

Travelling concepts of party institutionalization? A comparative perspective

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Abstract Concepts of party institutionalization and party change were developed during the 1980s with regard to the European mass party model of party organization. Since then we have been observing the breakthrough of new political parties from the whole political spectrum in both, ‘established’ and ‘young’ democracies. But the birth and institutionalization of parties has been analyzed separately in different world regions. The focus of analysis in these research studies is either on Western parties and established party systems or on parties and party systems in ‘young’ democracies.

We argue that we should integrate this coexisting research to get a better understanding for the context-specific aspects of a party’s first steps of establishment in the party system.

This article, first, gives a review on the main analytical concepts of party institutionalization and party change and clarifies how they travelled through different world regions. Second, it discusses the approaches and outcomes of the different contribution made to this special issue. Where do we find commonalities and differences in the analytical concepts – and in their applying in different world regions? How can the comparative analysis of party institutionalization processes benefit from these findings?

It is our primary contention in this article, as well as in the entire special issue, that the building of concepts and theory on the institutionalization of political parties can be enhanced by bringing together the research on party institutionalization and party change in different world regions (areas) and by recognizing, that it is a multi-

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dimensional (objective, internal and external) and sequential process. Therefore we seek a unified language to talk about party institutionalization and clearer boundaries of the concept when we analyze it comparatively in different areas of the world.

Keywords Party institutionalization · Party change · New parties · Party origin · Cross-regional analysis

Konzepte der Parteieninstitutionalisierung. Eine vergleichende Perspektive

Zusammenfassung Konzepte, die Institutionalisierung und Wandel von Parteien erklären, wurden in den 1980er Jahren ursprünglich vor dem Hintergrund des Modells der Massenpartei und mit europäisch-westlicher Perspektive auf die Entstehungs- und Verankerungsphasen von Parteien entwickelt. Seither – und vor allem in den letzten fünf Jahren – können wir vermehrt das Aufkommen neuer Parteien in ‚etablierten‘ wie in ‚jungen‘ Demokratien beobachten. Dennoch wird in diesen ‚verschiedenen Welten‘ (areas) mehr oder weniger getrennt voneinander die Entstehung und Institutionalisierung von Parteien untersucht. Die Forschung konzentriert sich dabei entweder auf Parteien und ‚etablierte‘ Parteiensysteme westlichen Typs oder auf Parteien und Parteiensysteme in ‚jungen‘ Demokratien.

Diese Parallelität der Forschungslinien möchten wir – in diesem Aufsatz und im gesamten Sonderheft – überwinden und damit einen wichtigen theoretischen Beitrag zur Parteieninstitutionalisierungsforschung in unterschiedlichen Regionen leisten.

In einem ersten Schritt diskutiert der Beitrag die zentralen Konzepte der Parteieninstitutionalisierungs- und Party Change-Forschung und legt dar, wie sie Anwendung in unterschiedlichen Regionen finden. Zweitens, stellen wir die Ansätze und Ergebnisse der Beiträge dieses Sonderheftes vor. Wo finden sich Gemeinsamkeiten und Unterschiede der Analysezugänge – und ihrer Anwendung in unterschiedlichen Regionen? Und wie können die Erkenntnisse für die komparative Forschung von Parteieninstitutionalisierungsprozessen fruchtbar gemacht werden?

Wir argumentieren, dass die Weiterentwicklung von Ansätzen und Theorien zur Institutionalisierung von Parteien in unterschiedlichen Regionen davon profitiert, wenn Party Change- und Parteieninstitutionalisierungskonzepte zusammen gedacht werden. Wir benötigen zudem einheitliche Begriffe, wenn wir über Institutionalisierungsprozesse sprechen und eine klare Definition der Grenzen des Konzepts. Parteieninstitutionalisierung verstehen wir in diesem Sonderheft als den multidimensionalen (objektiven, internen, externen) und sequentiellen Entwicklungsprozess von der frühen Formierung einer Partei zur Institution (‚institution-hood‘).

Schlüsselwörter Parteieninstitutionalisierung · Party Change · Neue Parteien · Parteigründung · Cross-regional analysis

1 Introduction and Acknowledgements

Over the past years, political parties and party systems in democracies worldwide developed a new shape. New parties from the entire political spectrum emerged and challenged established parties. New party types occurred. Minor or insignificant parties rose whereas established parties diminished. Some parties had their breakthrough on the regional, others on national level. Some lasted for one or two legislations only, others gave us the impression that they would be a relevant player in their political system for a longer time—or even become the ruling party. Overall, party and party system change is going on, maybe even faster than before. This change, namely the rise and establishing process of (new) political parties, is addressed in this special issue, for two reasons.

