

REFLECTIONS ON REGIME CHANGE AND DEMOCRACY IN BAHIA, BRAZIL

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Abstract: A significant shortcoming in Latin American transitions to democracy has been the failure of some subnational units to follow suit, leading to the emergence of authoritarian enclaves. Recently, however, some of these nondemocratic regimes have moved toward a political opening. In this respect, the state of Bahia in Northeastern Brazil is intriguing. Antônio Carlos Magalhães and his associates, known as carlistas, were in office between 1970 and 2006, when Jaques Wagner, from the Worker's Party (PT), won the gubernatorial election. While the ascent of the PT was saluted as spearheading Bahia's democratization, numerous observers have signaled important elements of continuity, including personalism, clientelism, and top-down decision making. What changed and what didn't is thus a pertinent question. To answer it, I use Robert Dahl's procedural definition of democracy (completed and updated by more recent scholarship) as the guiding criterion to compare carlista and PT rule in Bahia. I conclude with a broad reflection on subnational democratization in Latin America.

As many studies have shown, a significant shortcoming in Latin American federal countries' transitions to democracy has been the failure of some subnational states to follow suit, thus leading to the emergence of authoritarian enclaves (see JPLA 2010). In recent years, however, some of these nondemocratic regimes have also moved in the direction of a political opening, thus raising questions about the nature and direction of subnational regime change in Latin America.

In this respect, the state of Bahia in Northeastern Brazil, the country's quintessential authoritarian enclave, is intriguing. The local boss, Antônio Carlos Magalhães—ACM, as he was popularly known—was first appointed governor of Bahia by the military regime in 1970 and again in 1978. At other times, his close associates, known as *carlistas*, were in office.

After Brazil's transition to democracy in 1985, Bahia experienced a four-year interlude (1986–1990) during which ACM's opponents were in power. Nevertheless, ACM was elected governor of Bahia in 1990 and, until 2006, all successive governors would be carlistas. While eschewing open violence, *carlismo* used all resources at hand—from clientelism to electoral manipulation to selective repression—to consolidate its hold on subnational power (Souza 1997; Dantas Neto 2006).

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In 2006, Jaques Wagner, from the left-wing Worker's Party (Partido dos Trabalhadores, PT), won the gubernatorial election. He was subsequently reelected in 2010, thereby durably supplanting carlismo as Bahia's dominant political force. While the ascent of the PT was saluted as spearheading Bahia's long-awaited democratization, numerous actors and observers—from politicians to social organizers to academics—have signaled important elements of continuity between carlismo and PT rule, including continued reliance on personalism and clientelism, machine politics, and top-down decision making, despite important differences in political priorities and style.¹

What changed and what didn't in subnational democratization is thus a pertinent question. In an attempt to answer it, I use Robert Dahl's well-known procedural definition of democracy (completed and updated by more recent scholarship) as the guiding criterion in comparing carlista and PT rule in Bahia. The empirical dimension of this research is based on an extensive survey of the literature as well as on field research conducted in Bahia in 2011. Together, the theoretical questions and the empirical analysis offer important insights on Latin American democratization and raise concrete questions for further research.

In the following section, I discuss the procedural conception of democracy as well as my single-case historical comparison. I then use these criteria to study Bahia before and after the PT's arrival to power. In the final sections I attempt to explain change and continuity in Bahia and to reflect on subnational democratization more broadly.

A PROCEDURAL DEFINITION OF DEMOCRACY

Democracy has always been an elusive concept, in Latin America and elsewhere, and even more so at the subnational level (*JPLA* 2010). Empirical reality has led to the use of numerous qualifiers, leading to the emergence of what some scholars have called "democracy with adjectives" (Collier and Levitsky 1997). As a result, an important literature on the nature of democracy in Latin America has emerged (Agüero and Stark 1998; Diamond et al. 1999; O'Donnell 2001; Gibson 2004; and Montero and Samuels 2004, among others).

In this article, I propose to use the original definition of procedural democracy as a set of research criteria to assess the nature of a given political regime. By probing the way citizens formulate and signify their political preferences and how these are weighed in the conduct of government (Dahl 1971), we can have a general view of the nature of state-society interaction and of the political mobilization channels available in a given regime. If we study the same political system in two different moments in time, we can evaluate the impact of a particular event—in this case, democratization—in comparative perspective (Sabetti 2000).

Three major dimensions can be identified in Dahl's argument: electoral competition, effective civil and political rights, and open state-society relations.

1. Dantas Neto 2009; Rosemberg Pinto, state legislator (PT), interview with the author, Salvador, August 3, 2011; Fabya Reis, member of Movimento dos Trabalhadores Rurais sem Terra, Bahia, interview with the author, Salvador, August 9, 2011.

Two major elements have been subsequently added: the question of rule of law (O'Donnell 2001) and the presence or absence of reserved domains of power, also known as authoritarian enclaves (Garretón 1989; Diamond et al. 1999).

In the context of a subnational transition, elections are not a useful analytic tool, since federal pressures force subnational states and their authoritarian elites to adopt and sustain at least minimum standards of electoral competition, including universal suffrage, broad formal eligibility for public office, and even relatively free and fair elections (Gervasoni 2005). In Bahia, the opposition's electoral victories in 1986 and 2006, together with the significant rise in electoral competition in the late 1990s (Dantas Neto 2009; Borges 2010; TRE-BA 2010), prove this point.

