

# FIRST LADIES IN POLITICS: LESSONS FROM LATIN AMERICA, 1990 -2016

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# **Chapter 1: Introduction**

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## 1.1 The Puzzle

The political activity of first ladies has dramatically grown in the last two decades. These women are actively participating in political campaigns, leading public policies, and assuming decision-making responsibilities in the government. First ladies are unelected and unaccountable actors who nevertheless influence presidential behavior and executive politics. The increasing importance of their role has allowed them to acquire political capital and even to enter the political arena. In Latin America, between 1999 and 2016, 20 former first ladies ran for office 26 times and were elected on 19 occasions. These candidates became presidents (two), vice presidents (three), and legislators (fourteen).

First ladies have been an object of analysis in recent studies of the American presidential mandate. These studies have focused on the first ladies' roles (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Watson, 1997; Wekkin, 2000), their impact on the presidential campaigns (Burns, 2005; Burrell, Elder, & Frederick, 2011; MacManus & Quecan, 2008), their types of representation (M. Borrelli, 2011), their absence of accountability (Borrelli & Martin, 1997; Broyde & Schapiro, 1998; Eksterowicz & Roberts, 2004; Patel, 1998; Wasserman, 1995), their histories (Burrell et al., 2011; Caroli, 2010; Eksterowicz & Paynter, 2000; Watson, 1997), the press framing (Burns, 2004; Kalyango & Winfield, 2009; Winfield, 1997a, 2007), and their political influence (Borrelli, 2002b; Mayo, 2000; O'Connor, Nye, & Van Assendelft, 1996; Watson, 1997, 2001). However, scholars have failed to analyze the phenomenon in other countries. The lack of research on Latin American first ladies is particularly surprising given the critical role that they have played in politics at the international, regional, and national levels.

Although the concept of the first lady is frequently used in the literature, there is no consensus on a definition of the role. In most cases, the title has been used to describe the wife of the head of government in presidential regimes around the world. However, Latin American politics indicates seven possible combinations between a president and a first lady: (a) the president is a married man, and the first lady is his wife; (b) the president is a non-married man, and the first lady is his mother, daughter, sister, or anyone appointed to the role; (c) the president is a married woman, and the position is filled by

her husband, the “first gentleman”; (d) the president is a non-married woman, and the first lady is her daughter, son, sister, or anyone appointed to the role; (e) irrespective of the head of government’s gender, the position remains or becomes vacant; (f) irrespective of the married presidents’ gender, the president divorces during his or her term and appoints someone else to the position; (g) the president is a married homosexual and appoints his or her husband or wife. In this dissertation, a first lady<sup>1</sup> is a person who has held the position at the national government<sup>2</sup> level for at least one year.

Much of their work in support of the president’s agenda is completed behind closed doors, but some formal institutions reinforce their role. The office of the first lady is an agency within the institutional presidency that directly supports her performance with its staff, budget, organizational subunits, and tasks. Eleven of eighteen Latin American countries have an office of the first lady. The structure and power of the office of the first lady are different in every country, and the degree of institutionalization varies widely.

In the Dominican Republic, for example, the office of the first lady, created in 2000, is relatively new. Moreover, the office head exercised substantial influence in the policymaking process and setting the president’s agenda. For instance, the office of the first lady has more resources than some ministries. The budget of the office of the first lady in 2010 was \$USD 19,590,767, and the budget of ministry of women's affairs was \$USD 9,429,782 (Benito Sánchez, 2015, p. 65).

Some first ladies do play essential roles in domestic and international politics. Several scholars agree that, over time, the role of first ladies in the United States have

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<sup>1</sup> In this dissertation, however, the first lady is assumed to be female and addressed as a “she” given the fact that the “traditional” first lady as wife of a male president is by far the most frequent. The majority are women (wife, daughter, or sister) and only recently have women former first ladies been nominated for elections. Some authors propose the use of a gender neutral name in both cases: first spouse (Burrell, Elder, & Frederick, 2011; MacManus & Quecan, 2008) or presidential spouse (Watson, 1999). However, politicians, journalists, researchers, and citizens still call the position by the “traditional” name. The details of family relationships of Latin American first ladies is explained in the section “Central concepts and definitions.”

<sup>2</sup> In some federal American countries, the wives of the governors are also called first ladies, such as in the United States of America, Mexico, and Brazil. This woman plays an important role at the subnational level. This phenomenon also occurs in Colombia, a unitary state. In this country, a national association of first ladies exists. The “*Asociación de Primeras Damas de Colombia (ASODAMAS)*” (Colombian First Ladies Association) organized a national meeting of all first ladies of the Colombian regions (wives of governors) in 2008. Since then, the association has had regular meetings and events.

become more political (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Page, McClanahan, & Weiss, 2008; Wasserman, 1995; Watson, 1997; Wekkin, 2000; Winfield, 1997a). In Latin America, the role of first ladies has become so political that the position itself offers an excellent platform to influence the agenda, promote public policies, accumulate political capital and participate in elections.

Former first ladies are a unique type of candidate because they enter the electoral arena after holding a position of political privilege without being elected. First, the media extensively covers first ladies, so they are widely known to the electorate. This media exposure allows first ladies to influence the public agenda, promote their policy positions, and expose their political skills. Second, first ladies enjoy material benefits because they can use the resources of the executive, such as staff members, official transportation, and public funds, for self-promotion. Third, first ladies enjoy symbolic benefits: they are often considered role models for women, mothers, activists, and even the fashion industry (Wekkin, 2000; Winfield, 1997a). Fourth, as wives of the president, first ladies are in a unique position to network with elites and civic organizations and, therefore, build political capital. Fifth, since first ladies do not make important decisions, the press, interest groups, and politicians are unlikely to antagonize them. Even if they are criticized, first ladies cannot be legally dismissed or held responsible for official duties.

Between 1990 and 2016, 20 former first ladies ran for office 26 times. These candidates became presidents (two times), vice presidents (three), and legislators in unicameral (eight) and in bicameral (five senators and one deputy) congresses. The irruption of former first ladies in the electoral arena is unlikely to be a temporary trend. Political analysts, journalists, and academics have often dismissed the merits of these candidates, describing them as mere delegates of their husbands (Grondona, 2007; Leuco, 2015; Markous, 2013; O'Grady, 2014; Pérez Salazar, 2013; Serra, 2007; Serrafiero, 2015; Zovatto, 2014). However, this conventional view conflates politically experienced women with inexperienced ones. In doing so, the view obscures the merits of politically experienced first ladies, which in turn limits their ability to increase the participation and visibility of women in politics. Moreover, the idea restricts our ability to understand how their candidatures relate to potentially new patterns of competition and circulation in the political elite.

Despite the increasing importance of first ladies in Latin American politics, no preceding research has tried to answer under what conditions first ladies participate in politics. The analysis of the participation of Latin American first lady in politics is urgent for at least five reasons. First, first ladies are not fully vertically and horizontally accountable for their actions (Broyde & Schapiro, 1998; Wasserman, 1995). Usually, a first lady's working area is not regulated, which implies that her role is not officially explained or formalized. The absence of accountability and responsiveness of the first lady raise questions about the legitimacy and legal status of the role.

Second, the office of the first lady might lead to institutional problems in the government, such as coordination, efficiency, and transparency. For instance, the structure and budget of the office of the first lady within the institutional presidency can affect the coordination of the cabinet. Also, the office can handle considerable money and resources to promote public policies. As the office does not have a specific topic, it can overlap issues of other agencies, like the ministry or office of women's affairs, social services, and children. The topic's overlap generates inefficient use of public resources and duplicity of tasks. Furthermore, the majority of the offices are allowed to receive private donations. This lack of transparency increases the risk of corruption and bribery.

Third, the candidacy of an ex-first lady reinforces dynastic relations in the political elite. Dynastic politicians are those related by blood or marriage to other individuals formerly holding political office (Dal Bó, Dal Bó, & Snyder, 2009; Folke, Rickne, & Smith, 2017; Geys & Smith, 2017). Political dynasties have long been present in democracies, raising concerns that inequality in the distribution of political power reflects imperfections in democratic representation (Dal Bó, Dal Bó, & Snyder, 2009, p. 115). Adding former first ladies to the list of members of political families that rotate in positions of power in Latin America will make those families even more powerful, restricting the competitiveness of regional political systems.

Fourth, the first lady's political performance increases the visibility and participation of women in politics and diversifies the ways females enter the electoral arena. Historically, women have been underrepresented in the highest offices because they face great visible and invisible (glass ceiling) obstacles to entering politics (Htun 2015; Norris 1997b; Norris and Inglehart 2001). Men have dominated public posts, and politics has been read and understood in masculine codes and standards, excluding

women in deliberations and decision-making processes on matters of public interest (Peschard, 2003, p. 20). Centered on Latin America, Došek et al. (2017, 216) use the metaphors of concrete, glass, and cash ceilings to illustrate the obstacles that women face in politics. Women need to break through a concrete ceiling to overcome self-imposed limitations based on prejudices about their skills or potential contributions to politics. Women break through a glass ceiling when they can ascend through leadership ranks within their parties and become successful politicians. Finally, women overcome a cash ceiling when they manage to obtain the financial resources necessary to run electoral campaigns.

Preceding studies have indicated that the main consequence of the rise of women in politics is an increased expectation to see more women in positions of authority in the state (Escobar-Lemmon & Taylor-Robinson, 2005; Thames & Williams, 2008, 2013). This argument is twofold. First, female legislators encourage other women to run for office. While Fox and Lawless (2010, p. 321) find that the most critical predictor of considering a candidacy is the encouragement from other political actors, Atkeson (2003) finds that women who live in states with visible female candidates are more likely to be politically engaged. Second, female politicians affect the political culture of their countries and, therefore, increase the social acceptability of women participating in politics. For example, efforts to elect more female legislators have often included claims that women change political practices, bring new policy priorities, interact differently with constituents, and modify the legislature's political culture (Inter-Parliamentary Union, 2014, p. 15).

Fifth, the study of the institutional and political performance of Latin American first ladies contributes to an unexplored area in the literature of elites, executives, and women in politics. The role of the first lady and subsequent exercise of formal and informal power carries significant implications for our understanding of this position, the presidency, and the political system (Borrelli, 2002b, p. 25).

Many variables affect the personal, institutional, societal, and public policy levels of the first lady's political activism or performance (Erickson & Thomson, 2012, p. 57). This dissertation focuses is the institutional and personal conditions that influence the policy role of first ladies during her governmental and post-presidential years at the

national level. To accomplish this, I conducted a comparative cross-country analysis in three independent but closely related research papers.

To understand under what conditions first ladies participated in Latin American politics in the period 1990-2016, the study of both the institutions and politicians are important. Some first ladies play an active role in politics during their husbands' presidential term. The office of the first lady is the agency within the institutional presidency that supports the first lady's performance. Some first ladies have had an outstanding policy roles during their husbands' presidential terms with institutional support and have continued in politics after the end of the administration. The position itself offers an excellent platform to accumulate political capital and enter the electoral arena. Finally, some former first ladies have taken advantage of the political capital accumulated during the presidential mandate and won an election.

The cumulative thesis proceeds as follows. The next section of this chapter presents the scholarly literature about first ladies, general research designs, and central concepts and definitions. The second chapter, "The Office of the First Lady: Evidence from Latin America, 1990-2014," presents the institutional side of the first ladyship. This section focuses on the institutionalization of the office of the first lady from an intra-regional perspective. These offices vary in scope and nature between different countries. The paper investigates the structure of the institution in 18 Latin America countries within the institutional presidency and its level of institutionalization across the dimensions of autonomy, adaptability, complexity, and coherence. On this basis, the chapter presents an index of institutionalization of the office of the first lady in Latin America from 1990 to 2014.

The third chapter, "When Do Former First Ladies Run for Office? Lessons from Latin America" argues that former first ladies run for office when they have experience as elected politicians and when they have an opportunity to become competitive candidates. The chapter analyzes the 88 former first ladies who were available to become candidates in 133 elections in 18 Latin American countries from 1990 to 2016 using discrete-time duration models. The findings demonstrate that women who held elected positions before becoming first ladies are more likely to run for office after they leave the executive and that they time their careers strategically, competing in the first election after

serving as first ladies. This study is co-authored with Dr. Ignacio Arana Araya of the Carnegie Mellon University in the U.S.

The fourth chapter, “Political Capital of Elected Former First Ladies in Latin America, 1990-2016,” focuses on the conditions that impact the political capital of elected former first ladies. Several ex-first ladies have chosen to either initiate or continue a political career at the end of their husbands’ presidential terms. In fact, in Latin America between 1990 and 2016, 20 ex-first ladies have run as candidates in elections 26 times, for the presidency, the vice presidency, or as a member of parliament, and have been elected 19 times. The empirical evidence reveals that all ex-first ladies nominated for Congress have been elected. The findings suggest that a combination of conditions related to their political capital have an impact on their success.

Finally, the last chapter discusses the implications of the empirical findings of all three essays, their implications for theory, and future avenues of research. This comparative empirical study is the first step into a rather new field of research providing a starting point for a more comprehensive analysis of first ladies as part of the Latin American political elite. Thus far, studies on first ladies have mainly been restricted to the United States of America. This research aims at closing the knowledge gap regarding first ladies as members of the political elite in Latin American through an empirical approach and opens avenues for further research providing a new framework based on comparative, context-sensitive empirical evidence.

## 1.2 Literature Review

While the individual chapters present more specific literature reviews, the following review serves as a general overview of the relevant findings and current research gaps in the broad topic. Although the field of first ladies studies is new, some articles and books have begun to systematically analyze the phenomenon. The study of the first lady can be classified by geographic focus: mostly cases in the United States of America. However, recent studies have focused on Latin American first ladies and incipient literature has examined the African and Asian realities.

Watson (1997) and Stooksbury and Edgemon (2003) revised literature about the first ladies in the United States of America. The first author concluded that the research on the presidential spouse had been focused on the historical development of the institution, her political activism, and her influence. Meanwhile, Stooksbury and Edgemon (2003, p. 106) pointed out that the research has tended to coalesce around the following three themes: the individual first lady's role, the political influence of and constraints upon the first ladyship, and the formal construct of the office. These categories are neither mutually exclusive nor absolute.

To date, the dominant approach taken in studying first ladies has been historical and biographical (Borrelli, 2002b, p. 27). These studies have focused on the first ladies' personal history and the development of the role (Black, 2001; Burrell et al., 2011; Caroli, 2010; Eksterowicz & Paynter, 2000; Watson, 1997, 2001). This research has taken a more general approach by investigating the first ladyship and its occupants over time (Stooksbury & Edgemon, 2003, p. 98). Also, some first ladies have written autobiographies. The autobiographies offer a great deal of commentary about the nation's hostess role, presenting it as performed in both the private and the public spheres. In the private sphere, every author-subject writes at length about her children and family life in the White House (Borrelli, 2002a, p. 360).

The literature has grown over the last several years. Scholars of the U.S. first ladies have shown the relevance of the position in domestic and international politics and have studied further topics. The literature has concreated on the roles of the first ladies (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Page et al., 2008; Wasserman, 1995; Watson, 1997; Wekkin, 2000; Winfield, 1997a), the absence of

accountability of the role (Borrelli & Martin, 1997; Broyde & Schapiro, 1998; Eksterowicz & Roberts, 2004; Patel, 1998; Wasserman, 1995), the political influence (Borrelli, 2002; Mayo, 2000; O'Connor, Nye, & Van Assendelft, 1996; Watson, 1997, 2001), the types of representation of the first ladies (Borrelli, 2011), the impact of the first ladies on the presidential campaigns (Burns, 2005; Burrell et al., 2011; MacManus & Quecan, 2008), press framing (Burns, 2004; Kalyango & Winfield, 2009; Winfield, 1997a, 2007), and the office of the first lady (Borrelli, Tenpas, & Wright, 2017; Eksterowicz & Paynter, 2000; Watson, 2000).