First, the birth and change of political parties is a most relevant research area since parties are pivotal players in all democracies. Political parties are largely free to organize in ways that help them attain their goals (Strøm 1990), which vary across cases and within cases over time. However, and despite parties' ability to reorganize themselves for ensuring organizational survival, there is no guarantee for the survival of a party: in democratic political systems, parties emerge but also disappear. Their lifespan varies (Pedersen 1982, 1991). Changing circumstances as well as perceived internal and external shocks push parties to change, to renew or reinvent themselves (Harmel and Janda 1994). Thereby, a key to party survival is precisely their ability to adapt to steadily changing social, political and electoral realities (Katz and Mair 1995; Mair 1997; Barnea and Rahat 2010). To adapt to these realities and to gain and keep the status that we call 'institution-hood', often parties must undergo change, including institutional reforms. These aspects are the first and foremost reasons, why we address the development of a party from its origin to an institution—the timespan of a party's life that we call institutionalization.

Second, for methodological reasons of party research, we seek a unified language—a coherent understanding and conceptualization—to talk about party institutionalization in different areas of the world. Therefore, we need to define clearer boundaries of the institutionalization concept when we analyze it in a comparative, trans-regional perspective. For these analyses, the concepts of party change that have been developed in the 20th century with regard to the emergence and change of the European party models (e.g. mass party, cartel party etc.), are limited. The party institutionalization approach has the advantage of travelling better to new democracies because it does not presuppose the historical development of specific party models. That made it attractive to be employed in different world regions but led to a disconnect: The focus of analysis in research studies is either on Western parties and established party systems or on parties and party systems in so-called young democracies. We argue that we should integrate this coexisting research on party institutionalization processes in different world regions to get a better understanding for the context-specific aspects of a party's first steps of establishment in the party system.

As the idea of the special issue took shape, the authors made two important decisions. First, all articles should adopt the understanding of party institutionalization as a multi-dimensional and sequential process that includes internal and external

aspects, most of them referring to value-infusion and routinization as important indicators of an internally institutionalized party. Second, every contribution should strengthen our understanding of how to analyze party institutionalization comparatively in different world regions. The outcome is a coherent compilation of pieces that make an important contribution to developing and/or testing of theory for the comparative analysis of party institutionalization in democracies.

The contributors are experienced scholars of political parties, most of whom presented earlier versions of their work at one or all three of workshops that were held on this topic in 2015, 2017 and 2018. Therefore, we want to acknowledge a number of debts. First, we need to thank the Research Section for Comparative Politics of the German Political Science Association (Deutsche Vereinigung für Politikwissenschaft, DVPW) and the German Institute of Global and Area Studies (GIGA) for accommodating our panel on “Different Worlds of Party Development” in Hamburg 2015. Second, we need to thank the Standing Group on Political Parties of the European Consortium for Political Research (ECPR) for endorsing the section on “New Parties in Europe” in Hamburg 2018 as well. Third, we are grateful to the Heinrich Böll Foundation and the NRW School of Governance at the Institute for Political Science (University of Duisburg-Essen) for funding and accommodating our author’s workshop in Duisburg 2017. Furthermore, we are very grateful to the many anonymous reviewers whose expertise advanced the different articles of the special issue, as well as to the editors of *ZfVP* for letting us realize this issue. Many thanks to the editorial team of the *ZfVP* (especially Christoph Mohamad-Klotzbach), as well as the production team at Springer (especially Marina Litterer) for many kindnesses and much professionalism. Finally, the two of us thank our contributors for their outstanding cooperation and patience with the editors during the lengthy process of setting up this special issue. For us, it was a great experience to bring together scholars of party institutionalization worldwide: it was both educational and enjoyable.

This introductory article gives a review on the main analytical concepts of party institutionalization and clarifies how they travelled through different world regions. It also summarizes the approaches and outcomes of the different contributions made to this special issue. Where do we find commonalities and differences in the analytical concepts—and in their application in different world regions? How can the comparative analysis of party institutionalization processes benefit from these findings?

It is our primary contention that the building of concepts and theory on the institutionalization of political parties can be enhanced by bringing together the research on party institutionalization and party change in different world regions (i.e. areas). In addition to this, it is important to recognize that party institutionalization is a dynamic, multi-dimensional process that consists of different sequences of party institutionalization, rather than a fixed status. In this special issue we bring together contributions that add to the refinement of the party institutionalization concept, as well as articles that strengthen our understanding of how to analyze and ‘measure’ party institutionalization empirically and, finally, pieces that tell the story of the development of political parties in democracies around the world towards what we call ‘institution-hood’.

2 How concepts of party institutionalization travelled the world

In international political party research, a multidimensional approach of party institutionalization is gaining increasing traction. Despite the field's diversity, it can be summarized in three key components: objective, internal and external aspects (Harmel et al. 2018; Harmel and Svåsand 2019). Our understanding, which we discuss later in this article, sides with this multidimensional definition and refers to the establishing process of a party in different sequences from its formation up to an institution.

