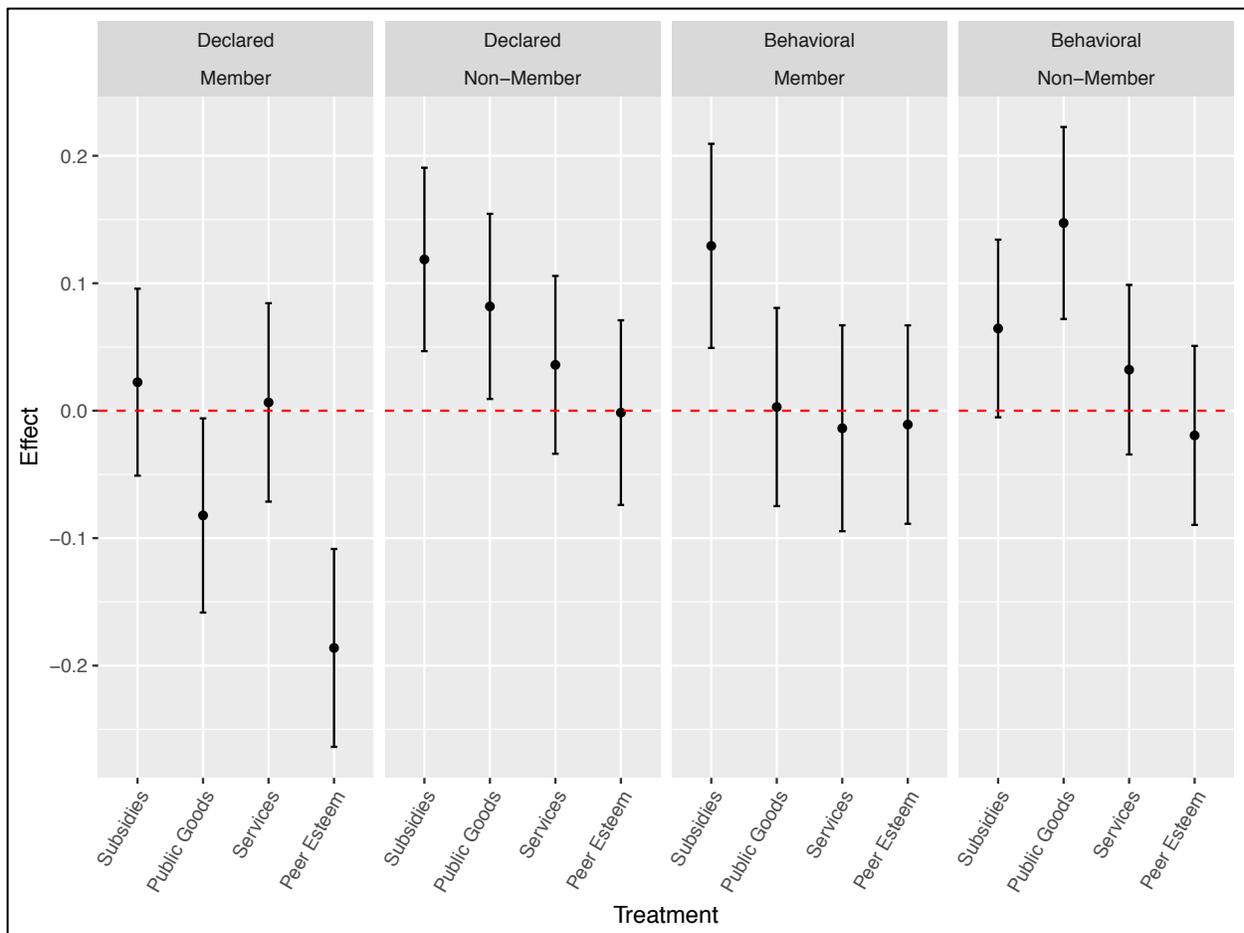
*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$; Members N = 624; Non-Members N = 749. For each treatment condition, the top number is treatment effect and the bottom number is raw proportion responding affirmatively. P-values correspond to differences between the treatment condition and control in same column on one-tailed t-test.

We further disaggregate results by whether the respondent belongs to some type of social organization or is in the same social network as somebody who belongs to an organization (Table 2).¹¹

¹¹ The types of organizations that we include are labor unions, peasant associations, neighborhood associations, business associations/chambers, and associations belonging to the PRI's "popular" sector (CNOP). (The "members" category includes those respondents with a member in their immediate social network, as do the analysis throughout the body of the paper. Appendix A reproduces Tables 2, 3, and 4 on subsamples that classify members only as those with personal organization membership.)