In terms of civil and political rights, I assess three criteria: the extent to which associative autonomy exists, rule of law, and the existence of alternative sources of information (Dahl 1971; O'Donnell 2001). Since freedom of organization is guaranteed by the post-transition federal Constitution and upheld by current Brazilian political culture (Kingstone and Power 2008), it became hard for the Bahian government to repress subnational organizations. Nevertheless, an authoritarian regime can attempt to limit their autonomy and place its own priorities over those of the social movements.

In the Brazilian federation, subnational states have their own judiciary systems, side by side with the federal one (Durazo Herrmann 2009). Through the targeted appointment of subnational judges, aimed at blocking judicial contestation of governmental decisions, a subnational authoritarian elite can have a significant impact on the extent to which rule of law actually exists in its territory. Moreover, as a result of Brazil's coalition presidentialism, local elites with federal clout have an important say in the appointment of federal judges in their jurisdiction (Souza 1997; Arretche 2007), further limiting the prospects of effective rule of law.

Beyond simple freedom of expression, increasingly (albeit not unproblematically) guaranteed and enforced in most Latin American polities, access to alternative sources of information is increasingly considered as a critical dimension, allowing individuals and groups to identify their interests, evaluate their environment, and weigh the chances of effectively pressing their issues (Dahl 1971; Wolton 1998). A subnational authoritarian elite can use its power to combine public broadcasting and private media ownership to substantially limit the availability of information in its territory.

From the perspective of state-society relations, two research criteria emerge: the presence of reserved domains of power and the existence of decision-making institutions dependent on votes and other expressions of preference. While subnational authoritarian enclaves are a territorial form of a reserved domain of power, the nature and the extent to which certain policy arenas are withheld from public debate and open contestation vary with the strength and willfulness of the subnational authoritarian elite (Garretón 1989; Durazo Herrmann 2010).

Both academics and politicians agree that all subnational elites must respond, at least to some degree, to electoral preferences (Magalhães 1995; Behrend 2011). Moreover, under presidentialism, such as it exists in Brazil and its subnational states, this function is constitutionally vested in the legislature, as part of the

regime's system of checks and balances (cf. Hamilton, Madison, and Jay [1788] 1961). However, if an authoritarian elite consistently holds the majority in the sub-national legislature, it can effectively block all forms of legislative oversight and doom all attempts at demanding significant responsiveness and accountability from the state executive (Durazo Herrmann 2010).

Together, these research criteria provide a general overview of the nature of a political system at any given point in time and consequently allow us to compare two different stages of its evolution. On this basis, it is possible to assess the effects of democratization on Bahia's political system.

BAHIA UNDER CARLISMO

From colonial times until the mid-twentieth century, Bahia was governed by a landholding elite that exerted patrimonial domination over the state and its inhabitants. With a stagnant economy based on extensive cash-crop agriculture (mostly sugar and tobacco), Bahia became a traditional society with little upward mobility or political initiative (Oliveira 1987; Risério 2004).

After the 1964 coup d'état, the Brazilian military regime sought to reduce its dependence on regional elites by promoting profound economic changes. In Bahia, this led to the appointment of ACM as governor in 1970. ACM rapidly enacted a profound authoritarian modernization process in which rapid economic transformation combined with strict control (or outright repression) of political contestation (Dantas Neto 2006).

Established political practices, however, proved resilient and renovated themselves under military rule. As a result, vertical political mediation continued, despite the appearance of substantive new social groups, including industrial entrepreneurs and blue-collar workers (Hagopian 1996; Brito 2008).

Social autonomy

Despite a rather stifled political environment, social organizations in Bahia always had powerful mobilization dynamics. In most cases, however, the influence these organizations had on politics was indirect or diffuse. While the parties on the left were open to their demands, associating too closely with the opposition was a dangerous course for social organizations making material demands on the state. Therefore, social movements under carlismo remained largely isolated, apolitical, and dependent on government largesse (Baiocchi and Corrado 2007).

Despite a militant discourse, most social organizations in Bahia entertained an ambiguous relationship of rhetorical conflict with and material dependence on the subnational government (Hanchard 1998; Baiocchi and Corrado 2007). Moreover, since Bahia's numerous organizations usually engage directly with the subnational government on a one-to-one basis, they are vulnerable to its clientelistic practices. Consequently, clientelism became the main government-society interaction channel, thereby renewing Bahia's traditional social verticalism. The paternalistic material and symbolic relationships that ACM entertained with many

terreiros—the sacred houses of Afro-Brazilian religions—are characteristic in this respect (Goldman 2006; Baiocchi and Corrado 2007; Souza Júnior 2007).

The relatively limited weight of the state capital, Salvador, in both demographic and political terms, together with the strong proportion in Bahia of rural and marginal population, contributed to the success of patronage and clientelism by allowing for the emergence of machine politics. In the wake of federal regime change, these practices became important tools in controlling the subnational opening (Milani 2006; Borges 2010).

Beyond the material dimension of clientelism, carlismo resorted to powerful symbolic measures. Besides his personal charisma and direct dealings with numerous organizations, ACM successfully identified his own regime with *baianidade*—a conception of regional identity based as much on a partial historical account and the revival of local cuisine as on sexual and racial stereotypes (Pinho 1998; Dantas Neto 2009). ACM was thus able to assemble and hold together a broad, apparently incongruous coalition, ranging from industrial entrepreneurs in the larger urban centers to traditional municipal bosses in the interior, while depicting oppositionist critiques as unfounded, foreign-based attacks on Bahia itself (Dantas Neto 2006; Mota 2007; Sousa Júnior 2007).

In yet another demobilizing mechanism, Bahia's political culture considers electoral campaigns as providing the only legitimate moment to participate in open politics and generally frowns upon permanent political engagement. Consequently, social organizations tend to subordinate their demands to political parties—the only actors legally entitled to compete in elections—and their agendas as a way of guaranteeing their access to government resources (Goldman 2006; Palmeira 2006).