Although the concept of party institutionalization started travelling successfully in the last years, there is a lack of cross-regional or at least comparative analyses that apply the concept empirically. Apart from some cross-national studies on new parties of special party families in Western democracies (Harmel and Robertson 1985; Mair 1999; Krouwel 2012; Bolleyer 2013) or on small parties in Western Europe (Müller-Rommel and Pridham 1991), most studies on the institutionalization of political parties are small-*n* case studies. And although political parties play an important role in comparative politics (Lijphart 1999; Luther and Müller-Rommel 2005; Kneuer and Lauth 2015), comparative analyses of party institutionalization in the so-called young democracies are rare (except e.g. Basedau and Stroh 2008, applying an index of party institutionalization on 28 African political parties)¹. Some of this issue's contributions have addressed these lacks by answering on questions like "are the three dimensions objective, internal and external institutionalization applicable to different world regions? Can we distinguish between those dimensions empirically? Which variables have an effect on the 'performance' of a (new) party in each dimension?".

In the following, we review five approaches of party institutionalization (Huntington 1968; Panebianco 1988; Rose and Mackie 1988; Janda 1980, and Levitsky 1998) and the main approaches of the party change literature (Pedersen 1982; Poguntke 2002; Bukow 2013; Bukow and Poguntke 2013; for an overview see e.g. Wiesendahl 2010 and Korte et al. 2018). We also discuss the development or application of these concepts—or aspects of these concepts—in different studies of party institutionalization worldwide (Dix 1992; Lewis 1994; Randall and Svåsand 2002; Basedau and Stroh 2008; Bolleyer 2013; Weissenbach 2016; Harmel et al. 2018; Harmel and Svåsand 2019). By doing this we summarize differences and commonalities of these approaches in different world regions to build the theoretical grounding for the following contributions in this special issue.

The first scholars to bring forward thought-out approaches regarding party and party system institutionalization were Huntington (1968), Janda (1980) Panebianco

¹ Mainwaring and Scully (1995) assess different levels of party system institutionalization in 12 Latin American countries whereas Kuenzi and Lambricht (2001) provide a description of the levels of party system institutionalization in 30 African countries and Mainwaring and Zoco (2007) examine the correlation of consolidation of democracy and stabilization of the party system in democracies. All of them are focusing on the interdependence of party system institutionalization and democratic consolidation of a 'young' democracy. Because our approach is focusing on the institutionalization of individual parties and not on party system institutionalization we are not including these studies in our review. Although we acknowledge that the requirements of both concepts are connected.

(1988) and Levitsky (1998). Samuel Huntington was the first to discuss the concept in his seminal work *Political Order in Changing Societies*. He argues that the criteria introduced by him are not only useful for the study of political change but applicable to parties as well. Huntington defines the term institutionalization as “the process by which organizations and procedures acquire value and stability” (Huntington 1968, p. 12). While the criterion stability might not be surprising, it alone is not sufficient for the institutionalization of a party organization. Rather organizations need to develop individual values. Selznick and Broom elaborated on this point and coined the term “value-infusion” (Broom and Selznick 1955; Levitsky 1998). Huntington (1968) operationalized his concept through four dimensions: adaptability and flexibility; (organizational) complexity; autonomy and coherence. Adaptability implies—in excess of the capability of functional adjustment, e.g. regarding changing function logics of the political system—the durability of the organization, i.e. the aptitude to survive the first and founding generation of party leadership (Randall and Svåsand 2002, p. 10). Organizational complexity is measured by the number of subunits. Autonomy and coherence are interlinked in Huntington’s logic, even if they are separated in theory. The autonomy of an organization describes a structural independence and differentness from other social groups. Coherence on the other hand encompasses the competence of a party to present itself as one entity, i.e. to fabricate intraparty consensus and allow intraparty pluralism at the same time, without risking a demolition of the party organization. This can only work if party members understand methods of conflict resolution and compromise building, and have internalized them. Huntington’s concept was widely used in research on political change in general but also in party politics research.

Panebianco, who in his volume on *Political Parties: Organization and Power* focused on parties in established democracies 20 years later, defined his institutionalization concept as follows: The term depicts the mode and fashion in which an organization manifests itself. It is a process in which the organization sheds an instrumental character: “[...] it becomes valuable in and of itself, and its goals become inseparable and indistinguishable from it. In this way, its preservation and survival become a ‘goal’ for a great number of its supporters” (Panebianco 1988, p. 53). This results in the establishment of an incentive system inside of a party, to offer selective as well as collective appeals, which ultimately generate loyalty. To assess the degree of institutionalization of a given organization Panebianco offers a continuum between two points: On the one hand autonomy, i.e. the extent of control the party possesses vis á vis their base and external environment, and on the other hand the extent of its systemness. With systemness the author tries to capture the degree of independence of the different sectors or actors inside of the party (Panebianco 1988, p. 55). Panebianco stresses that both dimensions, autonomy and systemness, are correlated. In this respect, both Huntington and Panebianco specifically put organization-related attributes at the center of their concepts. Comparing both concepts we see the joint emphasis on the dimension autonomy. Panebianco’s definition of systemness combines Huntington’s dimensions of complexity and coherence. Only adaptability is not reflected in Panebianco’s logic. Instead, he assumes that a high degree of institutionalization reduces the adaptability and flexibility of an organization.