### *Roles of first ladies*

Some scholars offer a categorization of first ladies in the United States among the tasks that they have had over time (M. Borrelli, 2002b; Burns, 2004; Eksterowicz & Paynter, 2000; Erickson & Thomson, 2012; Muir & Benitez, 1996; Page et al., 2008; Wasserman, 1995; Watson, 2000b; Wekkin, 2000; Winfield, 1997a). The authors of these studies assessed first ladies' performance and activities in politics as the extent of the role's social evolution. These scholars' agree not only with the characteristics of the traditional position, such as participation in ceremonial and protocol events, but also with the emerging political role. However, the authors differ in the number and specification of the office's functions.

For instance, O'Connor et al. (1996, p. 843) recognize three types of first ladies: the ceremonial first lady, the political-representative first lady, and the policy first lady. Meanwhile, Winfield (1997, p. 167) identifies four types: (a) the "escort" role, the wife is mentioned by virtue of accompanying her spouse, not because of any independent function"; (b) the "protocol" role, leading fashionable society at social, ceremonial, and diplomatic events; (c) the "noblesse oblige" role, charitable and good works concerned with orphanages, the homeless, or the poor, which represents a natural extension of women's volunteer work in the community, and (d) the "policy" role, helping to formulate, develop, and influence public policy issues.

Burns (2004, p. 2) also identifies four types: public women, gendered celebrities, political activists, and political interlopers. Borrelli (2002, p. 26) similarly considers four roles: policy advocates, spokespersons, campaign surrogates, and presidential partners.

Wekkin (2000) characterizes six roles of the first lady. A conscript is a reluctant woman ill-suited for political life, who is dragged into politics by marriage, only to flee the pressures of the title by retiring to private family quarters. A shield is a classical marital partner who reflects the prefeminist “helpmate” construct of womanhood: spouse, mother, caregiver, and soulmate, devoted to needs of her political spouse. A courtesan wife does not seek a policy role, but instead courts deference by playing the role of gatekeeper to the political elite. A consigliere first lady is the president’s “Minerva,” a confidante and counselor on most or all aspects of statecraft. She, rather than the chief of staff or any other advisor, may be the president’s alter ego. A regent occurs when the president is temporarily prevented from full duty when recovering from illness. In this case, the first lady may take an active role in daily scheduling, acting as the shadow president. A co-president first lady is acknowledged as the president’s policy partner.

Finally, Watson (2000, p. 72) conceptualized 11 fundamental duties of the first lady: (a) wife and mother, (b) public figure and celebrity, (c) nation’s social hostess, (d) symbol of American women, (e) White House manager and preservationist, (f) campaigner, (g) social advocate and champion of social causes, (h) presidential spokesperson, (i) presidential and political party booster, (j) diplomat, and (k) political and presidential partner.

Some authors have been focused on the role of the first lady in a dictatorship context (Ducret, 2011, 2012; Gasparini, 2002; Windgassen, 2002). They demonstrated her influence in the regime and how the dictatorship context’s impact on the first lady’s performance. Some first ladies reinforce the prominent role of the president by only discreetly supporting his activities, and others have an active role in the regime.

A few studies have focused mainly on the international role of the first lady (Erickson & Thomson, 2012; Patel, 1998; Van Wyk, 2017). They argue that first ladies have personal, political, and structural abilities to be actively involved in domestic, regional, and international politics. For instance, a first lady accompanies the president on official travel, attends meetings in other countries and at international conferences, and gives speeches at the assembly of the United Nations. Erickson and Thomson (2012, p. 243) created a taxonomy of first lady diplomacy roles. They identified six functions: escort, aesthete, surrogate, cultural emissary, goodwill ambassador, and social advocate. Further, they categorized these roles into three rhetorical tasks (the management of

presidential credibility, international relationships, and social issues). Van Wyk (2017) analyzed the diplomacy performance of Southern African first ladies using those categories.

In summary, several scholars agree that, over time, the role of first ladies in the United States have become more political (Burns, 2004; Mayo, 2000; Muir & Benitez, 1996; Watson, 1997), and first ladies increasingly participate in domestic and international politics.

#### *Legal status and accountability*

The first lady's legal status and official duties are controversial because she is not officially appointed and does not have formal tasks and responsibilities. Scholars criticized that first ladies are not accountable not only to the voters but also to other governmental institutions (Broyde & Schapiro, 1998; Fernández Ramil & Rivera Urrutia, 2012; Patel, 1998; Wasserman, 1995). These debates about the first lady's formal status and power did not discourage modern presidents' wives from becoming more deeply involved in presidential policy-making processes. Their engagement did, however, raise questions about the accountability and responsiveness of the first lady as a presidential advisor (Borrelli, 2002b, p. 31).

This legal status was debated in 1993 in the US when president Bill Clinton established the president's task force on national health care reform and named his wife, Hillary R. Clinton, as the chairman. The Association of American Physicians and Surgeons asked the Court of Columbia to determine the status of the working group because Mrs. Clinton, a private citizen, chaired it. The U.S. Court of Appeals for the District of Columbia (997 F. 2d 898) said it was reasonable to treat the president's spouse as "a *de facto* officer or employee" of the government, even though she is not formally appointed and takes no oath of office. The Appeals Court case is famous because it represents the first ruling on the position of the first lady. As such, this case serves to recognize the office of the first lady as an institution (Eksterowicz & Paynter, 2000, p. 421). However, the position was not regulated and still remain ambiguous. Broyde and Schapiro (1998, p. 479) suggest that the first spouse's increasingly public involvement in policy matters requires a more formal definition of the first spouse's official status.

Informally, her status is contingent upon societal judgments about gender, autonomy, and power (M. Borrelli, 2011, p. 196).

The vagueness of the role has some advantages for the first lady. The position without portfolio, statutory legitimacy, electoral mandates, or clearly defined roles and responsibilities (Watson, 2003, p. 434) allow flexible performance in the position. For instance, the fact that spouses cannot be fired makes them less vulnerable to the usual constraints on and criticism of presidential advisers (Edwards & Wayne, 2013, p. 230).

#### *Political influence*

Numerous memoirs and biographies indicate that these women have exercised various kind of political influence (Borrelli, 2001, p. 398). Watson (1997, pp. 815–816) summarized the influence of the presidential spouse with three Ps: political influence, pillow influence, and public influence. The political sphere of influence encompasses the more formal activities of politics, such as speech writing and editing, policy advising and advocacy, lobbying, selecting or endorsing presidential appointments, and campaigning. The pillow influence is apolitical and informal, including behind the scenes influence that might come simply from being the president's partner, lover, and confidante. Finally, the public influence involves the potential to shape public opinion on many issues, politics, and the presidency. For instance, first ladies have hosted foreign dignitaries and entertained visitors to the White House, campaigned for their husbands and for causes they support, traveled around the world, and written or spoken to large audiences.

Despite the consensus that first ladies might influence the president's decisions (M. Borrelli, 2001; O'Connor et al., 1996; Watson, 1997, 2001), scholars admit the difficulty in measuring the degree of this influence. O'Connor et al. (1996, p. 837) identified two factors: (a) the inherent difficulties in determining, measuring, or attributing influence and (b) societal norms that continue to make it unattractive for most first ladies to give even the appearance of wielding influence. Likewise, Watson (2001, p. 10) argued that be because of the political controversy that would result if either a president or his spouse admitted that a first lady influences policy (especially prior to the mid-twentieth century), presidential couples have tended to downplay the influence of wives.

*Presidential campaigns*

Some potential first ladies play a role in electoral campaigns. Usually, they participate in electoral acts with the presidential candidate, but sometimes, they join activities alone. MacManus and Quecan's (2008) research indicates that wives act as surrogate candidates in U.S. presidential campaigns. They found that spouses are more likely to visit battleground than non-battleground states and make more appearances closer to election day.

The media cooperate with the visibility of the first lady's candidate support, covering the activities and stories. For instance, Winfield (1997, p. 176) pointed out that, for Hillary Clinton, the media covered her performance from her husband's presidential campaign because she was breaking the acceptable boundaries of a presidential candidate's wife. The media standards of a presidential candidate's first lady vary among countries, and journalists frequently compare candidates' wives, past and present (Burns 2005, p. 684).

*Press framing*

Scholars have studied the change in media framing for the role of the first lady (Kalyango & Winfield, 2009; Winfield, 1997a, 1997b; Burns, 2004). They agree that the media plays a determinant role in the image of the first lady. In the US, in the past two centuries, the first lady has become a collective image, undefined when the country was founded but framed by the media (Winfield, 1997a, p. 178).

The media could affect the popularity and the first lady's image in either positive or negative way. On the positive side, the media can cover all her activities; promote her programs or policies; give her time on television, radio, and the internet; convert her to a celebrity; and report on her performance. On the negative side, the press can criticize her performance, uncover a story about her past, or not cover her activities. For example, as Alcántara (2012, p. 198) notes, investigative journalism can uncover corruption or fraud with determinant political consequences. As a consequence of the media coverage, the political impact and public visibility of the first lady may be much higher than that of ministers, parliamentarians, regional authorities, and even the president.

*The office of the first lady*

Scholars of the U.S. office of the first lady (Borrelli et al., 2017; Eksterowicz & Paynter, 2000; Watson, 2000) have documented that the office provides political and technical support to the first lady's roles and collaboration with the presidential agenda. According to this literature, the agency has exhibited an institutional expansion in organizational, political, and functional aspects. Borrelli et al. (2017, p. 33) interviewed members of the first lady's staff lady in the United States across administrations and identified three explanations for the organization and reorganization of the institution: in response to functional and political demands made (a) by the West Wing (president's office), (b) by presidential and congressional campaign organizations, and (c) by the first ladies. Eksterowicz and Paynter (2000) demonstrated that the office of the first lady has become more professional and has been moving in the direction of full integration with the President's White House Office.

*Case study and regional approach*

Some particular women have had a substantial impact on the literature. Most historians credit Eleanor Roosevelt with changing the role of first ladies. She, more than any other in her time, defined the role of a modern, activist first lady (Eksterowicz & Paynter, 2000, p. 549).

In recent times, Hillary Clinton is the most studied first lady (Burrell et al., 2011; Muir & Benitez, 1996, 1996; Scharrer, 2002; Templin, 1999; Winfield, 1997b). For instance, public opinion research on first ladies lacked until Hillary Rodham Clinton (Stooksbury & Edgemon, 2003, p. 103). Her active role in politics during her husband's government (Bill Clinton, 1993-2001) was discussed several times. In this regard, the public opinion questioned whether the first lady should have such an active role in policymaking (Troy 1997, 2000). For the first time, the nature and tasks of the first lady were officially debated. Hillary Rodham Clinton's tenure as chair of the Health Care Reform Task Force, and the subsequent litigation surrounding her role, drew attention to the ambiguous legal nature of the first lady's authority (Stooksbury & Edgemon, 2003, p. 106). Her later performance as Senator (2002-2009), Secretary of State (2009-2013), and her nomination for the presidency (2016) are landmarks in first lady history since she was the first former first lady in the US who ran for office.

Some researchers of first ladies in other regions have recently emerged. Scholars of Latin American first ladies have written biographies (Caula & Silva, 2011; Gordinho, 2009; Huber Abendroth & Bridikhina, 1998; Malta, 2014; Ruiz, 2012; Wornat, 2005a, 2005b), personal analyses (Fernández, 2011; Rosenheck, 2011; Santamaría, 2011; Sefchovich, 2011), and historical reviews of specific countries, such as Argentina (Sierra, 2002), Dominican Republic (Balcácer, 2010), México (Sefchovich, 2003), and Uruguay (Vierci, 2014). Also, Guerrero Valencia and Arana Araya's (2018) novel investigation proposed a classification of former first ladies who had been candidates in popular elections according to their previous political experience. The researchers classified the former first ladies into politicians and political surrogates or heiresses.

In personal terms, the most crucial referent of first ladies in Latin America is Eva Peron, who is an icon in Argentinian politics. She is the most influential female politician in Argentine history who never occupied an official executive post (Barnes & Jones, 2011). For Rosenheck (2011), every Argentine political woman suffers from original mortal sin: not being Eva Perón. Thus, the press analyzed her behavior against the image of "Santa Evita."

Recent studies about African first ladies have also developed. For instance, Van Wyk (2017) analyzed different aspects of Southern African first ladies, such as their political role, offices, influence, and activities. She has found that the office of the first lady in Africa is formally and informally institutionalized. Southern African first ladies wield considerable influence, and the office of the first lady is one of the vehicles available to perform her role. The office of the first lady is a relatively recent institution in African politics, providing administrative support for the first lady to support her husband's political agenda (Van Wyk, 2017, p. 161).

In Asia, Park Geun-Hye has been studied. She was the first lady of South Korea (1974-1979) after the assassination of her mother. She continued a political career in Congress, and in 2013, she was elected president. Lee (2017, p. 387) suggested that Park capitalized on her kinship to her father, which provided her political apprenticeship and socialization, as well as the regional support base.

In a cross-regional comparative perspective, Kalyango and Winfield (2009) compared the electoral campaigns of the former U.S. first lady, Hillary Clinton, to that of

Uganda's first lady, Janet Museveni. They concluded that the treatment of the first lady political candidate in the news remains more disparaging in Uganda than in the U.S. press. The U.S. newspapers covered Clinton's campaign speeches and platform on international peace initiatives and national security, yet the Ugandan press did not highlight Museveni's statements on the northern war and peace initiatives. These newspapers underscored their first lady familial duties and framed them as emotionally weak and unfit to serve beyond political spousal roles.

#### *Current Research Gaps and Overarching Contributions*

The first lady as a political actor has historically been ignored by scholars (O'Connor et al., 1996; Watson, 2003). In recent years, scholars have begun to conduct studies about first ladies in sociology, history, journalism, and political science. The multidisciplinary interest indicates the relevance of the topic.

Scholars have performed few systematic and comparative investigations of first ladies and frequently consider only the U.S. reality. The investigations focus mostly on case studies, and diverging research designs and conceptualizations characterize the majority of the studies. Consequently, these studies are hardly appropriate for comparative analyses or for theoretical generalizations beyond the contextual factors of the specific cases they address. Although literature has referred to the political role of first ladies, first ladies' high participation in politics has not been measured in a comparative, systematic, theoretical and empirical way.

There is currently a prevalent use of qualitative methods in the research on first ladies. Despite significant progress in this qualitative literature, an exhaustive analysis of the conditions in which first ladies participate in politics during the presidency and in the post-presidential years, even in the US reality, remain under-researched. The systematic empirical testing of quantitative variables is still underexplored.

The Latin American literature provides only details of life and anecdotes of some first ladies. In contrast with the American literature, there have not been many systematic and comparative studies to understand the evolution and changes in the role in each country in the region, in political participation over time, or in first ladies' influence on government. Furthermore, there has been no exhaustive comparative analysis of the political participation of first ladies in Latin America considering their career, their

political capital, and their offices within the institutional presidency. An exception is the recent work of Guerrero Valencia and Arana Araya (2018), who classified former first ladies who had been candidates in popular elections according to their previous political experience. The authors used the comparative area study approach (CAS) to analyze the Latin American evidence combining strong contextual sensitivity expertise with an explicit and systematic comparative approach.