Nevertheless, some social groups, supported by the PT and some elements of the Catholic Church, became more openly involved in politics. One of their greatest successes was the adoption of Bahia's first antiracism program. However, its enforcement mechanisms were weak and the law was soon ignored.²

As the federal transition advanced, clientelistic practices evolved in Bahia. Following the constitutional mandate and the example of Porto Alegre in the southern state of Rio Grande do Sul, a large number of participatory councils were established. These councils' decisions, however, are consultative rather than binding and, despite generating some interest, failed to transform associational life in Bahia (Goldman 2006; Mota 2007).

Yet the adoption of formal democratic procedures contributed to the gradual growth of the opposition in Bahia. Traditional long-term clientelistic relationships deteriorated, making it possible to vote for alternative parties. A race to the top began, with competing candidates looking to secure short-term alliances with various social organizations by offering them better access to governmental largesse. As a result, machine politics broke down, and the opposition's competitiveness increased (Barreira 2006; Borges 2010, 2011).

2. Raymundo dos Santos Bujão, black movement activist, interview with the author, Salvador, August 10, 2011; Aldemira Senna, vice president of the PT-Bahia, interview with the author, Salvador, August 3, 2011.

In order to succeed, the opposition needed to wean as many social organizations as possible from carlismo and therefore benefited greatly from the scandals involving ACM and his associates in the early 2000s.³ Social organizations subsequently played a critical role in creating an opposition coalition capable of defeating the subnational authoritarian enclave, as they mobilized voters and represented the coalition in the large areas, both urban and rural, where political parties are absent (Dantas Neto 2003; Palmeira 2006).

Trade unions are another important element of associational life in Bahia. Their relationship with carlismo, however, was ambiguous, as most of the workers were either public employees in public administration or state corporations, or their jobs depended on ACM's economic modernization policies. As a result, union life was marked by profound divisions. Nevertheless, some unions, such as those of the national oil company (Petrobrás) and the state water and sewage system, were openly critical of carlismo. They participated in the creation of the PT in 1980 and provided it with qualified leaders and a permanent presence outside the state capital. On the other hand, informal sector organizations, dependent on official goodwill for their workplaces and practices, were unwilling to confront ACM (Carvalho 2010; Pinto interview).

Brazil's landless peasant movement (Movimento dos Trabalhadores Rurais sem Terra, MST) also made strides in Bahia in the late 1980s. However, its growth was slow and difficult and concentrated in a few regions of the state. The MST was a constant target for state police repression and for *capanga* (private militia) violence, which resulted in numerous illegal evictions.⁴

Consequently, the landholding oligarchy was one of carlismo's less organized but nonetheless significant sources of political support. While its economic significance declined with ACM's authoritarian modernization, it remained politically powerful as it controlled Bahia's numerous interior municipalities. Deprived of alternatives, it provided carlismo with a critical mediation channel in the more isolated but densely populated interior areas of the state (Dantas Neto 2006; Brito 2008).

On the business side, ACM and his successors enjoyed a close relationship with both individuals and associations, although they were not exempt from conflict or criticism, especially when the government's urban development projects led to unilateral expropriations. However, in the public sphere, business associations consistently supported carlismo's economic projects (ACB 1991).

Rule of law

Brazilian states have their own judiciaries, with locally appointed judges adjudicating matters of subnational jurisdiction. While in principle judges are nomi-

3. In 2000, a scandal erupted in which ACM was accused of conducting extensive political espionage against his opponents in the federal Senate. Rather than face impeachment, ACM resigned in 2001. As a result, his political image was severely damaged at both the federal and the subnational levels, although he still managed to be reelected senator for Bahia in 2002 (Echeverria 2011).

4. Reis 2008; Rosa Oliveira, state coordinator of the MST-Bahia, interview with the author, Salvador, August 4, 2011.

nated by the state governor and confirmed by the state legislature, executive dominance meant that the Legislative Assembly did little more than rubber-stamp the executive's choices.

More broadly, Brazil's judiciary has been characterized as a patrimonial system in which some social classes can privately influence judiciary decisions while the vast majority of the population is essentially excluded from the provision of justice (Botelho Junqueira 1992). As a result, the general perception in Bahia was that carlistas "owned" and benefited exclusively from the state judiciary.⁵

ACM also wielded significant informal influence over the federal judiciary network in Bahia, including both civil judges and the electoral court. While judicial nominations were formally a presidential prerogative to be confirmed by the federal Congress, ACM nominated most federal judges acting in Bahia in return for his alliance with the president, be it José Sarney (1985–1990) or Fernando Henrique Cardoso (1995–2000).⁶ As a result, the judiciary rarely overturned executive decisions. The electoral court was especially notorious for consistently rejecting malpractice accusations against carlistas (Dantas Neto 2009).

Media concentration

Under carlismo, media concentration increased significantly. ACM himself became owner of one of Bahia's largest dailies, the *Correio da Bahia* (later renamed simply *Correio*), which became the basis for the creation of an extensive media empire, Rede Bahia, including fifteen TV and radio stations throughout Bahia. Furthermore, ACM maneuvered to oust the incumbent license holder and, through Rede Bahia, to become Rede Globo's (Brazil's largest media empire) sole distributor and representative in Bahia and in Brazil's Northeast more generally (Magalhães 1995; Echeverria 2011).