Steven Levitsky in his contribution *Institutionalization and Peronism: The Concept, the Case and the Case for Unpacking the Concept* let the theory travel to Latin America and points to a discrepancy in the original conception of institutionalization and its refinement. He therefore proposes a distinction between the external recognition of a party on the one hand and internal stability and routinization of processes. Pointing at the Argentinian Peronist party he argues that appraisal of a political party does not automatically imply a stable organizational structure or routinized behavior patterns inside of the party (Levitsky 1998). In his eyes, value-infusion and behavioral routinization have to be taken into account separately: “For Levitsky, value infusion occurs when a party, in Janda’s terms, ‘is reified in the public mind’ or in Huntington’s terms, is ‘valued for itself’ rather than its original purposes or goals. As an example, he offers evidence of the Peronist leaders and members remaining committed ‘through periods of severe diversity and despite important changes in the organization’s goals and strategies’ [...] including Peron’s death. As for routinization, he argues that prior literature recognizing only routinization into formal rules had been mistaken; routinization of informal patterns of behavior should count as well” (Harmel et al. 2018, p. 5).

Kenneth Janda also takes up the term value-infusion and extends the definition of institutionalization beyond internal organizational factors by including an external dimension. Following Panebianco—who argues that a party can only be institutionalized when it is more than an instrument in itself but rather has a distinct value for others—Janda assumes that an institutionalized party has a corresponding image in public awareness, meaning it is externally objectified. The apprehension of the party by the public or the society as well as its recognition through other relevant actors spurs the institutionalization of a party. Harmel and Svåsand (1989) build on this assumption in their volume *From Protest to Party: Progress on the Right in Denmark and Norway*. Randall and Svåsand transferred the underlying understanding of value-infusion to young democracies: “[...] involving the extent to which the party has become part of the ‘routines’ of other relevant actors in ways which suggest that they consider it to be an ‘established party’” (Randall and Svåsand 2002, p. 11). The party develops repetitive behavioral patterns in being “valued by those who identify with it” (Janda 1980, p. 19). Furthermore, Janda’s approach offers six additional indicators for analysis: founding year, name changes, organizational discontinuities (e.g. splits or mergers), competition for party leadership, legislative and electoral instability.

Richard Rose and Thomas Mackie brought forward a rather minimalistic approach for measuring party institutionalization in 1988. They see three factors as decisive for being judged to be an institutionalized party by public opinion. The party should be represented in all subunits of the state, giving the opportunity to take part in all elections in a country. The party should be able to nominate candidates for national elections (Rose and Mackie 1988). In this respect Rose and Mackie argue, a party is institutionalized if it contested at least three elections: “A group that fails to do this is not an established political party, but an ephemeral party” (Rose and Mackie 1988, p. 536).

More recent concepts pick up on the more classical approaches while at the same time adding new elements. Veugelers (1995) understands institutionalization

as a process combining systemic, chronological and spatial criteria. A party exhibits systemic relevance if it is needed for government formation or has blackmail potential. A party has chronological relevance if it exists without interruption and continuously puts forward candidates for elections. Spatial relevance means a party has penetrated the political and institutional setting and is represented in parliament through its candidates (Veugeliers 1995, p. 4). Pedahzur and Brichta, on the other hand, apply a two-track method. They follow the concept of institutionalization of Rose and Mackie in emphasizing persistence as a central factor. The longer a party takes part in elections, the more institutionalized it is. But this assessment stops short of looking at intraparty processes and offers no ground for comparison looking at new democracies. Therefore Pedahzur and Brichta, drawing on Janda, add elements of electoral and legislative stability (Pedahzur und Brichta 2016, p. 35).

Randall and Svåsand (2002) have been among the first scholars to make a distinction between the institutionalization of individual parties on the one hand, and of party systems on the other, and to reflect on the transfer of the concept to 'new' democracies although it was shaped by the mass party model of party organization initially developed in Western Europe. They criticized the transfer of Western European perspectives on party institutionalization processes to other world regions and young democracies, and refined the existing theories with regard to new democracies. For them "(...) the process through which they [political parties] become institutionalized is not identical with the party's development in purely organization terms. Rather [they] suggest that institutionalization should be understood as the process by which the party becomes established in terms both of integrated patterns of behaviour and of attitudes, or culture. [They] suggest further that it is helpful to distinguish between internal and externally related aspects of this process. Internal aspects refer to developments within the party itself; external aspects have to do with the party's relationship with the society in which it is embedded, including other institutions." (Randall and Svåsand 2002, p. 12). Randall and Svåsand 'take the four elements of systemness, value infusion, decisional autonomy, and reification as constituting the core of the process of party institutionalization, that is the process through which the party becomes established as an institution. But the authors also mention, that though 'institutionalization in terms of the four variables will increase the party's prospects for survival, it is certainly no guarantee against regression or de-institutionalization'. The definition of party institutionalization by Randall and Svåsand is theoretically discussed along the criteria of identification developed by Huntington (1968), Panebianco (1988), Levitsky (1998) and Kenneth Janda (1980). Using the common denominators Randall and Svåsand develop their own four-dimensional grid of party-institutionalization.