Motivated by the research gaps and the Latin American first ladies' puzzle, this dissertation makes a significant theoretical and empirical contribution to research on elites, executive studies, and first ladies' political participation. Political analysts and journalists often describe the first lady as a mere protocol position within the government. However, I propose that the conventional view has overlooked the strategic role that some first ladies have played in politics and the importance of the institutional support within the institutional presidency. While scholars agree that, over time, the position of the first lady has become more political in the United States (e.g., Burns 2004; Watson 1997), the role has become so politicized in Latin America that it has become a prominent platform to enter the electoral arena.

This dissertation provides novel insights into the political role of first ladies as institutional support within the presidency and in their post-electoral careers. In addition to these theoretical contributions, this dissertation offers the most systematic, empirical study of the offices of the first ladies and the rise of former first ladies' candidacies in Latin America to date. I test my theories with three original databases of observable data from the first ladies of 18 countries between 1990 and 2016. In sum, my research provides a basis for future research focusing on the political role of first ladies and the consequences for the democracy that may be applied to other regional contexts.

### 1.3 Research Question and Operationalization

Each essay included in this dissertation presents more specific information about its own methodology, research question, research design and data. The following section serves to give a general overview of the dissertation.

This dissertation's main research question is as follows: under what conditions do first ladies participate in Latin American politics in the period 1990-2016? Each chapter has a specific research question focused on Latin America. Chapter 2's is how is the office of the first lady structured and which is its level of institutionalization? Chapter 3's question is when do former first ladies run for office? Finally, Chapter 4's is what conditions affect the political capital of a former first lady in elections?

The study follows the field of CAS. In specific, the research follows an intraregional comparative approach, meaning within the context of such research, aspects or phenomena of different geographical entities within a given region are compared (Basedau & Köllner, 2007, p. 111). The comparative area studies can play an essential role in generating generalizations applicable to broader settings and middle-range theory that is both context-sensitive and captures important causal effects (Basedau & Köllner, 2007, p. 114).

Latin America represents a perfect scenario within which to explore the political performance of first ladies. First, the exclusive focus on Latin American countries allows for controlling institutional factors considered determinant in explaining the phenomenon. The presidential system incentivizes the participation of the first lady within the government in combination with the flexibility and informality of new democracies. Second, restricting the analysis to Latin America allows for the use of specific cultural conditions that are not universally comparable with countries outside the region (Jones, 2009, p. 57). Third, Latin America leads the world in former first lady candidates. Former first lady candidates from ideologically diverse parties have run 26 times and elected on 19 occasions. The analysis can also provide evidence for the possible regional diffusion of the candidacies. In sum, intraregional comparisons foster the homogeneity and comparability of cases.

Specifically, this study focuses on the first ladies in 18 Latin American countries: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela. This cross-country analysis aims mainly to improve the understanding of the political role of Latin American first ladies by developing new theoretical perspectives based on empirical observations.

#### *Research designs, Methodology, and Data*

This dissertation is based on multi-methods research (MMR), design, or nested analysis, which combines the statistical analysis of a large sample of cases with the in-depth investigation of one or more cases contained in that sample (Lieberman, 2005, p. 436). Watson (1997, p. 808) pointed out that the study of first ladies faces the same problem as that of presidential scholarship; the field has a small number of cases with a wide variance among the cases. However, Latin American first ladies offer a variety of cases regarding the office and their later political careers.

This thesis combines quantitative research through an index of institutionalization of the office (18 cases) and discrete-time duration models, which allowed me to measure the conditions of political participation of all former first ladies in elections at the cross-country large-N level (LNA) (344 cases) and use a qualitative approach (Qualitative Comparative Analysis [QCA]) through in-depth analysis of the political capital of former first ladies elected in national elections at the small-N level (SNA) (19 cases).

This cumulative thesis is based on the following approach: In the second chapter, I present the original data set. This data set contains the degree of institutionalization of the office of the first lady in each Latin American country per year through the revision of their institutional and legal status using different sources (constitutions, laws, decrees [executive orders] and court decisions). For this section, the unit of analysis is the office of the first lady in 18 Latin American countries. With this information, I defined and operationalized the institutionalization of the political institution that supports the first lady's performance and created an index of institutionalization of the office of the first lady. While typologies order and cluster data according to underlying theory, indices are devices to condense data in a manner to allows us to capture scores for aggregate measures (Pedroza & Palop-García, 2017, p. 167)

The third chapter describes the original data set for the 88 first ladies who were available to run for office in the 133 elections, including personal (political experience, public policy during her term) and contextual variables (popularity of the president, first chance, women in politics [gender quota adopted, the percentage of women in Congress, culture], democracy [level and age], economic [GDP Growth, inflation]). Given that the dependent variables reflect the individual attempts to become elected, and because the hypotheses refer to individual predictors, we estimated discrete-time duration models in which the unit of analysis is first lady-election year (344 cases including presidential and congressional contests) between 1990 and 2016.

Subsequently, in the fourth chapter, I provide illustrative cases as a result of the large-N analysis to carry out a small-N case study using QCA. This methodology provides a logical basis for identifying combinations of causal factors sufficient for an outcome (Mahoney, 2007, p. 135). I chose all cases of elected former first ladies. Rohlfing and Starke (2013, p. 493) suggested that “well-predicted cases are considered suitable for the analysis of causal mechanisms that underlies the estimated cause effects.” This deliberate choice of cases allows me to understand the political capital of former first ladies elected and not elected for executive or legislative posts. Following Lieberman (2005, p. 447), through selecting cases deliberately, the standard benefits of SNA are much more likely to apply, including the ability to gain access to (often highly heterogeneous) data and sensitively analyze, such data with an appropriate degree of contextual background, to make valid comparison across cases.

The potential synergy between comparative area studies and MMR is powerful. Ahram (2013, p. 288) argues in favor of this combination stating that MMR can integrate qualitatively derived, region-specific knowledge with larger cross-national, quantitative analysis in a new form of comparative area studies. From his perspective, the relationship is logical because an invitation to mixing qualitative and quantitative analysis is implicit within the comparative area studies rubric (Ahram, 2011, p. 83).

For each essay in this dissertation, I built a new dataset collected from multiple sources, including (a) archival research, (b) official documents (e.g., constitutions, laws, court decisions, decrees [executive orders], memoranda), (c) presidents’ and first ladies’ websites; (d) first ladies’ public speeches, (e) biographies, (f) published interviews, (g) media outlets, (i) semi-structured experts interviews, and (j) published data sets (World

Values Survey, Educational Attainment Dataset, Polity IV, World Bank Indicators, Executive Approval Project, and the electoral dataset of International Institute for Democracy and Electoral Assistance).

The data of the three new datasets consisted mostly of primary information. However, one limit to conducting an intraregional comparative analysis in Latin America is the availability of relevant data across countries and years. In contrast to the U.S. reality, the lack of presidential libraries and first ladies archives make it difficult to access and collect data. A combination of secondary sources was used to compensate for the weaknesses regarding primary sources in some cases. Secondary sources are mainly media reports. I collected information in Spanish, Portuguese, and English.

## 1.4 Central Concept and Definitions

The chapters present a more specific definition of each concept. For this reason, this section includes a general review and theoretical conceptualization of the central notions. Also, this section presents some particularities and examples of the political participation of Latin American first ladies to stress the importance and relevance of first ladies in politics at the international, regional, and national levels. However, the dissertation only focuses on domestic politics.

### *First Lady*

As outlined in the introduction and literature review, the definition of the role of the first lady remains ambiguous. The first ladyship was not created by any single formal actor, institution, or process. The role is, primarily, a cultural tradition that evolved over time and has gradually been institutionalized within the government (Borrelli, 2001, p. 398).

Since the beginnings of the modern presidency in the United States, the president has always been a married man. Consequently, the president's wife has always been the first lady of the United States. However, this title is not new as the figure of the president's wife has been present since the country's independence. Initially, before the use of the title "first lady," presidential spouses were known by a variety of formalities (Watson, 2000b, p. 10). For example, when newspapers mentioned the first lady, they usually referred to her in connection to her spouse, such as "Lady Washington" or "The President of the United States and his Lady" (Winfield, 1997a, p. 167). While the exact origin of the concept of "the first lady" is unknown, one set of research studies identifies 1877 as the year the title was used for the first time. Proponents of this thesis claim that reporter Mary Clemmer Ames, in an article about Rutherford B. Hayes in the newspaper *The Independent*, referred to Lucy Hayes as "First Lady of the land" in reference to a cross-country trip Mrs. Hayes had taken (Watson, 2000b, p. 10). Others authors argue that the term's origin lies in 1849 at Dolley Madison's funeral when President Zachary Taylor eulogized her as the "First Lady" (Kent, 2010, p. 110). Still other American scholars emphasize that the important fact is not when the concept was used first, but the popularization of the title. They credit a 1911 play by Charles F. Nidlinger, *The First*

*Lady of the Land*, about First Lady Dolley Madison with popularizing the title (Watson, 2000b, p. 10).

The concept of the first lady has been used progressively to describe the wife -in most of the cases- of the president in presidential regimes around the world. However, Latin American politics has seven possible combinations between a president and a first lady: (a) the president is a married man, and the first lady is his wife; (b) the president is a non-married man, and the first lady is his mother, daughter, sister, or anyone appointed to the role<sup>3</sup>; (c) the president is a married woman, and the position is filled by her husband, the “first gentleman”<sup>4</sup>; (d) the president is a non-married woman, and the first lady is her daughter, son, sister, or anyone appointed to the role<sup>5</sup>; (e) irrespective of the gender of the head of government, the position remains or becomes vacant<sup>6</sup>; (f) irrespective of the married presidents’ gender, the president divorces during his or her term and appoints someone else<sup>7</sup>; (g) the president is a married homosexual and appoints his or her wife or husband<sup>8</sup>. In this dissertation, a first lady is the person who has held the position in the national government for at least one year.

<sup>3</sup> Two sisters have been appointed as first lady to a non-married president in Latin American between 1990 and 2016: Rosario Paz Zamora (Bolivia, president Jaime Paz Zamora, 1989-1993), Mercedes Lugo (Paraguay, president Fernando Lugo, 2008-2012). Five daughters have been first ladies: Zulema Menem (Argentina, 1992-1995 and 1995. 1999), Paula Mahuad (Ecuador, 1998-2000), María Dolores Alemán (Nicaragua, 1997-1999), Keiko Fujimori (Peru, 1994-1995, and 1995-2000), and María Gabriela Chávez (Venezuela, 2004-2007 and 2007-2013)

<sup>4</sup> Two husbands have been first gentleman: Néstor Kirchner (Argentina, president Cristina Fernández, 2007-2010), and José María Rico Cueto (Costa Rica, president Laura Chinchilla, 2010-2014).

<sup>5</sup> Non-married woman presidents have appointed as first lady the following: a sister, Ruby Moscoso (Panama, 1999-2004); a daughter, Cristiana Chamorro (Nicaragua, 1990-1997); a son, Sebastián Dávalos (Chile, 2014-2015); and a non-relative, Adriana del Piano (Chile, 2006-2007), María Eugenia Hirmas (Chile, 2007-2010), and Paula Forttes (Chile, 2015-2018).

<sup>6</sup> Seven presidents did not have first ladies during their governments: Cristina Fernández (Argentina, 2007-2011 and 2011-2015), Evo Morales (Bolivia, 2006-2010, 2010-2014, 2014-2019), Itamar Franco (Brazil, 1992-1995), Dilma Rousseff (Brazil, 2015-2016), Oscar Arias (Costa Rica, 2006-2010), Joaquín Balager (Dominican Republic, 1986-1996), Leonel Fernández (Dominican Republic, 1996-2000 and 2004-2008), and Horacio Cartes (Paraguay, 2013-2018),

<sup>7</sup> Three daughters have assumed the role of the first lady after the divorce of their parents: Zulema Menem (Argentina, first lady of the government of Carlos Menem [1991-1995 and 1995-1999]), Keiko Fujimori (Peru, first lady of the Alberto Fujimori’ presidential term [1994-1995 and 1995-2000]), and Maria Gabriela Chávez (Venezuela, first lady of the president Hugo Chávez [2004-2007, and 2007-2013]).

<sup>8</sup> This situation is theoretically possible in countries where homosexual marriage is allowed but has not yet materialized in Latin America.

The role of the first lady has been strongly related to the position of the woman in society. Hoffman (2012, p. 270) pointed out that the first spouse is firmly established in American culture as the partner of the president, an important position, but strictly a feminine supporting character whose talents and accomplishment are expected to complement, not duplicate or overshadow, those of the president. The first spouse plays a vital role in confirming the masculine identity of the president, which is reflected in norms governing the position (Hoffman, 2012, p. 272). In this sense, first ladies also share the characteristics of women in politics who are commonly seen as compassionate, practical, honest, and hard-working, while men are seen as ruthless, ambitious, and tough leaders (Norris, 1997c, p. 9).

Gender bias is evident in the expectations of first lady (Van Wyk, 2017, p. 170). First ladies still tend to be involved in issues associated with women's roles. These are often family issues, such as education, housing, equal pay, children, and family values in general (Hoffman, 2012, p. 271). This prototypical gender construction implies that most issues of her public policies or program are related to women, family, and children. The topics covered by the first lady are connected directly to what is expected from a female politician. As a consequence, the role has been associated with the one of a mother. However, in Latin American societies, motherhood is a potent cultural symbol, reinforced by one of the most influential political institutions, the Catholic Church (Craske, 2013, p. 196).

The press and other politicians frequently analyze the first lady's performance. Her role consists not only of the perceptions of its various occupants, and the accumulated precedents they have established, but also of the perceptions of the various audiences to which the first ladies have played and the elite and popular expectations that have accumulated over time in response to those precedents. (Wekkin, 2000, p. 601). In this sense, first ladies have become public figures whose looks, ideas, and actions receive much public attention and are often considered role models for women, mothers, activists, and even the fashion industry (Wekkin, 2000; Winfield, 1997). In summary, events, the media, public expectations, public opinion polls, and public criticism and approval affect the political climate within which a first lady operates. Each of these aspects of the political climate influences the others (Eksterowicz, 2003, p. 331).

The roles of the first lady are not mutually exclusive. The first lady has diverse functions according to context. This context includes not only domestic, but also global, politics. The next section describes the particularities of Latin American first ladies at different levels of analysis: international, regional, and national.

### **The multilevel political role of Latin American First Ladies**

#### *The international level*

At the international level, the first lady can contribute to a state's foreign policy architecture, promote the president's image and agenda, and promotes a state's bi- and multilateral relations (Van Wyk, 2017, p. 165). First ladies' international political participation is conducted by state visits, public statements in international organizations and other countries, meetings with other first ladies, presidents, and political leaders, and participation in protocol and ceremonial international events.

First ladies became more relevant in politics and began to join forces in international associations. At the worldwide level, the Global First Ladies Alliance works with first ladies and their offices to assist them as they set priorities, identify strategic partners, generate positive impact, and develop lasting legacies.<sup>9</sup> Since 2008, the association has directly advised 42 first ladies (and their offices) on programmatic and policy initiatives.