As federal minister of communications (1985–1990), ACM never hid the political reasoning behind his decisions to grant or withhold broadcasting licenses. He argued that local stations in small interior towns were not economically viable and therefore only attracted political bidders, willing to accept economic losses for political advantage. Wherever there was competition, ACM systematically favored his supporters. As a result, ACM and his associates obtained almost all of Bahia's radio and TV concessions given between 1985 and 2000 (Magalhães 1995).

Moreover, independent Bahian media also faced informal censorship, mostly in the form of withheld publicity contracts. ACM publicly declared that, as governor, he was not obliged to grant a living to those who attacked him (Magalhães 1995). Of the few independent media channels that existed in Bahia, most were in print and had very limited circulation (Mott 2011). As a result, opposition groups had very limited media outlets (Bujão, interview; Oliveira, interview).

5. Marcelino Galo, state legislator (PT), interview with the author, Salvador, August 3, 2011.

6. In 1998, Fernando Henrique Cardoso of the Partido da Social-Democracia Brasileira (PSDB) was reelected for a second term (1999–2002), but his alliance with ACM, increasingly costly because of carlismo's authoritarianism, broke down over the Senate's espionage scandal.

Authoritarian enclaves

Formally, as a result of Brazil's transition, Bahia was a democratic regime. Its first direct, competitive elections to the state governorship were held in 1982, as in the rest of Brazil. In 1986, Bahia elected a non-carlista, Waldir Pires of the PMDB,⁷ as governor, only to return ACM to power in 1990. In the wake of Brazil's new democratic constitution in 1988, Bahia adopted its own in 1989. Thus, in theory, most subjects were open to public debate and contestation.

Nevertheless, Bahia was regarded as a subnational authoritarian enclave. Beyond the survival and consolidation of carlismo under the new regime, Bahia's political system was structured so as to limit participation, present carlistas as the state's exclusive political intermediaries, and promote a single political project. During Pires's interlude, his fragile coalition, his lack of legislative majority and the absence of *governismo*⁸ led to his government's breakdown (Dantas Neto 2003; Galo 2007). Open opposition was only tolerated when necessary, and subtle repression, ranging from informal censorship to selective police intervention to co-optation of autonomous social organizations, was used systematically (Souza 1997; Dantas Neto 2006).

The 1988 federal constitution reserved legislation over police matters to the federation but made the state governor the supreme commander of the state's police forces, both civil and military. Consequently, the police were subordinated to civilian authority, but the latter could make political use of police action (articles 22 and 144 of the Constituição do Brasil, 1988). The blanket amnesty granted by the military regime and confirmed by the new Constitution (article 42) also benefited the subnational military police forces.

Traditionally, the state military police was the subnational government's prime instrument of repression. The violent repression of the 1981 and 2001 military police strikes in Bahia—when the army was called in to break the strikes by force—contributed to the depoliticization of the Bahian police force and its subordination to civilian authority but also reinforced its nature as the repressive instrument of the state. Furthermore, the Bahian police hung on to its military hierarchy and antiguerrilla training rather than uphold day-to-day policing and subordination to civilian authorities (Paes-Machado and Albuquerque 2002; Georgecochama 2008; José 2012).

Legislative independence

From an electoral perspective, ACM's party, the PFL,⁹ never won a majority on its own, but its permanent alliance with two smaller parties—the PPB and the

7. The Party of the Brazilian Democratic Movement (Partido do Movimento Democrático Brasileiro, PMDB), had been Brazil's only legal opposition party during most of the military regime and embodied the country's struggle for democratization. In 1986, in the wake of the initial success of Sarney's government, the PMDB won twenty-two out of twenty-three Brazilian state governorships (Rouquié 2006).

8. *Governismo*, at the subnational level, is the trend to establish close political alliances with the incumbent governor in order to better benefit from his largesse. It is a way of strengthening the government's political base, both in the legislature and among municipalities (Abrucio 1998).

9. The Liberal Front Party (Partido da Frente Liberal, PFL) was formed in 1984 by northeastern politicians previously associated with the military regime but anxious to develop an independent base in

PTB¹⁰—guaranteed it a stranglehold on the state executive and legislature and on most of the state’s municipalities (if not the capital). Carlismo’s alliance with the federal government—first with Sarney, then with Cardoso—secured it significant influence at the federal level and substantial federal tolerance for its authoritarian practices. As a result, the subnational political system was almost completely closed. Through the use of patronage and *governismo*, carlistas captured almost two-thirds of the subnational legislative seats in 2002, even though they won less than 50 percent of the vote.¹¹

While carlista legislators were deprived of political initiative, the opposition was muzzled by procedural rules: only the governor can initiate spending bills. The opposition could only propose minor administrative bills, which were frequently blocked by the carlista majority. Some of the PT’s initiatives, however, were later reintroduced by the carlistas, usually with the governor’s support (Carvalho 2010).

In Bahia’s Legislative Assembly, the PT had no choice but to become an intransigent opposition, and its only successful parliamentary strategy, in terms of both media visibility and mobilization potential, was obstruction. Consequently, although the subnational legislature ensured some visibility to the opposition, parliamentary politics were not a crucial issue in Bahia.¹²

At the same time, and despite the limited interest they elicited, legislative and municipal elections were a significant component of the PT’s eventual victory in 2006. From these institutional positions, the opposition demonstrated its administrative competence and its capacity to moderate its discourse. These positions also allowed it reach out to a broader constituency, often through new clientelistic arrangements (Dantas Neto 2003; Barreira 2006; Borges 2010). As the PT gubernatorial candidate, Wagner flaunted his closeness to President Luiz Inácio Lula da Silva (also from the PT), whom he had served as a minister between 2003 and 2006 (Galo 2007).