Basedau and Stroh (2008) brought this four-dimensional concept to Sub Saharan Africa when they developed an Index of the Institutionalization of Parties (IIP) along the lines of the abovementioned four criteria. Their motivation came from the observation, that a huge amount of area studies and transformation research emphasizes the importance of institutionalization of parties and party systems for democratic consolidation (e.g. Diamond 1989; Merkel 1997; Mainwaring 1998; Betz et al. 2004). Moreover they witnessed, that "political parties in Africa—as well as in most new democracies and democratizing countries in developing areas—are said

to be uniformly poorly institutionalized (Erdmann 1999, 2004), but this assertion has remained fairly undifferentiated and, above all, poorly supported empirically” (Basedau and Stroh 2008, p. 7). To face this assumption their index was tested on 28 parties from five countries of Anglophone Africa. Based on party institutionalization research, Basedau and Stroh have filtered out four major dimensions for the measurement of the degree of party institutionalization (level of organization, internal coherence, autonomy, roots in society).

Finally, Arter and Kestila-Kekkonen (2014) formulate a further multidimensional approach. The existence of a stable electoral base, or supporters, is a central element of their approach. What is more, the party rests on an organizational structure, which goes with a stable core of party members. The party promotes candidates for elections. Tasks and functions are dispersed inside the party, similar to the dimensions autonomy and systemness described by Panebianco. The party and its elected representatives function as a coherent actor in the political system, following the dimension of cohesion. They also add the dimension of adaptability as relevant factor (Arter and Kestila-Kekkonen 2014, p. 937 ff.). The authors emphasize that the single dimensions do not have to be developed uniformly. Institutionalization can differ regarding the electoral, the organizational and the legislative arenas (Arter and Kestila-Kekkonen 2014, p. 937 ff.).

3 Three dimensions of party institutionalization

Linking party institutionalization with different arenas comes along with the idea of different dimensions of party institutionalization processes. This idea—that the different dimensions of institutionalization may develop independently from each other—is important in the work of Harmel et al. (2018), too. They develop three types of party institutionalization, “distinguished by ‘role’ more so than venue: (1) as internal behaviour indicative of reification of the party aside from its founding leaders and their initial goals (‘internal’ or ‘organisational’ institutionalisation), as demonstrated in routinized organisational behaviour and non-personalisation of internal party loyalty (i.e. value infusion); (2) as the perception, and consequent behaviour, by other actors that the party has ‘lasting power’ (‘external’ or ‘perceptual’ institutionalisation); and (3) as an objectively established survival record, i.e. objective durability (‘objective’ institutionalisation)” (2018, p. 8 f.).

This threefold definition can be identified as conceptual core of the party institutionalization concept: objective, internal and external aspects. These three elements are currently discussed in the context of the institutionalization of political parties in ‘young’ and ‘established’ democracies (Janda 1980; Panebianco 1988; Kuenzi and Lambright 2001; Randall and Svåsand 2002; Biezen 2005; Bolleyer 2013; Arter and Kestilae-Kekkonen 2014; Luna 2014; Arter 2016; Harmel et al. 2018; Bolleyer and Ruth 2018; Harmel and Svåsand 2019; Lefkofridi and Weissenbach 2016, 2019) and they shape the definition of our understanding, too.

Objective aspects comprise indicators such as the formal age of the party (in terms of survivability of a party), the number of members, the electoral success, and parliamentary strength. Objective institutionalization addresses a more formal

survival and/or power record (e.g. Harmel and Svåsand 2019). Referring to Harmel et al. (2018, p. 8f.), objective institutionalization addresses “a record of durability that includes both persistence and ability to survive shocks”.

Internal party aspects include internal organizational behavior and attitudes, material and human resources, the routinization of decision-making processes and value infusion. The internal aspects address party-internal behavior, and internal or organizational institutionalization means a process of routinization that enables parties’ to decouple from its founding leaders and their initial goals, as demonstrated in routinized organizational behavior and non-personalization of internal party loyalty (i.e. value infusion). Therewith, internal institutionalization addresses the “evidence of ability to adjust to changing goals and purposes for the party as well as routinization of decision making processes, including but not limited to leadership selection, in ways which suggest that the party can have a ‘life of its own’ beyond the political lives and goals of its current leader(s)” (Harmel et al. 2018, p. 8f.).