Erickson and Thomson (2012) defined first lady diplomacy as the performance abroad of an international relations role. They defined performance as an action displayed or acted out before witnesses (e.g., speeches, interviews, photo opportunities) and created a taxonomy of first lady diplomacy roles: escort, aesthete, surrogate, cultural emissary, goodwill ambassador, and social advocate. These roles have three rhetorical functions: the management of presidential credibility, international relationships, and social issues.

The first lady diplomacy appears limited in the escort roles because performances lack empowerment (Erickson & Thomson, 2012, p. 244). For instance, when first ladies usually travel abroad accompanying the president on state visits or international events, they participate only in protocol activities as a presidential partner. Traditionally, foreign

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<sup>9</sup> For more information visit: <http://www.gfla.org/>

travel by first ladies has been categorized as the symbolic representation of the United States (Eksterowicz & Hastedt, 2006, p. 61). This phenomenon is not only valid for first ladies from the US but also first ladies from other countries.

The aesthete role occurs when first ladies bolster a president's political image by performing courtship gestures that enchant foreign officials and the public. Typically, enchanting performances influence audiences by means of feminine charm and grace (Erickson & Thomson, 2012, p. 245). Fashion and gossip magazines reinforce this role.

First ladies adopt the surrogate role when they travel abroad as a president's surrogate at non-political events, ritualized occasions, and ceremonial proceedings (Erickson & Thomson, 2012, p. 246). In this case, the first lady performs the other functions of diplomacy: legal and political representation. For example, Cristina Fernández, first lady of Argentina (2003-2007), traveled alone to Madrid to meet the King of Spain, visit a museum, and participate in a ceremony in memory of the victims of terrorism (EFE, 2007).

First lady cultural performances typically consist of obligatory nods to a host nation's social customs and its influence on the development of civilization. Also, first ladies dutifully participate in cultural rituals often casually reported by the media (Erickson & Thomson, 2012, p. 251). For instance, a first lady can visit an important museum, a house of a well-known figure in the country, or a craft market. For example, Eliane Karp, first lady of Peru (2001-2006), inaugurated an Inca exposition at the National Museum of China, explaining the importance of the pre-Hispanic culture for Peru (La República, 2006). Another example is Luisa Durán, first lady of Chile (2000-2006). She was appointed in 2005 as a global ambassador of the year of the Hans Christian Andersen Foundation. Andersen was a writer and poet from Denmark. The first lady promoted the importance of Andersen as an international cultural icon in Chile (EFE, 2004).

The goodwill ambassador role enables first ladies to signify their concern for a nation and its people. First lady goodwill trips facilitate relationship building with foreign countries by providing them with a symbolic assurance of hope, friendship, and support (Erickson & Thomson, 2012, p. 249). This role is related to the "noblesse oblige" character of the first lady. The first lady can visit charitable and good works organizations, such as orphanages, women institutions, victims of a natural catastrophe, and schools. For

example, Vivian Fernández, first lady of Panama (2004-2009), visited Qatar to ask for support for her program to promote the rights of children with disabilities (La Estrella de Panamá, 2009). Also, she was nominated goodwill ambassador for the right and dignity of children with disabilities of the United Nations International Children's Emergency Fund (UNICEF) (Panamá América, 2008).

Finally, social advocate functions allow first ladies to appeal to foreign audiences in a manner a president may not. Specifically, presidents' wives can hearten third-world voices by encouraging participation in the political process and the formation of public spheres wherein needs, resources, and justice may be addressed (Erickson & Thomson, 2012, p. 252). For example, Margarita Cedeño, first lady of the Dominican Republic (2004-2012), promoted a social activist agenda that challenged nations to adopt reforms to enhance the lives of the powerless, especially in health-related issues. She was nominated ambassador of the Food and Agriculture Organization of the United Nations (FAO) and continental ambassador for the elimination of rubella on the American continent by the Pan-American Health Organization (PAHO) (Balcácer, 2010).

#### *The regional level*

At the regional level, the political participation is similar to the international level but focuses on the region. The particularity in Latin American is the joint activities of regional first ladies. The events involve not only the international relations of two countries but also the relations of all nations in the regions. Latin American first ladies engage in special meetings in the framework of the Community of Latin American and Caribbean States (CELAC), Central America Integration System (SICA), and the Summit of the Americas organized by the Organization of American States (OAS). The regional meetings aim to create consensus among all first ladies to build a collective vision of the region's main problems and identify joint solutions.

First ladies also have their own summit. In 1987, the first lady of Guatemala, Raquel Blandón de Cerezo, organized the first Conference of First Ladies in Central America (*Encuentros de las Primeras Damas Centroamericanas*). The primary objective of the conference was to support the peace process of the region. Table 1 presents the five executed meetings.

**Table 1. List of Conferences of Central American first ladies**

Year	Place	Original Slogan	Translated Slogan
1987	Guatemala	Apoyo al proceso de Paz en la región impulsado por los Presidentes.	Support for the peace process in the region led by the Presidents.
1988	Costa Rica	Menor y violencia armada.	Childhood and armed violence.
1989	El Salvador	Nuestra responsabilidad ante la mujer adolescente.	Our responsibility to adolescent women.
1990	Honduras	El papel de la mujer en la integración de la mujer centroamericana	The role of women in the integration of Central American women
1991	Nicaragua	Mujer, Medio Ambiente y Desarrollo.	Women, Environment, and Development.

Source: Compiled by the author based on Acción de las Primeras Damas (2015)

Based on this background, in 1991, the first ladies organized the first Conference of Latin American and Caribbean First Ladies (*Encuentro Latinoamericano y del Caribe de Primeras Damas*) in Venezuela, which in 1994, was renamed Conference of American First Ladies, Wives, and Representatives of Presidents and Heads of State (*Conferencia de Primeras Damas, Esposas y Representantes de Jefe de Estado y de Gobierno de las Américas*) to include the participation of United States and Canada and have a broad definition of the attendees. According to the Pan American Journal of Public Health (1998, p. 421), the meeting was a forum to discuss the countries' progress in implementing projects and programs on a specific topic and to agree to a program of work that would allow first ladies to support social policies promoted by the governments of their respective countries.

Each meeting had a particular slogan focusing on women, children, the underprivileged, senior citizens, and family topics. The conference ended with an official declaration, summarizing the discussion and action plan. The last conference was held in 2007 in El Salvador. In 2009, the conference should have been organized for the first lady

of Honduras, but the army organized a coup to overthrow the president and sent him into exile. The conference was suspended and never again realized. Table 2 describes the executed meetings.

**Table 2. List of the Americas first ladies' meetings**

<b>Year</b>	<b>Place</b>	<b>Original Slogan</b>	<b>Translated Slogan</b>
1991	Venezuela	Mujer, infancia, juventud y familia	Women, Childhood, Youth, and Family
1992	Colombia	Bienestar de la mujer, infancia, juventud y familia	The welfare of women, children, youth, and family
1993	Costa Rica	Desarrollo integral de la familia	Integral development of family
1994	Saint Lucia	Declaración de Santa Lucía	Declaration of Saint Lucia
1995	Paraguay	Salud y educación de la mujer y de la niñez	Health and education of women and childhood
1996	Bolivia	Los derechos de la mujer y de la niñez en el marco del desarrollo sostenible	The rights of women and childhood in the frame of sustainable development
1997	Panama	Construyamos el futuro de América con derechos humanos y cultura de paz	Let's construct the future of America with human rights and a culture of peace
1998	Chile	América construye hoy los caminos del 2000	America constructs today the ways of 2000
1999	Canada	Mujeres de las Américas: agentes del progreso	Women of the Americas: agents of Change
2001	Ecuador	Adolescentes de las Américas: forjadores de un nuevo milenio	Adolescents of the Americas: forgers of a new millennium
2002	Mexico	Niñez y pobreza	Childhood and poverty
2003	Dominican Republic	Juventud y pobreza	Youth and poverty
2005	Paraguay	Mujer y familia	Women and Family
2007	El Salvador	Construyendo una sociedad para todas las edades	Constructing a society for all ages

Source: Compiled by author

Recently, the Latin American first ladies held thematic meetings focusing on specific problems of the region. In 2000, the Central American first ladies organized the Meeting of First Ladies of Central America, Belize, Panama and Dominican Republic (*Reunión de Primeras Damas de Centroamérica, Belice, Panamá y República Dominicana*). The main topics of these conferences were childhood and teenagers. The executed meetings were in El Salvador (2000), Nicaragua (2001), Guatemala (2002),

Panama (2003), Honduras (2004), Dominican Republic (2006), Guatemala (2007), and Panama (2008). The conferences in Costa Rica (2005) and Belize (2010) were suspended.

Likewise, the Coalition of First Ladies and Women Leaders of Latin American on Women and AIDS was founded in 2006 under the leadership of the first lady of Honduras, Xiomara Castro de Zelaya. The coalition's objective was to promote political commitment and mobilization of regional and national resources to strengthen and enhance HIV prevention, treatment, and care services and reduce the impact of the epidemic on women and girls. The coalition was also concerned about the gaps between genders regarding access to HIV prevention, testing, treatment, and care services.

The cases described demonstrate the importance of the role of the first ladies in Latin America at the regional level. The conferences are shared spaces for discussing and trying to resolve regional problems. The promotion of common policies coincides with the presidential idea of regional organizations like Mercosur (*Mercado Común del Sur*), OAS (Organization of American States), and UNASUR (*Unión de Naciones Suramericanas*).

#### *The national level*

At the domestic level, first ladies can play different roles. As Mayo (2000, p. 588) pointed out, the first lady's role as a social and ceremonial partner to the president has had a significant political impact and become an integral part of the presidential administration. However, throughout the years, first ladies have obtained more functions beyond traditional activities linked only to protocol, thus acquiring considerable influence as policymakers. The policy role implies the direct participation of first ladies in politics. In Latin America, some first ladies influence the national agenda, promoting public policies and programs. As a result, the challenges confronting the first lady multiplied, even as she acquired more staff and resources to facilitate her participation in the public sphere (Borrelli, 2011, p. 22)

A first lady can have support for her performance. For instance, if the first lady adopts a communications strategy that involves extensive international and domestic travel to showcase the administration's policy priorities and accomplishments, the participation on domestic politics will require a corresponding investment in staff and expertise (Borrelli et al., 2017, p. 40). Usually, the office of the first lady supports the

first lady's performance. However, specific administrative variables affect that performance. Erickson and Thomson's (2012, p. 58) study demonstrated that resources could contribute to increased activism, as could the location of the first lady's office near the center of the policy action. However, the level of integration of these resources and personnel with that of the White House Office is most important. Also, a first lady's relationship with other governmental agencies can affect her performance and activism.

A first lady can accumulate political capital through an active performance within the government supported by her office. In this sense, some first ladies have tried to capitalize on the political expertise acquired during the presidential term. In the U.S., recent first ladies have moved their policy work from the White House into the not-for-profit sector (Borrelli et al., 2017, p. 42). This phenomenon also happens in Latin American, where some former first ladies have created their own foundations, worked by international organizations and continued collaborating with social causes. Furthermore, some former first ladies have decided to run for office. Twenty former first ladies ran 26 times in elections between 1990 and 2016. Some had experience as elected politicians and others were candidates without prior political experience (newcomers). The cases suggest that there are two dominant types of former first ladies who run for office: politically inexperienced heiresses and experienced politicians. However, thus far, scholars, pundits, and the media have treated most of these candidates as little more than the "covert reelection" of their husbands. Table 3 presents the candidacies of former first ladies in Latin American elections between 1990 and 2016.

**Table 3. Former first ladies in Latin American elections, 1990-2016**

Country	Name	Term as first lady	Target Office <sup>10</sup>	Candidature	Elected?	Term
Argentina	Hilda "Chiche" González de Duhalde	2002-2003	Deputy	2003	Yes	2003-2005
			Senator	2005	Yes	2005-2011
		2003-2007	President	2007	Yes	2007-2011

<sup>10</sup> I use the term legislator for members of parliament in a unicameral system in order to differentiate between unicameral and bicameral systems although, in some countries, these members of parliament have different titles. For example, the members of the unicameral parliament are called deputies in Venezuela and assembly members in Peru.

	Cristina Fernández de Kirchner		President	2011	Yes	2011-2015
Costa Rica	Gloria Bejarano Almada	1990-1994	Legislator	2010	Yes	2010-2014
	Margarita Penón Góngora	1986-1990	Legislator	2002	Yes	2002-2005
Dominican Republic	Margarita Cedeño de Fernández	2004-2012	Vice president	2012	Yes	2012-2016
			Vice president	2016	Yes	2016-2020
Ecuador	Ximena Bohórquez Romero	2003-2006	Legislator	2007	Yes	2007-2008
Guatemala	Raquel Blandón de Cerezo	1986-1991	Vice president	2011	No	-
	Patricia Escobar de Arzú	1996-2000	President	2011	No	-
	Sandra Torres	2008-2011	President	2015	No	-
Honduras	Xiomara Castro de Zelaya	2006-2009	President	2013	No	-
Nicaragua	María Dolores Alemán	1997-1999	Legislator	2006	Yes	2007-2011
	María Fernanda Flores de Alemán	1999-2002	Legislator	2016	Yes	2017-2022
	Rosario Murillo	1985-1990, 2007-2021	Vice president	2016	Yes	2016-2021
Panama	Marta Linares de Martinelli	2009-2013	Vice president	2014	No	-
Paraguay	Mirta Gusinky	1998-1999	Senator	2013	Yes	2013-2018
	Emilia Alfaro de Franco	2012-2013	Senator	2013	Yes	2013-2018
Peru	Susana Higuchi	1990-1994	Legislator	2000	Yes	2000-2001
			Legislator	2001	Yes	2001-2006

	Keiko Fujimori	1994-2000	Legislator	2006	Yes	2006-2011
			President	2011	No	-
			President	2016	No	-
Uruguay	María Julia Pou	1990-1995	Senator	1999	Yes	2000-2005
	Lucía Topolansky	2010-2015	Senator	2014	Yes	2015-2020

Source: Compiled by the author.