BAHIA AFTER CARLISMO

In 2002, Jaques Wagner—former leader of the petrochemical workers’ union and three-term federal deputy for the PT—performed surprisingly well in the gubernatorial election, winning almost 40 percent of the vote, even though the PT and its allies won only a small minority of seats in the Legislative Assembly. The results were widely interpreted as signaling the decline of carlismo at the sub-

order to better survive the transition. ACM was a founding member and an influential leader of the federal branch of the PFL until his death (Rouquié 2006).

10. The Brazilian People’s Party (Partido Popular Brasileiro, PPB) and Brazilian Worker’s Party (Partido Trabalhista Brasileiro, PTB) emerged in 1984–1985 as splinters of the PMDB. While technically center and left-of-center, respectively, they quickly became personalist entities without ideological content but ready to exchange parliamentary support for executive influence (Fleischer 1998).

11. Magalhães et al. 1995; Souza 1997; TRE-BA 2010; Otto Alencar, vice-governor of Bahia, interview with the author, Salvador, August 16, 2011.

12. Euclides Fernandes, PDT state legislator, interview with the author, Salvador, August 3, 2011; Galo interview.

national level; at the federal level, it had just recently withdrawn from President Cardoso's coalition (Dantas Neto 2003).

From this position, Wagner assembled a broad coalition composed of eight parties (including the PMDB and PSDB), sufficiently large to defeat Paulo Souto, the carlista incumbent governor, in 2006 with 53 percent of the vote. Wagner's coalition also won a large majority of seats in the state legislature. In 2010, Wagner repeated the feat with a smaller coalition (the PMDB and PSDB presented their own candidates) but a larger majority—64 percent of the vote.¹³

Social autonomy

Wagner's election signaled an important change in state-society relations in Bahia. Whereas under carlismo only select, loyal groups had access to the government while others faced marginalization or outright repression, Wagner opened communication channels and established dialogue with numerous groups, from the MST to the black movement to the lesbian, gay, bisexual, and transvestite (LGBT) associations.¹⁴ Wagner himself constantly emphasizes his government's openness and transparency (Talento 2011; Wagner interview).

From a bureaucratic perspective, formal channels were created to frame this new relationship. Immediately after Wagner's arrival in office, he created the State Secretariat for the Promotion of Equality, centered on racial issues, and the State Secretariat for Women, devoted to gender affairs. While their budgets are limited, their role is to raise official awareness of these problems and to serve as institutional intermediaries between social organizations and the subnational government, thereby reducing the influence of personal ties.¹⁵

Nonetheless, many social organizations had to reorganize themselves as their leaders became government officials, and both government and social organizations had to come to terms with the responsibilities of their new political positions (Pinto interview). This complex process of adaptation afflicts many transition governments and is often, as in Bahia, a source of conflict and political frustration (Natal 2007).

Another important element of continuity is the subsistence of *governismo*. Wagner has insisted on forging as wide a social alliance as possible in order to guarantee his hold on power (Wagner interview). Numerous entrepreneurial organizations and individuals have taken advantage of this—and of their critical role in supporting Wagner's economic policies—to forge a place in Bahia's new governing alliance, despite having had close ties to carlismo (Dantas de Carvalho 2011; Galo interview). The most notable among them is Otto Alencar, former health secretary under ACM and vice-governor under carlista César Borges

13. Galo 2007; TRE-BA 2010; Jaques Wagner, governor of Bahia, interview with the author, Salvador, August 15, 2011.

14. Bujão interview; Wellesley Francisco, LGBT movement activist, interview with the author, Salvador, August 11, 2011; Reis interview.

15. Bujão interview; Elias Sampaio, state secretary for the promotion of equality, interview with the author, Salvador, August 11, 2011.

(1999–2002), and now vice-governor under Wagner since 2011 (Alencar interview; Wagner interview).

At a deeper level, some carlista political procedures remained relatively unchanged. This was the case with clientelistic practices. While Bolsa Família and other federal social programs limited discretionary resources available to governors (Fenwick 2009), subnational states still control significant patronage positions and funds that can be used in clientelistic fashion.

Political competition, combined with the new government's openness and its will to reach out to the largest audience possible, meant that scarce resources had to be shared among a larger number of recipients and that their long-term loyalty could not be taken for granted, but the fact remained that an important part of the government's base is still sustained by an exchange of material goods for political support. Carlismo's informal mediation channels thus largely reproduced themselves under Wagner (Barreira 2006; Mota 2007; Alencar interview; Pinto interview). Consequently, the subnational government's relationship with some of Bahia's most combative organizations evolved but did not break completely with the past. Most notably, the concrete agendas do not seem to have changed much.

Regarding the MST, its relationship with the government moved from open conflict to more complex relations, including both casuistic cooperation—in some cases, MST members have become PT candidates for municipal office—and open contestation of the new governor's pro-agribusiness stance. In the MST's eyes, however, the new negotiation spaces have produced very few results (Oliveira interview; Reis interview).

For the black movement, Wagner's arrival has also produced few results. To a certain extent, this is due to the movement's weaknesses: its extreme fractiousness and its ongoing dependence on neighborhood-based organizations, which have so far been unable to cover the entire state of Bahia. It is also victim of the Evangelical churches' increasing presence in Bahia and their socially demobilizing emphasis on individual salvation.¹⁶ As a result, the black movement has been unable to withstand Wagner's co-optation attempts and remains in a subordinate position vis-à-vis the state government (Selka 2005; Baiocchi and Corrado 2007; Bujão interview).