External party aspects consider primarily factors of the party’s relationship with the society as well as with other institutions—e.g. perception as a relevant actor by third parties, as well as societal embeddedness and trust in a political party. Consequently, the perception by other actors that the party has ‘lasting power’ is the core idea of the external or perceptual aspect of party institutionalization.² Related with this external perception of an institutionalized party, it includes, “evidence that the party has become part of the ‘routines’ of other relevant actors in ways which suggest that they consider it to be an ‘established party’” (Harmel et al. 2018, p. 8f.).

Distinguishing between these three dimensions is the first crucial step towards a concept of party institutionalization that can travel the world. In addition to this, we understand institutionalization as a process in different sequences by which the development of (new) parties can be subjected to stagnation and setbacks. In our understanding, a party on its way to an institution has to undergo different stages: From the party building and the stage of declaration (Pedersen 1982, p. 6) to an objective, organizational institutionalization stage and farther to the external, perceptual institutionalization. The final stage marks an internally institutionalized party that has reached the status that we call ‘institution-hood’.

There is nonetheless disagreement in the literature about the process character, the duration of the process and about a possible final stage of the institutionalization of individual parties (Pedersen 1982, 1991). One group of scholars follow a ‘minimal’ and ‘static’ understanding, referring only to external institutionalization as they define parties as institutionalized when outside observers (e.g. other parties, electorate) perceive them as such (Rose and Mackie 1988). More prominent is a second group, sharing a multi-dimensional starting point, from which differing concepts are derived (Panebianco 1988; Harmel and Svåsand 1993; Levitsky 2001; Randall and Svåsand 2002; Poguntke 2002; Köllner et al. 2006; Basedau and Stroh 2008; Weissenbach 2010a, 2010b, 2016; Bolleyer 2013; Lefkofridi and Weissenbach 2016, 2019). This implies a process-related perspective on party institutionalization (e.g. different sequences, differing speed, stagnation or setbacks).

² This is essentially the same concept as what Randall and Svåsand (2002) call ‘reification.’

Furthermore, in our definition the institutionalization of political parties is possible irrespective of the age the democracy in which it occurs—just as political parties institutionalize in young democracies, new political parties in established democracies experience similar processes. Moreover it is irrespective of the institutionalization of the entire party system. Although there are fruitful studies on party system institutionalization in young and in established democracies (Kuenzi and Lambright 2001; Casal-Bértoa 2017) and even though the two concepts may overlap and may be theoretically linked: We are focusing on the institutionalization of individual parties and we understand party institutionalization as a complex, multi-dimensional and sequential process.

4 Bridging the gap: Different worlds of party institutionalization

There are several questions linked to the institutionalization of individual parties: Which factors and processes allow a political party to grow into an institutionalized player (Tavits 2013)? What role do contextual and systemic factors like the transitional status, the multi-level system, the electoral system, party financing as well as party funding and assistance play in the institutionalization of political parties (e.g. Diamond 1989; Bosco and Morlino 2007; Scarrow 2007; Burnell and Gerrits 2010; Weissenbach 2010a, 2013, 2016)? What role do inter- or supranational organizations play in the institutionalization of political parties? How does leadership affect party institutionalization (Harmel and Svåsand 1993; Arter 2016)? What role does the organization of a party play in the institutionalization process (Beller and Belloni 1978; Panebianco 1988; Sartori 2005; Bukow 2013)? And how does a party's origin influence its institutionalization process (Bolleyer and Bytzeck 2017; Arter 2016; Weissenbach 2019; Lefkofridi and Weissenbach 2019)? These questions, among others, that have been discussed in party institutionalization and party change literature, have influenced the contributions in this special issue. The articles bridge the gap between party institutionalization research in different areas of the world. They demonstrate that the three-dimensional understanding of party institutionalization is applicable for different types of parties in both, established and young democracies in Western Europe, Eastern and Central Europe, Australia and Latin America.

Bolleyer and Ruth-Lovell focus on elite-level and base-level routinization and apply their theoretical refinement in comparative case studies in new and established democracies (PRSD in Chile, Australian Greens, Peronist Party in Argentina, Danish Peoples Party). *Mader and Steiner* take the internal institutionalization as an independent variable in, first, a case study of the AfD in Germany and, secondly, a comparative analysis of parties from 19 democracies. They demonstrate the applicability of the concept in different units of analysis and to a range of parties and party types. *Musella and Vercesi* develop an index for the comparative analysis of the institutionalization of personal parties, which they apply to the Italian Five Star Movement (5SM). *Barberà and Barrio* reflect on the multi-level nature of many Western democracies and introduce a theoretical framework combining internal and external aspects of institutionalization. They illustrate their theoretical assumptions through a comparative analysis of the founding phase of two current newcomers, the

Spanish Podemos and Ciudadanos. *Kwiatkowska* explores how programmatic and organizational decisions in the very beginning of a party's lifetime may influence its institutionalization process by comparing the Green Party in Poland with other Green parties in Eastern and Central Europe. *Vukovic* provides a detailed comparison of the developmental trajectories of the ruling parties in Serbia (Socialist Party of Serbia) and Croatia (Croatian Democratic Union) in the 1990s. The contribution by *Kestler, Lucca and Krause* leads us to Latin America and the cases of the Brazilian Workers' Party (PT), the Uruguayan Broad Front (FA), the Argentine FREPASO and the Venezuelan Causa R.