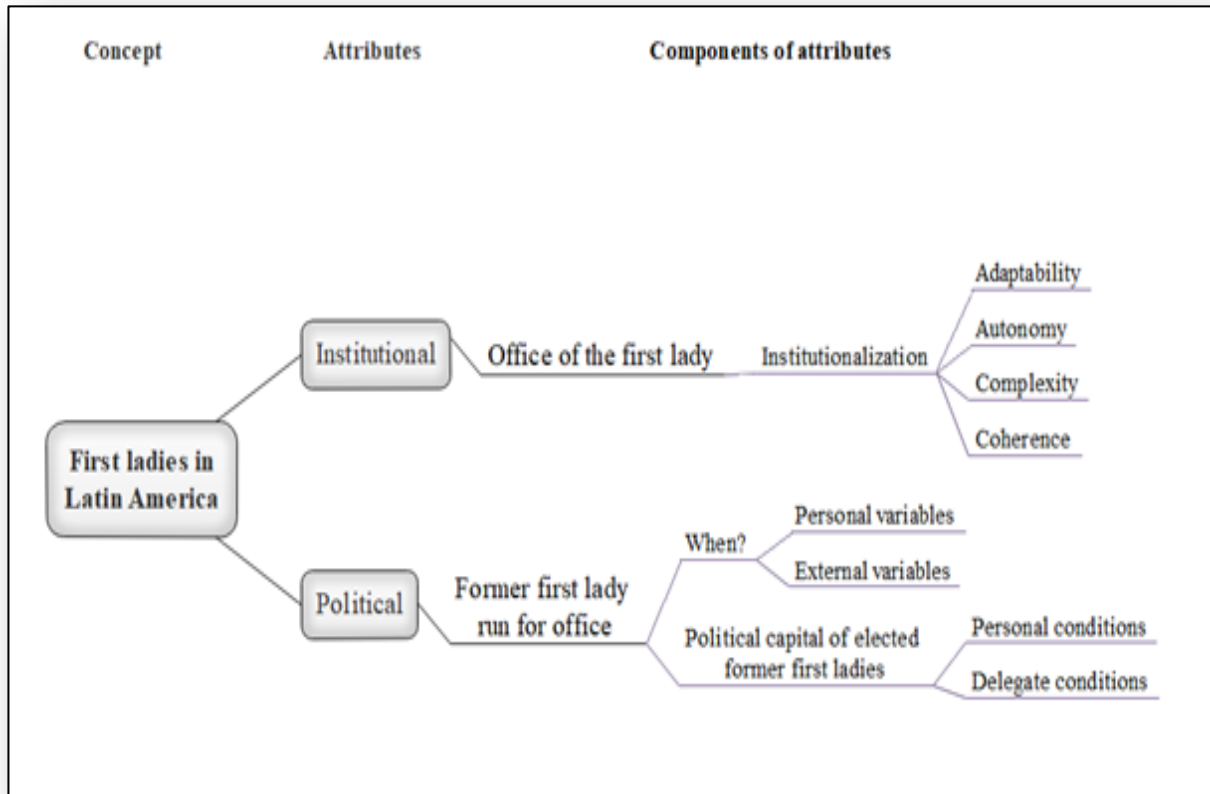
The table reveals several trends. First, the former first ladies have been particularly successful: 19 of the 26 candidates were victorious. This percentage suggests that, as a group, these women are particularly well positioned to access positions of power.

Second, the only former first ladies defeated were those who competed for the executive branch, either the presidency or the vice presidency. The disparity of results between the legislative and presidential elections is not surprising since there is only one available position in the Executive branch. More striking may be the fact that nine former first ladies have presented themselves 12 times to the most important political posts in the country. This suggests that the position of first lady is a platform that allows women to lodge the highest electoral aspirations, and that there are many first ladies with said aspirations.

To close this research gap, the thesis analyses the political career of all former first ladies in Latin America to understand why some of them run for office. The study of the political trajectory of a former first lady examines the connections between the expertise she acquired before she became first lady, the learning and political knowledge she demonstrated throughout her husband's government, and her political career in the post-presidential years.

This dissertation investigates the institutional and political attributes of the first ladies at the national level, as Figure 1 illustrates. The institutional attribute is the office of the first lady and its institutionalization. The political attributes has two components to measure when former first ladies run for office and how is their political capital.

Figure 1. Conceptualization of the First Lady: institutional and political attributes



Source: Compiled by the author

### *The office of the first lady*

As it is necessary to differentiate between the president and the presidency, it is necessary to distinguish between the first lady and the office of the first lady. The first lady refers to an unofficial position usually held by the wife of the president. This post is neither regulated nor accountable (Broyde & Schapiro, 1998; Wasserman, 1995). On the other hand, the office of the first lady refers to the formal agency within the institutional presidency<sup>11</sup> that supports the first lady's performance. The office of the first lady is an

<sup>11</sup> The institutional presidency is the cluster of agencies and advisors that directly support the chief executive in the decision-making processes (Inácio & Llanos, 2015, 2016; Moe, 1993). Other authors named this core executive (Peters et al, 2000), Executive Office of the President (Dickinson, 2005; Ragsdale & Theis, 1997), or the strategic core of the government (Fernández Ramil & Rivera Urrutia, 2012, p. 37).

agency within the institutional presidency that directly supports her performance with its staff, budget, organizational subunits, and tasks.

Scholars of the U.S. office of the first lady (Borrelli et al., 2017; Eksterowicz & Paynter, 2000; Watson, 2000) have documented that the agency provides political and technical support to perform the first lady's roles and to collaborate with the presidential agenda. According to this literature, the office has shown an institutional expansion in organizational, political, and functional aspects.

Some Latin American first ladies also have an office within the institutional presidency. Nevertheless, the office in each country has a different structure, level of formality, and degree of institutionalization. The president has incentive to create, redesign, and modify the office to support the first lady's behavior and choices. The design and institutionalization of the office of the first lady occur as presidential calculus, and involve the management of resources, responsibilities, issues, and relationships with other government institutions and Congress.

The involvement of the first lady and her office in the presidential advisory system depends upon both the president's and the first lady's wishes, interactions, and the organizational structure available to implement these desires. Further, although the first lady's office has become institutionalized, her role is still dependent on personal preferences (Borrelli & Martin, 1997, p. 170). In some cases, the office of the first lady seems to be a fundamental institution within the institutional presidency because it can affect the achievement of the goals proposed by the president.

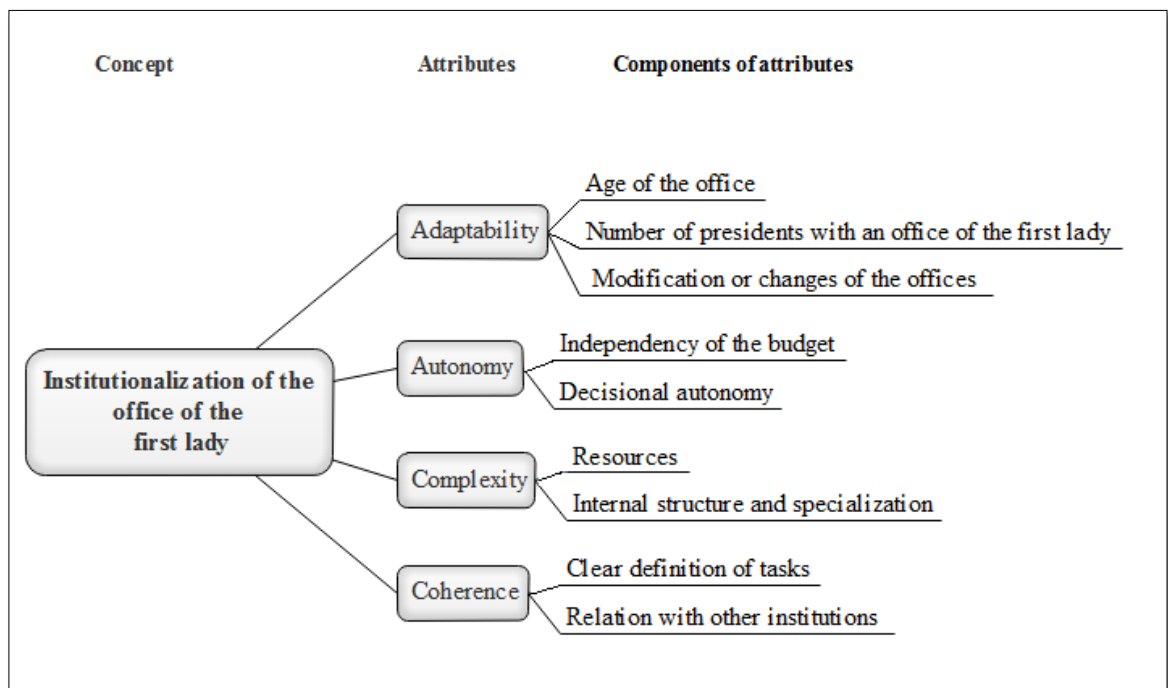
The discussion about the office of the first lady in the United States has been controversial. Some scholars have raised arguments against the office, particularly regarding the lack of accountability and impossibility of impeachment or dismissal of the head of the office (Broyde & Schapiro, 1998; Wasserman, 1995). As Watson (2003, p. 434) summarizes, the office of the first lady is an office but one without portfolio, statutory legitimacy, electoral mandates, or clearly defined roles and responsibilities. Also, the media criticizes the close relationship of the office with the cabinet, Congress, and other politicians. However, others academics highlight the social contribution of the

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first lady and her need for technical support (Borrelli, 2002; Borrelli et al., 2017; Eksterowicz & Paynter, 2000). They argue that the role of the first lady has become more complicated because of added responsibilities and tasks. Therefore, the office of the first lady is the necessary institutional support for the first lady's performance during her husband's governance.

Latin American reality indicates that the institutional support that the first lady receives is both formal and informal. While formal institutions have written and transparent rules, informal institutions rely on socially shared rules, usually unwritten, that are created, communicated, and enforced outside of officially sanctioned channels (Helmke & Levitsky, 2004, p. 727). Similarly, O' Donnell (2006, p. 286) claims that the set of informal rules that constitute an informal institution is *common knowledge*; that is, each actor knows the rules and knows that everyone else, in the relevant context of the interaction, also knows these rules. Formal support implies the existence of an office or secretary within the institutional presidency created by an official document (presidential decree, in most cases) with material and personal resources and a precise definition of functions. However, informal support includes occasional backing from governmental organizations following traditions. Nevertheless, the latter form of support is usually not constant over time.

Chapter 2, "The office of the first lady: Evidence from Latin America, 1990-2014," focuses on the formal offices of the first lady in the region and its institutionalization. Huntington (1968, p. 12) defines institutionalization as the process by which organizations and procedures acquired value and stability and proposed to measure the level of institutionalization by looking at four dual parameters: adaptability-rigidity, complexity-simplicity, autonomy-subordination, and coherence-disunity. This proposal was applied by Ragsdale and Theis (1997) to measure the level of institutionalization of the U.S. presidency. The authors demonstrated that the presidency becomes institutionalized when it attains high levels of four features: autonomy (the independence of the presidency from other units), adaptability (the longevity of units in the presidency), complexity (the differentiation of subunits and staff in the office), and coherence (the manageable volume of work). The logical structure of concept is represented in a tree diagram, presented in Figure 2.

**Figure 2. The concept of the office of the first lady**

Source: Compiled by the author

### *Former first ladies*

Some researchers have systematically analyzed politicians' post-careers. The studies have focused on politicians actions when their appointments end (Alcántara, 2012; Barragán Manjón, 2016; Blondel, 1991; Claveria & Verge, 2015; González-Bustamante & Garrido-Vergara, 2018; Stolz & Fischer, 2014). Alcántara (2012, p. 133) evaluated whether the politicians achieve a return on the political capital accumulated in their political careers.

Alternatively, the politician returns to her or his old job or retires. On the positive side, the politician has a new job relating to politics or transfers her or his capital to another person. This model also applies to first ladies. Despite significant progress in this literature, there has been no comparative analysis of former first ladies' career patterns, partly due to the majority not participating in the public arena after their husbands' mandate.

Some first ladies play an active role in politics during their husbands' presidential terms. Several scholars agree that, over time, the role of first ladies in the United States has become more political (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Page, McClanahan, & Weiss, 2008; Wasserman, 1995; Watson, 1997; Wekkin, 2000; Winfield, 1997). In recent administrations, when the president and first lady have left office at a comparatively young age, planning for the post-presidency has been important both personally and politically. Having been policy advocates and entrepreneurs during the presidential term, the presidential spouses have continued to be issue network leaders after leaving the White House (Borrelli et al., 2017, p. 49).

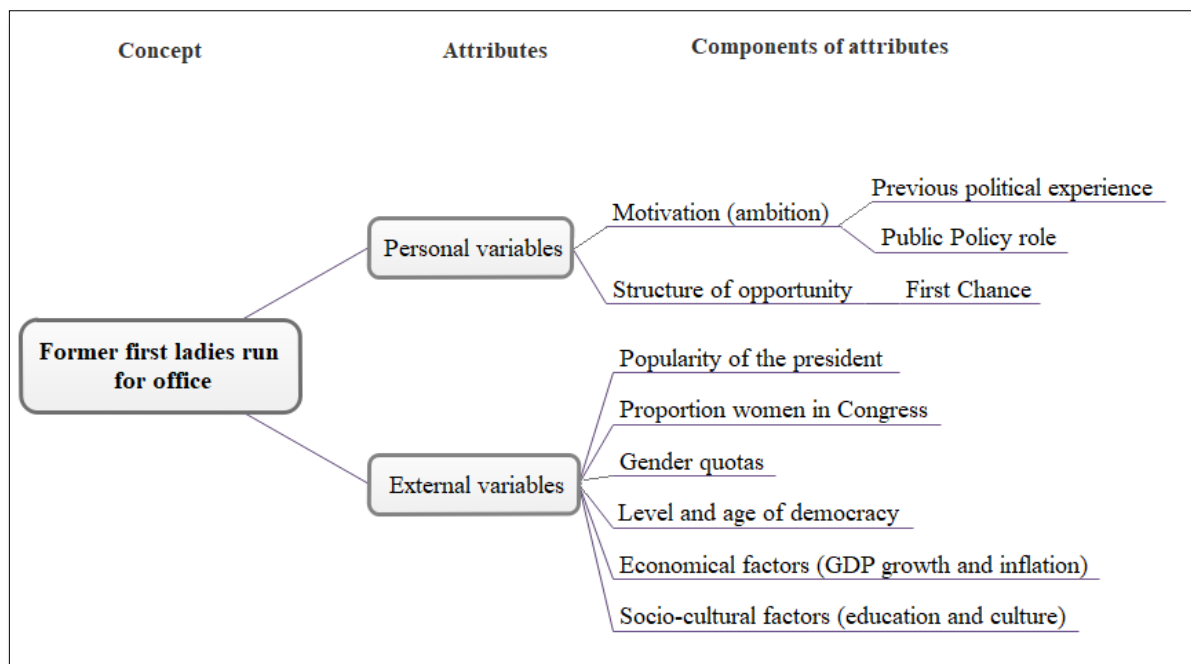
In Latin America, the role of first ladies has become so political that the position itself offers an excellent platform to accumulate political capital and to enter the electoral arena. In the post-presidential years, 20 former first ladies have become candidates. These candidates have become presidents (two times), vice presidents (three), and legislators (eight in unicameral congresses, and five senators and one deputy in bicameral legislatures).

The irruption of former first ladies in the electoral arena is unlikely to be a temporary trend. The move from spouse to candidate seems a logical step for women immersed in the political sphere and who often were drawn there by their own education, interests, and ambitions as much as by any spousal relationship (Anderson, 2002, p. 108).

Former first ladies have entered politics through different paths. Some became candidates only after leaving the executive branch, and their campaigns were explicitly related to the leadership of their husbands or fathers. However, others were already politicians before becoming first ladies. First ladies with experience as elected politicians have demonstrated ambition to compete for political office. Furthermore, their socialization into politics allows them to have confidence in their abilities to develop political careers, and they can enjoy the respect of voters who demand guarantees that they can perform well in elected offices. Presidents' wives with policy knowledge have, therefore, understood the importance of limiting their agenda and clarifying their goals (Borrelli, 2011, p. 30). However, thus far, scholars, pundits, and the media have treated most of these candidates as little more than the "covert reelection" of their husbands. This undifferentiation does not allow us to understand the underlying causes that motivate some first ladies to run for office.

Chapter 3, “When do former first ladies run for office? Lessons from Latin America,” analyses personal and external variables to understand the motivation of former first ladies to continue in politics and run for office. The tree diagram of the concept is illustrated in Figure 3.

**Figure 3. Concept of former first ladies who run for office**



Source: Compiled by the author

### *Political capital*

Like politicians, first ladies accumulate political capital during their tenure within the government. The concept of political capital is frequently used by politicians and journalists when they talk about elites. Each member of the elite has political capital. However, the definition of political capital is still open to debate. Alcántara (2017, p. 191) mentions that the ambiguity of this concept causes severe difficulties in its operationalization and measurement.