For the LGBT movement, on the contrary, Wagner's arrival meant increased recognition. Beyond being considered a public health issue, now education, cultural, and public security officials also deal with LGBT demands. Moreover, the government granted a number of subsidies to the LGBT movement that have allowed it to pursue and expand its activities (Francisco interview). However, the movement must now fully and unconditionally support Wagner, and its political autonomy can be seriously called into question (Marsiaj 2012).

16. While it is incorrect to portray all Evangelicals as socially demobilizing, and there even exists an active progressive Evangelical movement (Movimento Evangélico Progressista, MEP), the Evangelical churches are widely perceived as a threat by most social organizations (Selka 2005).

Rule of law

When the alliance between ACM and President Cardoso broke down, *carlismo* lost its leverage in the nomination of federal judges in Bahia. As a result, even though the local judiciary remained loyal to *carlismo*, important transformations began to occur in the federal justice system in Bahia, as most new judges were not *carlistas*. Lula's arrival to the presidency in 2003 reinforced this trend, which was completed in 2006 with Wagner's election as governor. The compilation of new electoral lists in the late 1990s also contributed to the electoral justice's autonomy from the subnational government (Galo interview; TRE-BA 2012).

In 2008, the Bahian judiciary, in collaboration with the state's public defender, launched a pilot project in a Salvador neighborhood to test the applicability of the principles of reparative justice (exploring the most effective means for quick adjudication and victim reparation, understanding the causes of crime, and fostering a peace culture). Although the project itself appears to be successful, the principle of reparative justice has not been extended to the Bahian judiciary as a whole (Tourinho de Miranda 2010).

The old system of nominating judges following partisan rather than merit criteria has persisted under the new federal and subnational governments, as it continues to be an important element in coalition maintenance. The parties belonging to Wagner's coalition have consequently negotiated all new judicial nominations in a sort of quota system similar to that used in executive appointments and reminiscent of *carlismo*'s coalition arrangements. Despite some personnel renewal, the independence of the judiciary under Wagner thus remains in question (Amora 2011).

Moreover, the political logic behind appointments continues to have perverse effects on the functioning of the judicial system, as lawyers—especially public defenders and state prosecutors—tend to be very cautious in bringing lawsuits against the government, for fear of stalling their careers. On the other hand, political concerns have priority over competence in determining judiciary appointments. As a result, the Bahian judicial system—and the Brazilian one, more generally—remain very conservative in nature and the judiciary marginalization of the majority has barely subsided (ICJ 2008; Fauré 2011).

Media concentration

The breakdown of *carlismo*, both inside Bahia and at the federal level, meant that broadcasting licenses were no longer automatically distributed to ACM and his associates. Nevertheless, media concentration is one of *carlismo*'s strongest heritages. As a result of a very long period of politicized licensing and manipulation, Bahia's largest and most influential media remain in the hands of *carlistas*. After ACM's death in 2007, his son, ACM Júnior, took control of Rede Bahia. The strategic alliance with Rede Globo at the national level helps it sustain its quasi-monopolistic status in Bahia.

Wagner's openness policy has meant that the old informal censorship meth-

ods are no longer rampant. Moreover, state funding of independent media has increased. As a result, both parties and social movements have improved access to the media (Senna interview). Nonetheless, the MST, the LGBT associations, and the black movement all complain that open political criticism remains difficult and that only major incidents are reported in the mainstream media.

While alternative information channels exist and have benefited from Wagner's far more tolerant position, they remain bound to print media with limited circulation and to the Internet, where they must compete among themselves and with many other sources. Consequently, public perception of social issues and demands remains biased and tends to minimize the extent of these problems (Bujão interview; Mott 2011; Reis interview).

Authoritarian enclaves

Wagner's election announced the suppression of the subnational authoritarian regime. Nevertheless, despite the new governor's political openness and willingness to negotiate with most social and political actors, at least two important enclaves have appeared: land tenure and police reform. While limited public debate has been possible, no new policies have emerged.

On the issue of land reform, Wagner and the PT openly challenged the old oligarchy's stranglehold on land tenure. The oligarchy's obvious association with *carlismo* and its economic decline turned it into a weak and dependent political actor, which the new government could manipulate through patronage and clientelism; while interior mayors now largely support Wagner (although not necessarily the PT), their actual political weight is now rather limited (Brito 2008; Alencar interview). Nevertheless, land reform has not been forthcoming, as Wagner promotes intensive export-oriented agriculture (mostly fruit and soya beans) in an effort to modernize Bahia's agriculture and increase its productivity (Droulers and Broggio 2008).

As a result, despite the PT's long-standing, if uneasy, links to the MST and the Catholic Church's land reform commission and its mild commitment to family agriculture, land reform has not been a priority under Wagner, who is unwilling to alienate the landowners' political support. Although open repression has subsided, police evictions of MST land occupations remain frequent in Bahia (Galo interview; Senna interview). Moreover, private militias (*capangas*) persist, tolerated, if not encouraged, and continue to intimidate, sometimes violently, MST and other land reform activists (Reis 2008, interview). The successful expansion of agribusiness in western Bahia has further prevented land tenure from becoming a pressing political issue.

Some social groups, most notably the MST and the LGBT movement, have consistently denounced police violence in Bahia, under *carlismo* as well as under Wagner, and have demanded profound investigations and thorough reform. However, their calls seem yet unheeded. While most actors recognize that, under Wagner, police violence has subsided, structural reform and investigation of human rights violations have not been forthcoming. The Military Police Restructur-

ing Act of 2008 sought to valorize the police and focused on its internal organization aspects (salaries, promotion), neglecting accountability and governance issues (*Correio* 2008; Mott 2011; Oliveira interview; Reis interview).