Figure 3 reproduces these findings graphically. If non-selective treatment conditions (public goods and peer esteem) are more effective for members than for non-members we would interpret this as supporting the solidaristic socialization thesis that belonging to organizations produces norms of collective consciousness and other-regarding behavior. In contrast, if the treatment effect of the subsidies flier is larger for members than for non-members, we would interpret this as evidence in favor of particularistic socialization.

Figure 3: Members vs. Non-Members



Note: Figure displays average treatment effects and 90% confidence intervals.

First, current members of organizations are more likely to profess an interest in joining our new fictional organization and are more likely to offer their phone numbers than non-members. For the

declared interest outcome, the only significant finding for members is the negative treatment effect for the peer esteem flier. While over two-thirds of members in the control group professed an interest in participating, less than half of organization members receiving the peer esteem treatment expressed an interest. No such negative effect appeared for non-members. However, in the declared interest outcome for non-members, we find a positive effect for the subsidies and public goods treatments.

Table 3: Low-Income vs. High-Income by Membership, Offer Phone Number

	Low-Income		High-Income	
	Members	Non-Members	Members	Non-Members
Subsidies	11.4% (42.6%)	7.3% (32.3%)	21.1%** (58.3%)	-9.0% (30.4%)
Public Goods	-1.7% (29.5%)	12.0% (37.0%)	-0.3% (37.0%)	14.2%* (53.6%)
Services	-3.6% (27.7%)	7.8% (32.8%)	0.5% (37.8%)	-13.3% (26.1%)
Peer Esteem	14.2%* (45.5%)	-5.6% (19.4%)	-13.4% (23.8%)	-7.3% (32.0%)
Control	31.3%	25.0%	37.3%	39.3%
<i>N</i>	277	294	253	299

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. For each treatment condition, the top number is treatment effect and the bottom number is raw proportion responding affirmatively. P-values correspond to differences between the treatment condition and control in same column on one-tailed t-test.

Once we move to the behavioral outcome—offering one’s phone number—the apparent role of organizations in conditioning preferences for different types of appeals differentiates between members and non-members. Organization members respond positively to the offer of private material benefits and non-members respond positively to the public goods treatment. Given our increased confidence in the behavioral treatment, these findings suggest sobering results for the impact of interest organizations in Mexico on citizens’ political engagement. In short, those who have been exposed to organizations have learned what they are principally good for—“getting stuff” from the

state. Citizens who do not belong to an organization are more likely to see merit in joining an organization in pursuit of the common good.

The next step is to consider the effect of income on relative preferences for different types of recruitment appeals. Literature on clientelism and patronage politics more broadly produces the expectation that lower-income respondents would be more likely to demand excludable material goods than public goods given the higher marginal value that such benefits provide and their more precarious social positions. It would follow that low-income citizens would find material appeals from organizations relatively more appealing than would higher-income citizens. Table 3 splits the sample into low- and high-income groups, based on whether the respondent was below or above the median in a categorical income question, focusing on the behavioral measure of participation.¹²

Our findings do not support existing theory about the effect of income on demand for particularistic benefits. Among low-income respondents, we do not find a significant treatment effect for the subsidies appeal for either organization members or non-members. In contrast, high-income organization members exhibit a remarkably high response rate to the subsidies treatment. Over 58 percent of these respondents agreed to provide their phone number when presented with an organization that offers help in accessing government subsidies. In contrast, high-income non-

¹² This question was derived from the Latin American Public Opinion Project's (LAPOP) 2016 Mexico survey and included 17 ordinal categories of income. Those classified as low-income reported household income of no more than 3,700 Mexican pesos per month (about 200 USD), while those classified as high-income reported monthly earnings above this amount. These findings are robust to alternate specifications, including income levels differentiated by state (given higher average incomes in Mexico City than Chiapas), level of education, poverty rate in the respondents' electoral section and whether the respondent resides in an urban or rural municipality. See Appendix B.

members responded positively to the public goods treatment, but not to the subsidies treatment. These findings suggest that the particularistic socialization effect of organization membership found in Table 2 is driven mainly by high-income organization members.