Despite multiple definitions, there is a certain consensus that political capital is a set of power resources owned by a politician. For instance, Norris (1997, p. 209) defines political capital as all the assets that facilitate a political career, which vary by party, such

as a record of party service, financial resources, or political networks. Likewise, Joignant (2015) defines the term as a varied set of resources originating both within the political field and outside it. These resources are recognized as valuable by political agents and by those who analyze and comment on political life.

The underlying assumption across political capital studies is that there is not only one type and this type has different sources. Bourdieu (1981, pp. 18–19) describes two types of political capital: personal and delegate. Personal political capital consists of a good reputation, fame, and popularity of a politician for having specific qualifications. In contrast, delegate political capital is a product of a limited and temporary transfer of political capital owned by an institution.

For Alcántara (2012, pp. 125–126), politicians had three elements of capital during their careers: public visibility, negotiation and social skills, and access to political and economic networks. For the first element, the first lady is covered by the media for the whole presidential mandate. As a consequence of the media coverage, the first lady's political impact and public visibility can be much higher than that of ministers, parliamentarians, regional authorities, and even the president. These women's position of high exposure with few responsibilities gives them a chance to become highly popular. For example, polls indicated that Nadine Heredia was more popular than her husband, Peruvian President Ollanta Humala (2011-2016) (Ipsos, 2013). Unfortunately, the popularity polls do not always consider the first lady as a political actor and do not measure her popularity.

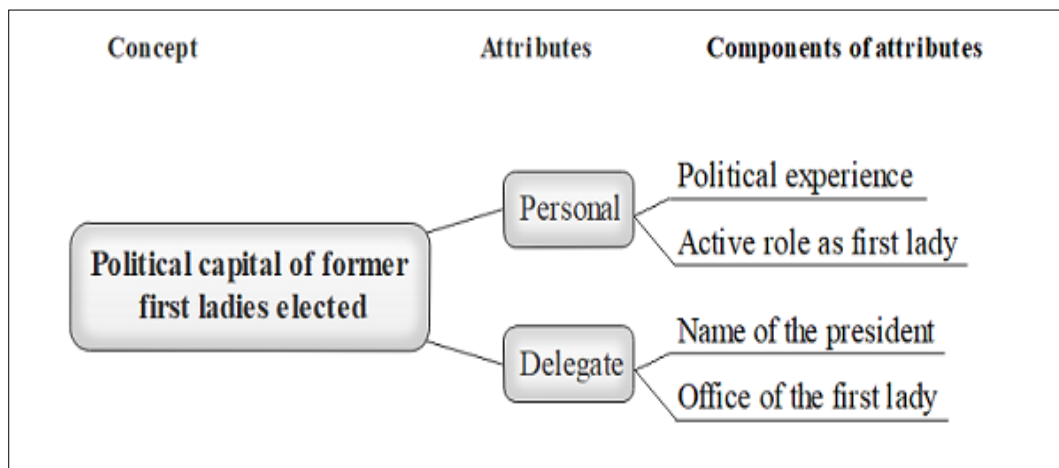
Regarding the second and third elements, the implicit policy role of the first lady is to influence the agenda, promote public policies, interact with politicians and members of the parliament, and acquire political experience. In summary, first ladies, as members of political dynasties, enjoy family name recognition, press coverage, and their husbands' or fathers' political networks (Lee, 2017, p. 379).

Some first ladies use this capital to become candidates in national elections. In this sense, the former first ladies as dynastic politicians might have some advantages over the other candidates. Joignant (2014) analyzed the concept of family political capital in the case of Chile and concluded that the legacy of family capital provides a significant electoral advantage, often decisive for those who benefit from it, skewing the competition

in elections. Lee's (2017, p. 380) study similarly suggested that women who inherited political capital from their family members generally emphasized that connection. For instance, they used the president's name.<sup>12</sup>

Chapter 4, "Political Capital of Elected Former First Ladies in Latin America, 1990-2016," analyzes the conditions that affect the political capital of former first ladies, following the categories proposed by Bourdieu: personal and delegate. The tree diagram of the concept is displayed in Figure 4.

**Figure 4. The concept of the political capital of elected former first ladies**



Source: Compiled by the author

<sup>12</sup> In accordance with Latin American naming conventions, a person's first surname comes from the father and the second from the mother, except in Brazil where is reversed: the first name is from the mother and the second is the father's name. In some countries, a woman may add the name of her husband by adding the suffix "de." Usually, the husband's name comes after the first name. For example, Xiomara Castro Sarmiento (first lady of Honduras 2006-2009) is known as Xiomara Castro de Zelaya. In some cases, first ladies changed their name officially, and in others, the press changed the name.

**Chapter 2: The Office of the First Lady: Evidence  
from Latin America, 1990-2014**

## 2.1 Introduction

The president plays a central role in pure presidential systems in the United States and Latin American countries. Presidents have influential policy-making powers, can influence the legislative agenda, veto a law, allocate portfolios, control the distribution of resources, appoint and dismiss thousands of different government officials and advisors, and respond directly to the demands of citizens (Amorim Neto, 2006; Inácio & Llanos, 2016). The study of presidential power has been a central focus in presidential studies.

Presidents have political and technical support to achieve their agendas. They usually seek support from officials who are appointed as direct advisors and become part of the presidency. In presidential studies literature, the cluster of agencies and advisors that directly support the chief executive in the decision-making processes has been called institutional presidency (Inácio & Llanos, 2015, 2016; Moe, 1993), core executive (Peters et al, 2000), executive office of the president (Dickinson, 2005; Ragsdale & Theis, 1997) or the strategic core of the government (Fernández Ramil & Rivera Urrutia, 2012, p. 37). These agencies and advisors are part of the governmental bureaucracy working under the direct authority of the president and are independent of the executive cabinet.

In some cases, the first lady is one of these presidential advisors and has a particular office inside the institutional presidency. For example, in the United States of America, the president's spouse is the chief of a unit within the White House Office, which has historically been identified as the office of the first lady. Since the Presidency of Jimmy Carter (1977-1981), the budget of this office is fully integrated into the budget for the White House, a requirement of the 1978 White House Personnel Authorization Act (Public Law 95-750) (M. A. Borrelli et al., 2017). In Latin America, 11 of 18 countries have had an office of the first lady. The wave of creation began after 1990, coinciding with the return of democracy in some Latin American countries.

The structure and power of the office of the first lady are different in every country, and the degree of institutionalization varies widely. In the Dominican Republic, for example, the office of the first lady, created in 2000, is relatively new. Moreover, the office's head exercised substantial influence in the policymaking process and setting the president's agenda. For instance, the office of the first lady has more resources than some

ministries. The budget of the office of the first lady in 2010 was \$USD 19,590,767, and the budget of ministry of women's affairs was \$USD 9,429,782 (Benito Sánchez, 2015, p. 65).

As it is necessary to differentiate between the president and the presidency, it is also necessary to distinguish between the first lady and the office of the first lady. The first lady refers to an unofficial position usually held by the wife of the president<sup>13</sup>. This position is neither regulated nor subject to accountability (Broyde & Schapiro, 1998; Wasserman, 1995). However, the office of the first lady refers to the formal agency within the institutional presidency that supports the first lady's performance. The office of the first lady is an agency within the institutional presidency that directly supports her performance with its staff, budget, organizational subunits, and tasks. The office in each country has a different structure, level of formality, and degree of institutionalization.

The study of the institutional development of the office of the first lady with a comparative approach is relevant for several reasons. First, first ladies are not fully vertically and horizontally accountable for their actions (Broyde & Schapiro, 1998; Wasserman, 1995). Usually, the working area of first ladies is not regulated, which implies that their role is not officially explained or formalized. The absence of accountability and responsiveness of the first lady raise questions about the legitimacy and legal status of the role.

Second, the office of the first lady might lead to institutional problems in the government, such as coordination, efficiency, and transparency. For instance, the structure and budget of the office of the first lady within the institutional presidency can affect the coordination of the cabinet. Also, the office can handle considerable money and resources to promote public policies. As the office does not have a specific topic, it can overlap issues of other agencies, such as the ministry or office of women's affairs, social services, and children. The topic's overlap generates inefficient use of public resources and duplicity of tasks. Furthermore, the majority of the offices are allowed to receive

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<sup>13</sup> In some Latin American cases, the first lady was the daughter, mother, sister, son, or another relative of the president when the president is single, divorced, or a woman. In this paper, however, the first lady is assumed to be female and addressed as a "she" given the fact that the "traditional" first lady as wife of a male president is by far the most frequent occurrence.

private donations. The lack of transparency of the contributions increases the risk of corruption and bribery.

Third, the office of the first lady is an unappreciated area of research and an exciting topic for future executive literature. Moreover, political scientists have generated limited systematic studies, considering only U.S. reality of the first lady and her office. This study creates new lines of research and provides a new framework based on comparative, context-sensitive empirical evidence.

Throughout the years, first ladies have obtained new tasks beyond the traditional activities linked only to the protocol, thus acquiring greater influence as policymakers. In this respect, in the international arena, they represent the government in foreign travels, sign agreements with other countries, and participate in presidential summits. Regarding domestic politics, they have shaped their own office, have websites associated with the presidency, promote policies and programs, and influence the presidential agenda. For the United States, Borrelli et al. (2017, p. 27) point out that, especially in recent presidencies, presidential spouses have been asked to complete more diverse, numerous, and difficult tasks. For this reason, the office has become more critical over time, providing for all the activities of a first lady's technical, logistical, political, and communication support.

In some cases, the office of the first lady seems to be an essential institution within the institutional presidency because it can affect the achievement of the goals proposed by the president. Therefore, the president has incentives to create, redesign, and modify the office to support the first lady's behavior and choices. The design and institutionalization of the office of the first lady occur as presidential calculus, involving the management of resources, responsibilities, issues, and relationships with other government institutions and Congress.

Despite the importance that first ladies have gained, their role has mostly been ignored by political scientists, internationalists, and sociologists (O'Connor et al., 1996; Watson, 2003). Most importantly, there has been no comparative analysis of the institutional support of the first lady within the presidency in Latin America. This research aims to close the knowledge gap with an empirical approach by undertaking the first steps for a comparative study of Latin American offices of the first ladies. This chapter

endeavors to further the analysis of comparative presidency-related studies by focusing on the structure of the formal office of the first lady within the institutional presidency in Latin America and its level of institutionalization.

To understand the office of the first lady's structure and level of institutionalization, the study follows specialized literature on institutional presidency and the framework for the institutionalization of the presidency proposed by Huntington (1968) and applied to the presidency of the United States by Ragsdale and Theis (1997). To enable research on the office, I created an original data set that divides the information of each office into the four dimensions (adaptability, complexity, autonomy, and coherence). In particular, the study explores the structure and changes of the office of the first lady in 18 Latin American countries and identifies its strengths and weaknesses. On this basis, this paper presents an index of institutionalization of the formal office of the first lady in Latin America for the period 1990-2014. I focused on the office and its institutional evolution, not on the position of the first lady and her style.

The paper is organized as follows: The section following this introduction presents the theoretical framework while section three deals with the methodology and data. Part four provides the results obtained from the empirical research on the level of institutionalization across the dimensions of autonomy, adaptability, complexity, and coherence in each country. Additionally, from a comparative perspective, an Index of Institutionalization of the office of the first lady is presented. Section five offers a conclusions and suggests the inclusion of the study of first ladies in the agenda of presidential studies in Latin America.

## **2.2 Literature Review**

In the last decades, the literature on presidential systems has increased but mostly analyzes the relationship between institutional design and democratic stability (Amorim Neto, 2006, p. 415). The study of the presidential office is relatively new. Ragsdale and Theis (1997, p. 1285) pointed out that this is due to a lack of differentiation between the president and the presidency. In addition, the presidential office was not considered an organization by itself. In the same way, Inácio and Llanos (2015, p. 40) stressed that, in

Latin America, the distinction between executive leadership and the institutional nature of the modern presidency had not yet been adequately addressed.

Scholars have studied the U.S. presidency from an institutional perspective (Burke, 1992; Hart, 1995; Kessel, 1984; Moe, 1993; Walcott & Hult, 1995), examining the presidency from a historical perspective and observing the structures, incentives, and resources of the office. In this regards, Krause and Cohen (2000, p. 88) mentioned that the development of the institutional presidency is an important consideration in understanding presidential behavior, which will reflect opportunity more than constraints as president are able to exploit burgeoning institutionalization.

The literature on institutional presidency in the United States, particularly the research on its institutionalization, analyzes the historical evolution of the agencies to establish the office's point of origin as an institution. The broad definition of institutionalized organizations considers permanent staff and regular routines. Dickinson and Lebo (2007, p. 208) pointed out more elaborate descriptions involving internal hierarchy, functional complexity, subunit autonomy, and differentiation from the surrounding environment. Furthermore, Ragsdale and Theis (1997, p. 1280) added that the institutionalization of the presidency involves the process by which the office as an organization attains stability and value as an end in itself.

Huntington (1968, p. 12) defined institutionalization as the process by which organizations and procedures acquire value and stability and proposed measuring the level of institutionalization by examining four dual parameters: adaptability-rigidity, complexity-simplicity, autonomy-subordination, and coherence-disunity. Ragsdale and Theis (1997) applied these categories to measure the level of institutionalization of the U.S. presidency. They found that the presidency becomes institutionalized when it attains high levels of four features: autonomy (the independence of the presidency from other units), adaptability (the longevity of units in the presidency), complexity (the differentiation of subunits and staff in the office), and coherence (the manageable volume of work).

The specialized studies on institutional presidency explore the variables that affect its expansion and the changes after it has been institutionalized. The researchers mainly focused on how and why the institutional presidency has changed. However, there is no

consensus for “why.” Inácio and Llanos (2016, p. 533) identified three prominent explanations for the emergence and growth of the institutional presidency: increased government responsibilities, the reassertion of presidential leadership vis-à-vis the political environment (Congress and the general public), and more astute management of cabinet politics.

Authors of the first theory relate the expansion of the institutional presidency to the increase of the president’s responsibilities. According to this literature, the presidents have faced more social and economic challenges during this time. To manage these new tasks, presidents have increased the number of agencies under their umbrella. Supporters of this explanation are Ragsdale and Theis (1997). Their article the institutionalization of the White House Office was later achieved (in the 1970s) and that the growth of the institutional presidency responds to the increase of responsibilities and presidential workload instead of personal styles or political conditions.

The second theory indicates that the extension of the institutional presidency is explained by the strengthening of the president’s relationship with the parliament, media, and citizens to implement his agenda. Exponents of this explanation are Dickinson and Lebo (2007). They analyzed the growth of staff at the White House Office (WHO) and the Executive Office of the President (EOP) and found presidential staff growth is driven primarily by changes in the president’s bargaining relations with Congress, the media, and the public and only secondarily by a general growth in the government’s responsibilities. Likewise, Moe and Howell (1999, p. 871) demonstrated that presidents have incentives to expand their institutional power, and they operate within a formal governance structure with pervasive ambiguities that—combined with the advantages inherent in the executive nature of the job—give them countless opportunities to move unilaterally into new territory, claim new powers, and make policy on their own authority.