Beside this broad variety of regional and comparative area studies all articles adopted the understanding of party institutionalization as a multi-dimensional and sequential process that includes internal and external aspects, most of them referring to value-infusion and routinization as important indicators of an internally institutionalized party. As described in the following, the authors emphasize the dimensions of institutionalization differently and develop indicators appropriate to the variety of contexts.

Panebianco (1988) emphasizes that the level of institutionalization of a party is significantly dependent on how a party was established, on the factors of the party's "genetic model" (Panebianco 1988, p. 50), or, in other words, how 'party-building' developed. He argues that the greater "the extent to which the party has been constructed through a process of 'penetration' from the centre to the periphery (understood both in territorial and more organizational terms)" (Randall and Svåsand 2002, p. 17), the better the party will be institutionalized. Even the element of 'diffusion', "in which the party emerged more diffusely out of 'spontaneous germination' from below" (Randall and Svåsand 2002, p. 17), will, at least in Panebianco's thought, contribute towards party-building. Randall and Svåsand, on the other hand, criticise that this combination of "penetration" and "diffusion" (Randall and Svåsand 2002, p. 17) is unrealistic when applied to 'third-world-regions' as this combination mainly reflects European experience in party-building. Inconsistency in the process of party creation and institutionalization in developing countries is regarded as one of the main reasons: "In some cases, parties in the present wave of democratization have had a headstart where they can build on institutional foundations laid in an earlier period. (...) But in many of the new democracies, general party development has been regularly interrupted" (Randall and Svåsand 2002, p. 17f.). Additionally, access to resources and financing possibilities for party creation in transitional states is diametrically opposite to conditions of parties in developed countries. It tends to be impossible for parties in developing countries to attain sufficient funding for party building solely out of membership contributions. In order to sustain a political role in a competitive national party environment, most parties in transitional states are heavily dependent on external funding (Weissenbach 2010a, 2016).

Barrio's and Barberà's article in this issue reflects on the organizational formation by penetration and diffusion and introduces a theoretical framework that builds on both, a party's origin and internal factors of party institutionalization as well as external factors (e.g. cross-level contamination, electoral threshold).

Furthermore, the internal systemness of a party is influenced by the relationship between party and party leadership. This is an aspect in the article of *Bolleyer and*

Ruth-Lovell who aim to add to the refinement of the concept of party institutionalization by focusing on the internal multilevel character of a party and by questioning whose behavior we actually theorize when specifying and operationalizing the concept's various dimensions. Therefore they carefully distinguish the behavior of the party elite and the party base when they analyze rule-guided behavior (routinization) of party actors within a party organization. The internal factor of leadership and personalization has always been interrelated with the party institutionalization concept—the contribution by *Vukovic* as well as the article by *Musella and Vercesi* builds on this strand of research and focuses on the relationship of party personalization and party institutionalization in Serbia and Croatia (*Vukovic*) respectively in Italy (*Musella and Vercesi*). *Vukovic* shows that, albeit different origins (communist-successor vs. anti-establishment party), the political parties ended up with a very similar internal organization because of power personalization, which hindered the process of their institutionalization and determined the course of their political development. On the contrary, *Musella and Vercesi* assess personalization not necessarily as hindering for the institutionalization process. In fact they find, that even personalistic parties show varying degrees of institutionalization.

In his seminal discussion of characteristics of party creation, *Panebianco* (1988, p. 53) emphasizes the role of “charisma” of a single prominent party leader. In early phases of ‘party-building’ a charismatic leader might play a useful role. However, in the long run a charismatic leader will exert a negative effect on party institutionalization. These parties “pass like a meteor over the political firmament, which spring up and die out without ever institutionalizing. Institutionalization entails a ‘routinization of charisma’, a transfer of authority from the leader to the party, and very few charismatic parties survive this transfer” (*Panebianco* 1988, p. 53). Transferring these findings to third-world regions and states in transition is of high relevance, as here parties are regularly criticized as being merely instrumentalized by single leaders in order to attain personal goals (*Hicken* 2006). This finding is reflected in the articles of *Kestler, Lucca and Krause* as well as *Bolleyer and Ruth*. *Kestler et al.* emphasizes an understanding of party institutionalization as a process by applying a sequential model. They tell the story of the development of four new parties that have been formed from scratch and developed in similar institutional contexts—with a maximum variation in the outcome regarding their successful or failed institutionalization.