Finally, in Table 4, we analyze members of different types of organizations, breaking them down into members of labor unions, peasant associations, neighborhood associations, and business associations. Union members exhibited the highest response rate to the control flier (and overall), suggesting that union membership produces a greater participatory ethos among citizens than other types of organizations. Furthermore, there was no treatment effect for the subsidies appeals for union members. Union members appear not to have been socialized to organizational *gestión* as have members of other interest organizations. However, we found a negative treatment effect among union members for the public goods treatment—promising to push for clean and safe parks and streets without potholes—suggesting that unions in Mexico also do not socialize members to pursue initiatives outside of unions’ agenda, typically centered on labor and wage demands.

Table 4: Distinct Types of Organization Members, Offer Phone Number

	Unions	Peasant Assoc.	Neighborhood	Business
Subsidies	0.8% (44.1%)	11.4% (46.3%)	14.0%* (43.1%)	2.6% (33.3%)
Public Goods	-15.5% (27.8%)	-0.2% (34.6%)	5.3% (34.4%)	-0.8% (30.0%)
Services	-4.8% (38.5%)	0.4% (35.3%)	-2.0% (27.1%)	13.7% (44.4%)
Peer Esteem	-7.6% (35.7%)	3.0% (37.8%)	9.2% (38.3%)	-2.2% (28.6%)
Control	43.3%	34.9%	29.1%	30.8%
<i>N</i>	302	220	293	54

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. For each treatment condition, the top number is treatment effect and the bottom number is raw proportion responding affirmatively. P-values correspond to differences between the treatment condition and control in same column on one-tailed t-test.

It is in fact members of peasant and neighborhood associations for whom subsidies appeals exhibit a positive treatment effect. (This effect falls just short of statistical significance— $p=.11$ —for peasant associations.) This finding is unsurprising, as these are the types of organizations that routinely operate clientelistic networks in rural and urban Mexico, respectively (Fox 1994; Hilgers 2008; Claudio A. Holzner 2004). Perhaps not coincidentally, these are also the organizations that have access to the widest variety of discretionary distributive programs, such as for housing and agricultural inputs.

We find no significant effects for business organization members, likely due to the low number of respondents in this category. The effect of the services treatment (courses in leadership and English) for this group is large and positive, however, although does not approach statistical significance ($p = .27$). Such an effect would align with the expectation that this relatively higher class and more entrepreneurial population is motivated by these non-material selective benefits that promise to increase human capital.

Probing the Mechanisms: Selection or Socialization?

The main threat to our findings regarding the effect of organization membership on response to different modes of appeals is the possibility of a selection effect. That is, perhaps it is not the experience of participating in an organization (socialization) that produces particularistic preferences, but rather that a preference for private goods is what motivates organizational membership in the first place (selection). To adjudicate between these two possibilities, we here observe differences between members and non-members across a series of covariates. We divided these variables into relatively immutable socio-demographic factors versus political traits that may be outcomes of organizational contact. Given relative uniformity on the former group of variables and stark differences between members and non-members on the latter, this exercise produces suggestive evidence in favor of a socialization rather than selection mechanism.

Table 5 compares organization members and non-members on a series of variables derived from the survey that accompanied the recruitment experiment. Members and non-members are relatively balanced on socio-demographic traits. The fact that members are not on average poorer, less educated, or work more in the informal sector is strong evidence against the possibility that the association between organization membership and preferences for private material goods is confounded by economic precariousness. Members *are* significantly more likely to live in rural areas. However, our main findings are consistent across rural and urban subsamples (Appendix B) and samples restricted to Chiapas (a highly rural state) or Mexico City (Appendix C).

Table 5: Comparing Members and Non-Members on Covariates

Variable	Members	Non-Members	Difference
<i>Socio-Demographic Traits</i>			
Female	.474	.513	-.037
Age	41.3	40.5	.81
Rural	.360	.193	.168***
Income (ordinal)	8.83	9.09	-.261
Education (ordinal)	5.49	5.67	-.175
Informal Sector	.404	.404	.000
<i>Political Traits</i>			
Protest/Rally Participation	.362	.204	.158***
Voted in 2015	.708	.606	.102***
Partisan	.612	.471	.141***
PRI Partisan	.163	.113	.050***
Beneficiary	.577	.405	.172***
Clientelism	.408	.355	.063**
<i>N</i>	627	752	

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. P-values correspond to differences between members (including social network members) and non-members on two-tailed t-test.