The third explanation analyzes the formal and informal powers of the president to manage the cabinet. Inácio and Llanos (2015) presented the first effort to explain the expansion of presidential agencies focusing on six Latin American cases since the last wave of democratization. The article introduced a new presidential tool: the strategic redesign of the institutional presidency. The authors’ found that the expansion in the number of presidential agencies is a deliberate response to situations of conflict or weakness and introduced a new explanatory variable to the analysis: the type of

government (coalition or single-party). Specifically, their study found that the kind of government, operationalized as the number of cabinet parties, impacts the size of the presidency. Inácio and Llanos (2015, p. 47) pointed out that changes in the structures of the institutional presidency imply that some agencies survive several different administrations and become stable components of the presidency, while others are soon abolished or, more often, are moved to other areas of the executive branch.

Similar organizations in other countries can inspire the creation and modification of an institution. This phenomenon, recently studied in international organizations, is called institutional borrowing (Levitsky & Murillo, 2013) or institutional diffusion (Jetschke & Lenz, 2013; Ovodenko & Keohane, 2012). Ovodenko and Keohane (2012) claimed that institutional diffusion entails three distinct elements: (1) similarity of form or practice, (2) a temporal sequence between the point of origin and the point of adoption, and (3) a process by which the innovation is applied in a new setting. Therefore, institutional diffusion refers to a causal and temporal relationship between similarly designed institutions, not merely to the institutional similarity alone.

The historical and cultural context could influence the design of the institutional presidency. Yesilkagit and Christensen (2010, p. 54) recommended observing the potential impact of national historical legacies and political-administrative cultures on the politics of institutional design. They suggest that factors such as national administrative context, traditions, styles, and historical trajectories should become integrated into models of agency design.

The staff of the institutional presidency also changes. Usually, the office has a permanent member of the team for regularized processes, and the team is a combination of people with bureaucratic and political expertise. However, the president has the faculty to nominate new people for all jobs and create new temporary positions for specific tasks. In this regard, Dickinson (2005) pointed out that the president faces the paradox of politicization: by recruiting presidential supporters on the basis of political loyalty, the presidency usually loses administrative effectiveness.

The design of the institutional presidency involves decision on what agencies are created under the presidential umbrella. In some countries, the first lady has an agency within the institutional presidency: the office of the first lady. Scholar of the U.S office

of the first lady (Borrelli et al., 2017; Eksterowicz & Paynter, 2000; Watson, 2000) have documented that the office provides political and technical support to perform the first lady's roles and to collaborate with the presidential agenda. According to this literature, the office has had an organizational, political, and functional institutional expansion. Borrelli et al. (2017, p. 33) interviewed members the office of the first lady's staff in the United States across administrations and identified three explanations for the organization and reorganization of the institution: in response to functional and political demands made by (a) the West Wing (president's office), (b) presidential and congressional campaign organizations, and (c) the first ladies. The explanations coincide with the interpretation of the emergence and growth of the institutional presidency. Despite some progress in this literature, an exhaustive analysis of the variables of the growth and changes in the office of the first lady, as for the institutional presidency, remain under-researched, even for the US.

In the United States, regarding subordination, the office of the first lady is formally a unit in the White House Office, but it has manifested a distinctive mixture of independence from and dependence on other White House Office units (Borrelli et al., 2017, p. 29). The office of the first lady maintains close ties with the president's office to coordinate joint activities. Broyde and Schapiro (1998, p. 494) criticized the confusion between authority and dependence of the first lady's office, pointing out the senior officials in the office of the first lady are technically assistants to the president.

The first lady, as chief of her office, appoints her staff. Over time, first ladies have determined that specific staffing posts and structures are required if they are to perform their duties (Borrelli et al., 2017, p. 33). The literature on the U.S. reality has suggested that the composition and tasks of the staff have changed over the decades. According to this literature, staff responsibilities have become more specialized and departmentalized (Borrelli et al., 2017, p. 1). In particular, Eksterowicz and Paynter (2000) determined the historical evolution of the first lady's office in the direction of professionalization and integration with the president's office.

The design and redesign of the office of the first lady in the United States involve the creation or expansion of some units. Borrelli et al. (2017, p. 27) called attention to the visibility of these changes. They mentioned that, in more recent administrations, first ladies exercised significant discretion in making their personnel decisions, creating

offices that were distinctively suited to their priorities and practices. The influence of the first lady on the office and vice versa is significant. Eksterowicz and Paynter (2000) demonstrated that activist first ladies had a profound impact upon the working of their offices.

Finally, the discussion about the office of the first lady in the United States has been controversial. Some scholars have raised arguments against the office, particularly regarding its lack of accountability and the impossibility of impeachment or dismissal of the head of the office (Broyde & Schapiro, 1998; Wasserman, 1995). As Watson (2003, p. 434) summarizes, the office of the first lady is an office but one without portfolio, statutory legitimacy, electoral mandates, or explicitly defined roles and responsibilities. Also, the media criticizes the close relationship of the office with the cabinet, Congress, and other politicians.

However, others academics highlight the social contribution of the first lady and her need for technical support (Borrelli, 2002b; Borrelli et al., 2017; Eksterowicz & Paynter, 2000). They argue that the role of the first lady has become more complicated through her added responsibilities and tasks. Therefore, the office of the first lady is the necessary institutional support for the first lady's performance during her husband's governance.

### **2.3 The Office of the First Lady in Latin American Countries**

The involvement of the first lady and her office in the presidential advisory system depends upon the president's and the first lady's wishes, their interaction, and the organizational structure available to implement these desires. Although the first lady's office has become institutionalized, her role is still dependent on personal preferences. (Borrelli & Martin, 1997, p. 170). In some cases, the office of the first lady seems to be an essential institution within the institutional presidency because it can affect the achievement of the goals proposed by the president. In other cases, the office of the first lady does not exist legally, and support remains informal.

The institutional support that the first lady receives may be formal or informal. While formal institutions have written and clear rules, informal institutions rely on socially shared rules, usually unwritten, that are created, communicated, and enforced

outside of officially sanctioned channels (Helmke & Levitsky, 2004, p. 727). Similarly, O' Donnell (2006, p. 286) claimed that the set of informal rules that constitute an informal institution is common knowledge; that is, each actor knows the rules and knows that everyone else, in the relevant context of the interaction, also knows these rules.

The support of the first lady in Latin American countries can be divided into four categories detailing its dependency (institutional presidency/government [outside of the institutional presidency] and formality [formal or informal]): (a) office or secretary within the institutional presidency, (b) office within the government, (c) informal support of the president's staff, and (d) no formal office

**Table 4. Classification of the office of the first lady**

<b>Dependency</b> <b>Formality</b>	<b>Institutional presidency</b>	<b>Government</b>
<b>Formal office</b>	Office or secretary of the first lady	Office within the government
<b>Informal office</b>	Informal support of the president's staff	No formal office

Source: Compiled by the author

Formal support implies the existence of an office or secretary within the institutional presidency created by an official document (executive orders or presidential decree, in most cases) with material and personal resources and a precise definition of functions.

Theoretically, an office within the institutional presidency indicates a simple structural design with a specific mission. Conversely, a secretary within the institutional presidency should have a sophisticated design with different tasks, a relatively large number of staff, and a sufficient budget. However, not all Latin American countries follow the same nomenclature in institutional design. The lack of consensus about the name of the office and the hierarchies could lead to a misinterpretation of the real structure of the office and its position within the institutional presidency. In some cases, an office

is as sophisticated as a secretary. Therefore, an office and a secretary are considered the same unit of analysis because both depend directly on the president.

The first lady could have an office within the government. The office is not directly dependent on the president but is part of the government similar to other agencies or ministries. For instance, the office could be a foundation within a ministry. The foundation would be a specific project more than direct support to the first lady's activities. The staff would work for the foundation and not for the first lady. However, the foundation would be a formal office and receive public funds.

In contrast, informal support refers to occasional, traditional backing from the president's staff. The institutional presidency provides temporary assistance for specific activities. For instance, when the first lady travels with the president, the presidential staff is concerned with her agenda, official meetings, and press conferences.

Finally, the first lady can have occasional assistance from other governmental institutions without having a particular office. The non-existence of a formal office does not mean that the first lady does not have a significant role in the political arena nor that she does not receive political or technical support. Most first ladies without an office have played the ceremonial and protocol roles and some even promoted policies. The non-formalization of the office is a multidimensional phenomenon responding to cultural, ideological, circumstantial, and domestic factors.

Table 5 presents a general overview of the status of the agency in Latin American countries.

**Table 5. Classification of the office of the first lady according to the agency's status**

<b>Types of the office of the first lady in Latin America</b>	<b>Countries</b>	<b>Original name of the offices</b>
Office or secretary within the Institutional Presidency	Bolivia	<i>Despacho de la Primera Dama</i>
	Chile	<i>Gabinete de la Primera Dama / Dirección Sociocultural de la Presidencia</i>
	Colombia	<i>Despacho de la Primera Dama</i>
	Costa Rica	<i>Despacho de la Primera Dama</i>
	Dominican Republic	<i>Despacho de la Primera Dama</i>
	El Salvador	<i>Despacho de la Primera Dama</i>
	Honduras	<i>Despacho de la Primera Dama</i>
	Perú	<i>Despacho de la Primera Dama</i>
	Paraguay	<i>Despacho de la Primera Dama</i>
	Guatemala	<i>Secretaria de Obras Sociales de la esposa del Presidente (SOSEP)</i>
	Panama	<i>Secretaria de coordinación de asuntos comunitarios.</i>
Foundation as part of a ministry	México	<i>Sistema Nacional para el Desarrollo Integral de la Familia (SNDIF)</i>
	Venezuela <sup>14</sup>	<i>Fundación del Niño / Fundación del Niño Simón</i>
No formal office or formal support	Argentina	-
	Brazil	-
	Ecuador	-
	Nicaragua	-
	Uruguay	-

Source: Compiled by the author

<sup>14</sup> In 2013 the foundation was moved from the Ministry of Education to the institutional presidency.

The situation in the 18 Latin American countries in 2014 was as follows: 11 countries (Bolivia, Chile, Colombia, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Paraguay, Panama, and Peru) had an office or a secretary of the first lady within the institutional presidency created by an executive order. Five countries (Argentina, Brazil, Ecuador, Nicaragua, and Uruguay) did not have a formal office, and two countries (Mexico and Venezuela) had a foundation within a ministry. However, the classification is not static because some offices were abolished or have changed over time. For instance, Colombia and Paraguay eliminated the office of the first lady for different reasons.

In 1994, the Constitutional Court of Colombia, through the judgment C-089A/94, abolished the office of the first lady. The court noted that the first lady was a private citizen within the public administration. However, according to article 188 of the Constitution, the first lady symbolically embodies the president of the republic the national unity. The court added that the first lady could continue to perform all activities generally associated with her as the spouse of the president of the republic, working with him in the performance of ceremonial duties, initiating social assistance, working with public charity, or engaging similar activities, which had long been a noble tradition in Colombia. Without this tradition, it would have been necessary to create an administrative dependency, with all implied financial, material, and human resources within the Presidency of the Republic (Corte Constitucional de Colombia, 1994).

In Paraguay, President Horacio Cartes (2013-2018) closed the office of the first lady and redistributed the budget in 2013 mainly because his ex-wife, Margarita Montana, wanted to be the first lady. She argued that they were not officially divorced, that their separation was just a *de facto* situation, and as his legal wife she had the right to be the first lady of Paraguay. The presidential decree 243 (2013) abolished the office, indicating that the general secretary and headquarters of the Civil Office would take charge of the national and international agreements signed by the office of the first lady that implied obligations for the State.

Some countries without formal offices illustrate their particular situations. For example, Argentina has a long tradition of influential first ladies. The most exemplary case is Eva Perón (first lady of Juan Domingo Perón, 1946-1952), who is an icon in Argentinian politics. She was extremely popular and promoted public policies, such as

voting rights for women. As first lady, Eva Perón is the first in the position in Latin America who played an influential role in domestic and international politics. Despite their long tradition and active role in Argentinian politics, first ladies do not have an official office in Argentina. In Brazil, the most recognized first lady is Ruth Cardoso (first lady of president Fernando Henrique Cardoso, 1995-2003), who promoted the public policy “Solidarity Community” (*Comunidade Solidária*). Technical and political support was given to her directly by the Casa Civil within the Institutional Presidency. Conversely, President Rafael Correa (married to Anne Malherbe from Belgium) of Ecuador said, in 2007, that the first lady is a sexist and democratically illegitimate position because she is not elected. In Nicaragua, the actual first lady, Rosario Murillo (married to President Daniel Ortega 1985-1990; 2007-2016), is the head of Council of Communication and Citizenship (*Consejo de Comunicación y Ciudadanía*) and is also the official spokesperson for the government. However, the fact she holds these two positions is circumstantial as any other person might have been appointed by the President. Likewise, some first ladies in Uruguay have promoted programs with the support of other ministries or the presidency. In the few last years, the first lady Lucía Topolansky (first lady of president José Mujica, 2010-2015), was the most voted Senator and did not use the position of the first lady.

The foundations chaired by the first ladies in Mexico and Venezuela were created before the period covered by this study (1977 and 1975, respectively). These foundations do not support the performance of the first lady directly but instead help her promote the implementation of social programs. The president of Venezuela changed the dependency of the foundation from the Ministry of Education to the institutional presidency through presidential decree 506 (25/10/2013). However, the head of the foundation is now an official appointed by the president and not necessarily the first lady.

In conclusion, these categories of the offices describe the office of the first lady in Latin America. The classification regarding the dependency the first lady on formal support is not enough to draw inferences about the real assistance and power resources that the first lady has within the government. However, this classification allows for the identification of those countries with a formal office or a secretary to measure their level of institutionalization and exclude those without an office or with a foundation with other functions in the government unrelated to the institutional presidency. Therefore, the cases

of Argentina, Brazil, Ecuador, Mexico, Nicaragua, Uruguay, and Venezuela will not be analyzed in more detail due to the lack of a formal agency supporting the first lady.

## 2.4 Data and Methodology

This study follows an intra-regional comparative approach, which means within the context of such research, aspects or phenomena of different geographical entities within a given region are compared (Basedau & Kollner, 2007, p. 111). Specifically, this study focuses on the formal offices of the first lady in 11 Latin American countries: Bolivia, Chile, Colombia, Costa Rica, Dominican Republic, El Salvador, Guatemala, Honduras, Panama, Paraguay, and Peru. The study provides a cross-country comparison using empirical data for a theory building model of a regional schema.

This chapter presents an index of institutionalization of the formal office of the first lady in Latin America for the period 1990-2014. The research follows the method proposed by Huntington (1968) and applied to the presidency of the United States by Ragsdale and Theis (1997). The study considers four dimensions: adaptability, complexity, autonomy, and coherence. Each dimension has multiple indicators. All indicators were converted into a five-scale coding system from 1 to 5. In every case, the indicator value 1 presents the lowest level of institutionalization and 5 the highest. Table 6 provides detailed information on coding and operationalization.