The presence of a repressive force, largely insulated from public inquiry into its day-to-day operations, is considered necessary to the survival of democracy, despite its infringement on liberal democratic principles and civil rights (Dupuis-Déri 2006). From within the police, calls for reform have also been inconspicuous. In late January 2012, a police strike erupted over salary and working conditions but no political demands were put forward. Wagner acted quickly to isolate the strikers and to suppress their movement with full federal backing that included direct military patrolling of Bahia's streets and a federal court promptly outlawing the strike. In contrast with previous experiences, however, there was no open violence against the strikers (José 2012; Mendes 2012; Rocha 2012). What political fallout will result from the strike—beyond a dip in Governor Wagner's popularity—remains to be seen.

In this respect, Bahia parallels Brazil's own authoritarian enclave, where, for the sake of political stability, land reform, human rights violations, and profound military reform were never seriously pursued (Agüero and Stark 1998). Consequently, there has been no federal pressure on the subnational state to take action on these issues.

Legislative independence

Before 2006, carlismo enjoyed an absolute or sometimes even a two-thirds majority in Bahia's state legislature. The advent of Wagner reversed the situation in political terms but not in a parliamentary sense, as the government continues to control a very large proportion of seats in the Legislative Assembly. Consequently, if dissent and criticism, even among governmental legislators, are better tolerated than before, the discipline required by *governismo* and effective coalition rule prevent the state legislature from engaging in substantive checks and balances.

Since procedural rules remain unchanged, the parliamentary wing of the PT and its allies are unable to pursue significant autonomous initiatives. An overwhelming proportion of bills still originate in the executive branch, which continues to enjoy a very high success rate. Consequently, the institutional credibility of the state legislature has not increased. A reflection of this state of affairs is that, despite their formal mandate, legislators engage in pork-barrel politics, but in discussing substantive projects, both social organizations and political parties take their issues directly to the governor's office (Alencar interview; Fernandes interview; Pinto interview).

From the opposition's perspective, however, things have changed. Rather than engaging in obstruction, as the PT did until 2006 (with very limited success), the former carlistas, now concentrated in the DEM,¹⁷ prefer to resort to judicial con-

17. In 2007, the PFL renamed itself the Democrats (Democratas, DEM) in an effort to remain an effective political force after the 2001–2002 scandals and ACM's death. In Bahia, the DEM perceives itself as a total opposition to Wagner and the PT (Antônio Carlos Magalhães [ACM] Neto, written questionnaire,

testation. They have thus been able to block some legislation on technical grounds (ACM Neto questionnaire; Sampaio interview). These institutional conflicts, however, have only strengthened the governor as the sole effective political intermediary in Bahia.

REGIME CHANGE IN BAHIA

In conclusion, regime change in Bahia has gone far beyond simple political alternation and elite circulation and incorporates a more profound democratization process. Nevertheless, important elements of continuity remain. In this section, I attempt to systematize both change and continuity and to uncover the links between both processes in order to better assess the nature of the current subnational regime.

The paradox between formal change and informal continuity is most visible in Bahia's legislative arena. The old carlista delegation to the subnational Legislative Assembly has been decimated, and the PT and its allies now hold an absolute majority. There is also a new generation of legislators, many of them with strong roots in social mobilization (Galo interview; Pinto interview). However, parliamentary procedures and political practice prevent these legislators from displaying significant initiative and guarantee ongoing executive control of the legislature. Moreover, the DEM's oppositionist practices—taking legislation before the courts in an attempt to block it—have further reduced the role of the legislature as a political forum. As a result, the Legislative Assembly is still not perceived as a crucial element in Bahia's governance structure.

In terms of social autonomy, Wagner has made a point of breaking with *carlismo* by introducing an unprecedented level of political openness and accessibility. Rather than rely entirely on personalism, the new governor has at least partially institutionalized this openness through the creation of the state secretariats for women and for the promotion of racial equality. Furthermore, as most social activists readily admit, censorship and repression have subsided noticeably (Francisco interview; Reis interview).

Some of the more solid social movements, such as the MST, have thus been able to develop more complex relationships with the subnational government, combining cooperation on a case-by-case basis with open criticism of government policy. This is a sharp break with *carlismo*, when social organizations were expected to either provide the government with unconditional support in exchange for material goods or remain excluded from public influence.

However, political openness and social outreach have had some unanticipated results. They have allowed some of the old carlistas to find a niche in the new regime. The need of Brazil's coalition presidentialism to maintain as large a coalition as possible, together with the economic power the old elites continue to wield, has ensured that the rotation of political personnel and public policies is not as profound as expected or announced. Brazil's traditional *governismo* prac-

Brasília, December 2, 2011). In late 2012, ACM Neto—ACM's grandson—was elected mayor of Salvador and is poised to be the DEM's gubernatorial candidate for Bahia in 2014 (Barros Neto 2012).

tices, including party switching to join the governor's coalition, if not necessarily his party (Borges 2010), have also facilitated this trend.

Moreover, the recent recognition of some social movements, such as the LGBT movement, as valid actors in the public sphere and the granting of public monies to support their activities has brought their political independence into question. Traditional clientelistic practices, especially in the interior municipalities, remain an active ingredient of Bahian political life.

Paradoxically, the rise in political competition has also had an unexpected effect on clientelism in Bahia. While a persistent feature of politics, clientelism has had to adapt itself to more competitive conditions, in which competing patrons offer ever-larger benefits to their potential clients. This process has placed significant stress on patron-client relationships, both because of the limited resources at hand and by limiting long-term loyalty. In terms of democratization, this trend marks some progress, but its end results remain to be seen. At any rate, political machines in Bahia are no longer what they used to be (Borges 2010, 2011).