According to *Randall and Svåsand* (2002), the internal ‘attitudinal dimension’ within a party, which they term ‘value infusion’ is strongest when a party emerges along a specific societal cleavage, when it is closely tied to a social movement and when it is deeply rooted within society. They refer to the classic European mass-based parties defined by *Duverger* (1954), which are closely tied to a single socio-economic class, or the concept of the ‘catch-all-party’ by *Kirchheimer* (1966). *Lipset and Rokkan* (1967) explain the connection between social cleavages and party formation with their classical cleavage theory: “For *Lipset and Rokkan* (1967), the contests between political machines in Europe are much more than just a competition for the economic or status entitlements that emanate from political power because they were founded on lasting divisions. The contest between the political was a struggle between different value commitments, of different ‘conceptions of

moral right and interpretations of history and human destiny' (1967, p. 11). The contention among parties about agriculture and industry was not just about who gets what post, but about, which way of life is best (1967, p. 19). Cleavage politics meant that members voted for the parties because they shared their interests and platforms" (Manasca and Tan 2005, p. 750). Applied to other world regions, those rather traditional European theoretical models appear to be questionable—especially because the classical cleavages identified by Lipset and Rokkan, such as capital vs. worker, are often transcended by other conflicts such as ethnical cleavages (Manasca and Tan 2005).

Randall and Svåsand's definition portrays the autonomy of a party as a third criterion for party institutionalization. The term "autonomy" signifies a party's autonomy from external actors. *Kwiatkowska* includes this understanding of external autonomy in her analysis and focuses on the impact internal decisions regarding the political program during the early party formation stage had on its external institutionalization. She finds that Green parties in Central and Eastern Europe who merged "environmentalist ideas with social conservatism and pro-market stance, had a chance to survive in the long-term", whereas Green parties implementing an ideological model of Western Europe Green parties (combining social economic policies with a liberal socio-cultural stance) failed in the institutionalization process. Nevertheless the external support by the European Green Party (EGP) served as external source of legitimacy for those parties and secured them a certain level of relevance in the perception of the other parties.

Panebianco regards dependence on external contributors as one of the main sources for weak party institutionalization, because the legitimization of the party's leadership and party's organizational loyalties are situated outside the party structures: "[...] (1) the party's organizational loyalties will be indirect loyalties, loyalties primarily to the external institution, and only secondarily to the party; (2) the external institution is, consequently, the leadership's source of legitimation, and this can tip the balance from one side to the other in the internal power struggle" (Panebianco 1988, p. 51 f.). However, he also states that a certain kind of international support can—de facto—have a positive impact on internal party development: "There exist a number of transnational party organizations, set up along ideological lines, that function as support organizations for new parties in multiparty systems. While this may give international actors influence in the national development of a party system, this type of influence can nevertheless assist individual party institutionalization" (Randall and Svåsand 2002, p. 23).

According to Randall and Svåsand the final dimension of party institutionalization in transition states is 'party reification'. This aspect describes the degree to which a party can make itself memorable amongst the electorate of the given state—it also accounts for the resulting behavior of its political actors. Harmel et al. (2018) and Harmel and Svåsand (2019) call this 'external' or 'perceptual' institutionalization. This ability is mainly determined by the historic roots of a party in society, but also by the symbolic values a party represents, the strength of party organization and party access to mass media. The extent to which party leadership is able to institutionalize a certain set of core party values, a political program and a comprehensive ideological base within the party organization is decisive: "This explains the crucial role that

ideology normally plays in shaping the newly-formed organization, in determining its collective identity. (...) Institutionalization is, in fact, the process by which an organization incorporates its founders' values and aims" (Panebianco 1988, p. 53). Both, value-infusion and routinization as indicators of party institutionalization are crucial factors for *Mader and Steiner*, when they investigate the relation between party institutionalization and intra-party preference homogeneity in democracies. They explore this interaction at the level of candidates to the national legislature. Based on survey data they focus first on the case of the young and comparatively weakly institutionalized Alternative for Germany (AfD) and compare it with the established German parties. In a second step they investigate this link between party institutionalization and preference homogeneity in a cross-country analysis of 19 mostly established democracies.

5 Conclusion

While this issue certainly is not the only attempt to track the institutionalization process of political parties our intention was to contribute to the definition of clearer boundaries of the concept and to a unified language to talk about party institutionalization worldwide. In this collective project it was our primary contention that the building of concepts and theory on the institutionalization of political parties can be enhanced by bringing together research on party institutionalization and party change in different world regions (i.e. areas) and by recognizing that it is a dynamic multi-dimensional process that consists of different sequences, rather than a fixed status.

The articles in this special issue demonstrate that the three-dimensional (objective, internal and external) understanding of party institutionalization is applicable for different types of parties in established and in young democracies and that we can use it for the comparative and trans-regional analysis of party institutionalization worldwide. Given the range of cases and areas in our articles we learned, that on the way to 'institution-hood' not all parties under investigation developed equally in all three dimensions—leaving us with the question for further research which dimension or sequence matters most for the institutionalization of a political party.

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