On the other hand, there are consistent differences between members and non-members on political traits. Members are significantly more likely to participate in electoral and non-electoral politics and to be partisans of the PRI, the party most strongly associated with *gestión* through interest

organizations. Several of the political traits may in fact act as mechanisms that shape members' propensity to see organizations as sources of particularistic benefits. For instance, members are more likely to have partisan affiliations, to be beneficiaries of social programs, and to know somebody who has been exposed to clientelism. These three tendencies are consistent with having been exposed to the process of *gestión*. It is certainly plausible that some of these traits precede organizational participation and make citizens more likely to join organizations in the first place. However, the overall similarities across members and non-members on socio-economic traits, but contrasts in political behaviors is consistent with organizational contact producing particularistic preferences among citizens who otherwise are similar to those who do not have contact with organizations.

Conclusion

This project contributes to the literature on interest organizations by experimentally testing longstanding hypotheses about participation in organizations and by developing a new mechanism for the reproduction of patronage politics in weakly institutionalized democracies. Our findings reinforce received wisdom about the centrality of selective incentives to induce organizational participation while also controverting existing theories about the traits of persons that make them more or less receptive to appeals based on the collective good. On the whole, organizations that promise to intermediate particularistic benefits from the state were most successful at recruiting new members, compared with those that promised to demand improvements in public goods, deliver non-material services to members, or generate peer-group esteem. However, such incentives did not turn out to be most appealing to lower-income participants or those without previous organizational participation, as previous scholarship would lead us to expect.

Our findings offer support for the presence of particularistic socialization, where exposure to organizations that specialize in patronage produces in members the expectation of material selective

benefits for future organizational participation. Not all segments of the population are equally exposed to these pressures, however. Surprisingly, the heightened particularistic orientation was most pronounced among higher-income, rather than lower-income organization members. And low-income organization members were the only subgroup analyzed that responded positively to the suggestion of a norm of community participation, lending an air of contingency to previous findings about the participatory effect of social pressure.

These findings underscore the importance of a research agenda that considers not only “*how much* civil society” as an explanatory variable for important political outcomes, but rather “*what kind* of civil society.” Scholars have previously identified exceptions to the notion that a robust civil society favors democracy (Gellner 1994; Putnam, Leonardi, and Nanetti 1994), showing how the predominance of illiberal civic associations can accelerate democratic erosion (Berman 1997; Chambers and Kopstein 2001; Riley 2010). The data presented here offer a qualification to scholarship that argues that associational membership socializes citizens to be concerned with collective interests. Under certain conditions, interest organizations that are designed to represent broad population groups in policymaking may rather reinforce a preference for individual benefits among members. This finding is particularly relevant for transitional democracies, where a robust, accountability-generating civil society is most needed, yet also the context where organizations are most likely to deviate from purposive goals in response to patronage appeals. Future research should explore whether particularistic socialization occurs in more mature democracies. Lacking widespread discretionary distributive programs, we would not expect to find this dynamic to the same degree.

We would also advocate further testing these hypotheses using a field experiment involving actual organizations with legitimate recruitment appeals. While such a research design offers a stronger version of the treatment, it is also true that it may be affected by the reputation of existing organizations and of political parties these organizations may be connected to. It is notable still that

our research, which included a fictitious general interest organization and not especially strong treatments yielded large effects.

What this paper furthermore advances is a novel research agenda focused on perceptions about collective action that are developed within different types of organizations and their effect on future organizational membership. In this study we focused on interest organizations and paid special attention to unions, peasant organizations, neighborhood associations, and business associations in a country with a long-standing corporatist tradition and limited internal democracy within these organizations. We found that organizational membership does shape the ways that citizens approach the prospect of future organizational participation. Several questions emerge: How do similar groups operate in other countries where comparable corporatist structures exist, but in which a higher concentration of internally democratic and civic-minded associations and unions have emerged alongside business unions and patronage organizations (e.g. Argentina)? And how do interest organizations that are deliberately excluded from the distribution and intermediation of state resources—as are many organizations in Chile—socialize their members? What is the effect of patterns of socialization on organizational recruitment and membership size?

As political parties have been declining in their role as conduits for ideological appeals, interest organizations and social movements may be fundamental spaces, not only in advanced but also in new democracies, for citizen engagement with the state and with politics. How different organizations socialize citizens provides an important avenue to understand less perceptible forms in which patterns of solidarity and self-interested behavior are built and sustained.

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