Carlismo bequeathed Bahia with an important political heritage. Some of it will eventually disappear as carlista judges retire and are replaced by new appointees. However, the appointment process itself has changed little, as it is a critical element in coalition maintenance, and Wagner has not hesitated to appoint judges (or recommend appointments, in the case of federal judges) on the basis of political considerations rather than exclusively on merit.

Although informal censorship and harassment of small, independent media have subsided under Wagner, media concentration is another important legacy of carlismo. There are few and fragile alternative information channels, and none can compete with Rede Bahia's oligopolistic power, which does not hesitate to use the media to influence public opinion (see Magalhães Júnior 2011). As a result, the media has become an important instrument for the opposition to Wagner, but its concentrated character, centered on a single group, underscores its oligarchic rather than democratic nature.

As in other places, regime change in Bahia has been the result of complex processes and intense negotiations, sometimes open, sometimes implicit in political action or in tacit elite agreements (cf. Garreton 1989; Karl and Schmitter 1991). Consequently, democratization has been imperfect and authoritarian enclaves have emerged, even if not directly related to carlismo as a political group.

The most notable among them are land reform, blocked by Wagner's alliance with Bahia's agribusiness sector, and police reform, stalled by law-and-order considerations as well as by the federal amnesty on military crimes committed under the dictatorship. While the concerned social organizations have frequently denounced government inaction, these issues have not reached the public agenda and no structural reform has taken place in either case, despite previous engagements from the PT (Oliveira interview; Reis interview).

The absence of federal support in this matter has also limited local efforts and points to structural limits in subnational regime change: Brazil's Constitution, political dynamics, and authoritarian enclaves all have direct incidence in Bahia's political system, thereby reflecting a certain subnational dependence on federal dynamics (Gibson 2005).

In conclusion, regime change in Bahia has not been a linear, homogeneous process. While undeniably a measure of democratization has taken place, Bahia is not a full inclusive polyarchy, in Dahl's terms (1971), nor even a near polyarchy. It is, however, too early to ascertain its exact nature. Despite Wagner's landslide reelection in 2010, it cannot be said that Bahia's current regime has become consolidated (cf. Linz, Stepan, and Gunther 1995). One of its most important challenges will be the 2014 gubernatorial election, in which, according to the Constitution, Wagner cannot be a candidate for a third consecutive term and the risky issues of succession and regime reproduction will be at stake.

BAHIA AND THE PROCEDURAL DEFINITION OF DEMOCRACY

In studying regime change in Bahia, Dahl's procedural definition of democracy has proven to be an effective but limited analytic tool. While it has allowed for an in-depth, historical comparative study of Bahia under and after *carlismo*, it cannot fully explain certain critical elements, most notably the role of informal practices in regime performance.

In the case of Bahia, and Brazil at large, the informal dynamics of coalition formation and elite circulation are critical elements of participation and contestation that can only superficially be addressed with a formal, procedural definition of democracy. While some work has been done in this respect (Desposato 2006), the field remains in its infancy.

Dahl noted that his definition of democracy (which he named *polyarchy*) was to be understood as an analytic criterion, allowing for identification and classification, rather than as a political goal (for which he reserved the term *democracy*). Consequently, he conceived of regimes, such as Bahia's, in which democratic features coexisted with authoritarian elements, as perfectly feasible (Dahl 1971). Moreover, even full, stable polyarchies face important challenges in fulfilling and sustaining the constitutive elements of democracy over the long term (Denk and Silander 2012).

Other scholars have worked more closely on the coexistence of democratic and authoritarian procedures, called hybridization (Diamond 2002; Recondo 2007). However, as the case of Bahia shows, hybrid regimes are very fluid and extremely complex. Again, in order to gain a better grasp of these dynamics, the relationship between formal procedures and institutions, on the one hand, and informal practices, on the other, needs to be further addressed. In terms of democracy, we need to know more about how democratic procedures and institutions allow for and legitimize the persistence of authoritarian practices.

In the context of hybrid regimes, neo-Weberian scholars have created the concept of neopatrimonialism in an attempt to explain the coexistence of different, often divergent political logics in a single political system (Eisenstadt 1973; Médard 1991; Bach and Gazibo 2011). While Bahia might in fact constitute a neopatrimonial society—a question the procedural definition of democracy cannot address—the analysis must extend beyond legitimacy itself and focus on the links between social perceptions of politics and the emergence and consolidation of concrete institutions and practices. Once again, further research is needed.

A final issue is the subnational nature of the Bahian transition. Dahl recognizes

that while his criteria might be useful for the study of subnational regimes, they may be incomplete. The study of Bahia demonstrates that this is the case. The procedural definition of democracy allows us to perceive that the federal-subnational connection is extremely important in understanding state-level politics, yet it does not provide any criteria to investigate it in detail.

Once more, the state of the field is unsatisfactory; some scholars argue that a system-wide perspective is necessary, since federal tolerance of authoritarian practices is essential to the survival of subnational authoritarian regimes, thereby giving priority to federal-level dynamics (Gibson 2005; Borges 2011). Other scholars argue that it is necessary to fully understand local logics and dynamics if the nature of subnational politics is to be properly understood (Durazo Herrmann 2010; Behrend 2011). While this study focuses exclusively on Bahian politics and thus takes the latter position, it is clear that a profound understanding of Brazilian federal politics is necessary in order to fully explain the subnational case.

These theoretical reflections on regime change in Bahia are largely inconclusive. Yet I remain confident that our understanding of subnational regime change has advanced, at least in the case of Bahia, and I am convinced that future research projects will do well in attempting to address the theoretical questions outlined in this article.

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