**Table 6. Codebook of the index of institutionalization of the office of the first lady in Latin America, 1990-2014**

Dimension	Criteria	Indicator/ operationalization	Source	Score	
Adaptability (25%)	High office age (15%)	Duration of the office in years as a percentage of the period under investigation (1990- 2014=24 years)	Decree of creation and derogation (if applicable)	1	0-20
				2	21-40
				3	41-60
				4	61-80
				5	81-100
	High number of presidents with an	Percentage of presidents that the office survived since its foundation	Own data set	1	0-20
2				21-40	
3				61-80	

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	Office of the first lady (5%)			4 61-80 5 81-100
	High number of changes (5%)	Number of changes in the office since the foundation of the office as a percentage of the maximum number of changes (maximum=4)	Decree of modification	1 0-20 2 21-40 3 61-80 4 61-80 5 81-100
Complexity (25%)	High level of resources (10%)	The office has considerable resources such as employees, offices, and funds.	Qualitative assessment	1 Few 2 - 3 Some 4 - 5 Many
	High level of division of labor and specialization (15%)	Internal structure: Number of subunits as percentage of maximal number of units of an office of the First Lady in one country (maximum=33)	Decree of creation and modification	1 0-20 2 21-40 3 41-60 4 61-80 5 81-100
Autonomy (25%)	Public funds (15%)	Independency of the budget: public funds and/or private donations	Decree of creation	1 Private donations 2 - 3 Private donations and public funds 4 - 5 Public funds
	High level of decisional autonomy (10%)	The office can decide on programmatic and personnel matters largely independently from the president	Qualitative assessment According to the decree of creation and the press	1 Very dependent 2 Dependent 3 Partially dependent or opaque 4 Independent

				5	Very independent
Coherence (25%)	Clear definition of tasks (15%)	Issues are divided into protocol, social and policy	Qualitative assessment According to the mission of the office	1	one of the three categories
				2	-
				3	two of the three categories
				4	-
				5	All three categories
	Tolerance of the office and relations with other institutions (10%)	Relations with other governmental institutions and institutions of the civil societies. They tolerate the office by coordinating activities, agenda, and meetings.	Qualitative assessment According to the press and public speeches	1	Criticized
2				No relations	
3				Some relations	
4				Good relations	
5				Close relations	

Source: Compiled by the author

The index proposes a useful tool to compare a broad spectrum of offices between countries. While typologies order and cluster data according to underlying theory, indices are devices to condense data in a manner to allows us to capture scores for aggregate measures (Pedroza & Palop-García, 2017, p. 167)

An intraregional comparative analysis in Latin America is limited by the availability of relevant data across countries and years. The main problem is the different level of access to information between countries and the systematization of it.

In some cases, data is unavailable or difficult to obtain. The following primary sources were used to construct a data set: (a) official documents of the government (constitutions, laws, court decisions, presidential decrees, executive orders, and memos), (b) official websites of the president and the First Lady, and (c) public speeches. Additionally, these secondary sources were used: (a) literature from books, magazine articles, or academic papers on the subject and (b) the media. A combination of these

secondary sources was used to compensate for the weaknesses regarding primary sources in some cases.

## **2.5 Institutionalization of the Office of the First Lady in Latin America**

Following Ragsdale and Theis (1997), the presidency becomes institutionalized when it attains high levels of four features: autonomy (the independence of the presidency from other units), adaptability (the longevity of units in the presidency), complexity (the differentiation of subunits and staff in the office), and coherence (the manageable volume of work). In this section, I present the analysis of the four dimensions (adaptability, complexity, autonomy, and coherence) for the offices.

### **2.5.1. Adaptability**

The design of the institutional presidency is an executive prerogative. In some countries, this design is uncomplicated, and the president can easily add or subtract units. The changes are associated foremost with the issuance of presidential decrees or internal documents of the presidency that do not need external revision or approval. Otherwise, the president needs to change a law.

The office of the first lady, like all agencies within the institutional presidency, should be created and can be modified or abolished by the president. The context of the creation of an institution impacts the design and characteristics of that institution. Levitsky and Murillo (2013) described five factors in Latin America that affect the political institutions: regime instability, electoral volatility, social inequality, institutional borrowing, and rapid institutional design. The institutional diffusion in Latin America has two implications: on the one hand, it follows the U.S. American model, and on the other hand, it follows the institutional patterns of neighboring countries. Thus, waves of institutional changes or similar patterns in Latin American politics are not surprising. The first wave of creation of the offices occurred at the beginning of the 1990s with the return of democracy. the second occurred at the beginning of the 21st century.

Table 7 presents the executive orders of the creation or modification of the office of the first lady.

**Table 7. Executive orders of creation or modification of the office of the first lady in Latin American countries**

<b>Name</b>	<b>Number</b>	<b>Year</b>	<b>Topic</b>
<b>Bolivia</b>			
Decreto Supremo	No. 24.239	1996	Honorary role of the first lady
Decreto Supremo	No. 25.055	1998	Office of the first lady (creation)
Decreto Supremo	No. 25.214	1998	Office of the first lady (tasks, organization chart)
Decreto Supremo	No. 27.392	2004	Office of the first lady
Decreto Supremo	No. 27.994	2005	International travels
Decreto Supremo	No. 28.289	2005	Travel cost
Decreto Supremo	No. 1.525	2013	Diplomatic passport
<b>Chile</b>			
Resolución exenta	No. 0974	2009	Office of the first lady (Sociocultural direction of the Presidency (creation))
Resolución exenta	No. 3.663	2010	Office of the first lady (change the name)
Resolución exenta	No. 4387	2010	Office of the first lady (tasks)
Resolución exenta	No. 3.809 §2	2014	Office of the first lady (change the name)
<b>Colombia</b>			
Decreto	No. 1680	1991	Office of the first lady (creation)
<b>Costa Rica</b>			
Decreto Ejecutivo	No. 32.300 §166	2005	Office of the first lady (creation)
Decreto Ejecutivo	No. 38.525	2014	Office of the first lady (modification)

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Decreto Ejecutivo	No. 38.977 §1	2015	Office of the first lady (tasks)
<b>Dominican Republic</b>			
Decreto	No. 741-00	2000	Office of the first lady (creation and organization chart)
<b>Guatemala</b>			
Acuerdo Gubernativo	No. 893-91	1991	Office of the first lady (creation)
Acuerdo Gubernativo	No. 351-94	1994	Office of the first lady (tasks)
Acuerdo Gubernativo	No. 94-2005	2005	Office of the first lady (organization chart)
Acuerdo Gubernativo	No. 133-2008	2008	Office of the first lady (organization chart)
Acuerdo Gubernativo	No.330-2014	2014	Office of the first lady (organization chart)
<b>Panama</b>			
Decreto Ejecutivo	No. 936	2010	Office of the first lady (organization chart)
<b>Paraguay</b>			
Decreto	No. 128	2003	
Decreto	No. 243	2013	Office of the first lady (derogation)
<b>Peru</b>			
Decreto Supremo	No.077-2002-PCM § 21-29	2002	Office of the first lady (creation, organization chart, tasks)
Decreto Supremo	No. 047-2066-PCM	2006	Office of the first lady (derogation)
Decreto Supremo	No. 082-2011-PCM	2011	Office of the first lady (creation)

Source: Compiled by the author

One indicator of adaptability is the number of years that the office has existed. In this regards, the longer an organization or procedure has been in existence, the higher the level of institutionalization (Huntington, 1968, p. 13). However, following Ragsdale and Theis (1997, p. 1290), the notion of adaptability as duration implies two aspects for the presidency: (a) the flexibility presidents have to create, modify, and eliminate units and (b) the resilience of critical units no matter who the president is.

Three indicators are used to measure this dimension. First is the number of years of the duration of the office: subtracting the year of the office's creation from either 2014 (if the office still exists) or the year of derogation (if the office has since been abolished). Second, the number of presidents that the office has survived indicates whether the office of the first lady depends on one particular president. The third indicator is the number of modifications that the office underwent.

Table 8 presents the original name of the office per country, its dependency, the issue addressed by the official document (creation, modification, or derogation), the year of creation, the name of the document, the year of abolition (if applicable), the name of the document (if applicable), the total duration of the office, and the number of presidents that the office survived.

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**Table 8. Indicators of adaptability of the office of the first lady per country**

Country	Name of the Office	Dependency	Issue	Office created (year)	Document	Office ends (year)	Document	Total Duration (in years)	Number of presidents	Number of changes
Bolivia	Despacho de la Primera Dama	Institutional presidency	Creation	1998	Decreto Supremo 25055 23/05/1998	2004	Decreto Supremo 27392 05/03/2004	6	4	2
	Despacho de la Primera Dama	Institutional presidency	Modification	1998	Decreto Supremo 25214 30/10/1998	-	-			
	Unidad de Apoyo a la Gestión Social	Institutional presidency	Creation	2004	Decreto Supremo 27392 05/03/2004	-	-	10	4	
Chile	Dirección Sociocultural	Institutional presidency	Creation	2009	Resolución 0974 17/04/2009	2010	Resolución 3663 05/11/2010	1	1	3
	Gabinete de la Primera Dama	Institutional presidency	Creation	2010	Resolución 3663 05/11/2010	2014	Resolución 3809 13/11/2014	4	1	
	Dirección Sociocultural	Institutional presidency	Creation	2014	Resolución 3809 numeral 2 13/11/2014	-	-	1	1	
Colombia	Despacho de la Primera Dama	Institutional presidency	Creation	1991	Decreto 1680 03/07/1991	1994	Sentencia C-089A/94	3	1	0
Costa Rica	Despacho de la Primera Dama	Institutional presidency	Creation	2005	Decreto Ejecutivo 32300 25/03/2005 Artículo 166	-	-	9	4	1

## Chapter 2: The Office of the First Lady: Evidence from Latin America, 1990-2014

	Despacho de la Primera Dama	Institutional presidency	Modification	2014	Decreto 38525-MP 07/08/2014	-	-			
Dominican Republic	Despacho de la Primera Dama	Institutional presidency	Creation	2000	Decreto 741-00	-	-	14	4	0
El Salvador	Despacho de la Primera Dama	Institutional presidency	-	-	-	-	-	-	-	-
Guatemala	Secretaria de Obras Sociales de la Esposa del Presidente (SOSEP)	Institutional presidency	Creation	1991	Acuerdo gubernativo 893-91	-	-	23	7	4
			Modification	1994	Acuerdo gubernativo 351-94	-	-	-	-	
			Modification	2005	Acuerdo gubernativo 94-2005	-	-	-	-	
			Modification	2008	Acuerdo gubernativo 133-2008	-	-	-	-	
			Modification	2014	Acuerdo interno 330-2014 02/10/2014	-	-	-	-	
Honduras	Despacho de la Primera Dama	Institutional presidency	-	-	-	-	-	-	-	
Panama	Secretaria de coordinación de asuntos comunitarios	Institutional presidency	Creation	2010	Decreto ejecutivo 936 5/10/2010	-	-	4	2	0
Paraguay	Despacho de la Primera Dama	Institutional presidency	Creation	2003	Decreto 128 22/08/2003	2013	Decreto 243 11/ 09/2013	10	4	0

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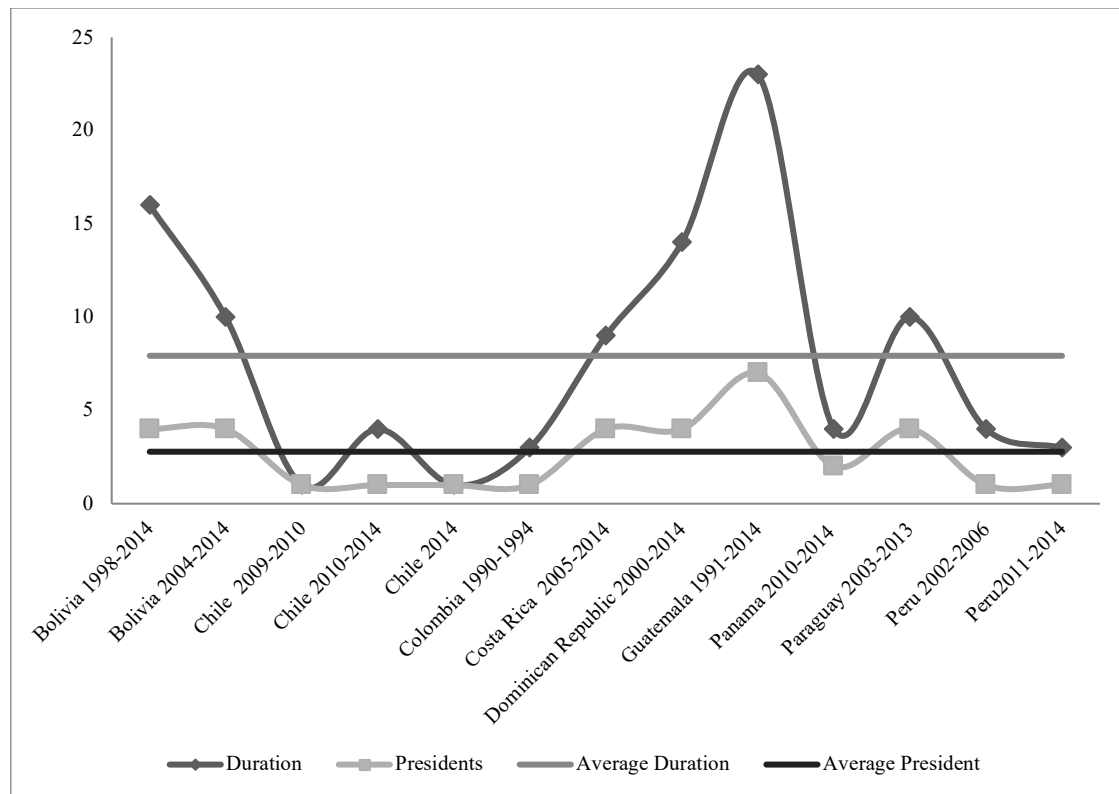
Peru	Despacho de la Primera Dama	Institutional presidency	Creation	2002	Decreto Supremo N° 007-2002-PCM	2006	Decreto Supremo 047-2006 PCM 03/08/2006	4	1	1
	Apoyo a las actividades de la Primera Dama	Institutional presidency	Creation	2011	Decreto Supremo 082-2011-PCM	-	-	3	1	

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 Source: Compiled by the author

The average duration of the office of the first lady was 12.2 year in the period 1990-2014, and the average number of president the office survived was 4.2. The maximum duration of the office was in Guatemala (23 years), followed by Bolivia (16 years) and the Dominican Republic (14 years). The minimum period occurred in Colombia (three years). Honduras and El Salvador do not have an official document of creation. However, their offices had official websites with the presidency. Figure 5 summarizes the duration in years of the office of first lady, its number of residents, and its changes.

**Figure 5. Summary of adaptability of the office of the first lady**



Source: Compiled by author

The modifications to the office can be divided into two categories: change in the office's name and change in the office's structure. Three cases belong to the first group: Bolivia (from office of the first lady [*Despacho de la Primera Dama*] to support unit of social management [*Unidad de Apoyo a la Gestión Social*]), Chile (from office of the first lady [*Gabinete de la Primera Dama*] in 1990 and 2010 to sociocultural directorate (*Dirección Sociocultural*) in 2009 and 2015, and Peru (from office of the first lady

[*Despacho de la Primera Dama*] to support units of the activities of the first lady [*Unidad de apoyo a las actividades de la Primera Dama*]).

The name changes in Chile result from to the necessity to neutralize the name of the office during the mandate of a women President: Michelle Bachelet (2006-2010 and 2014-2018). She changed the name from the office of the first lady to the sociocultural directorate during her two presidential terms.

Six cases belong to the second category: Bolivia (1998), Costa Rica (2014), and Guatemala (1994, 2005, 2008, 2014). In all cases, the modifications add more administrative structures to the office and assign additional means, more staff, and budget.

### **2.5.2. Complexity**

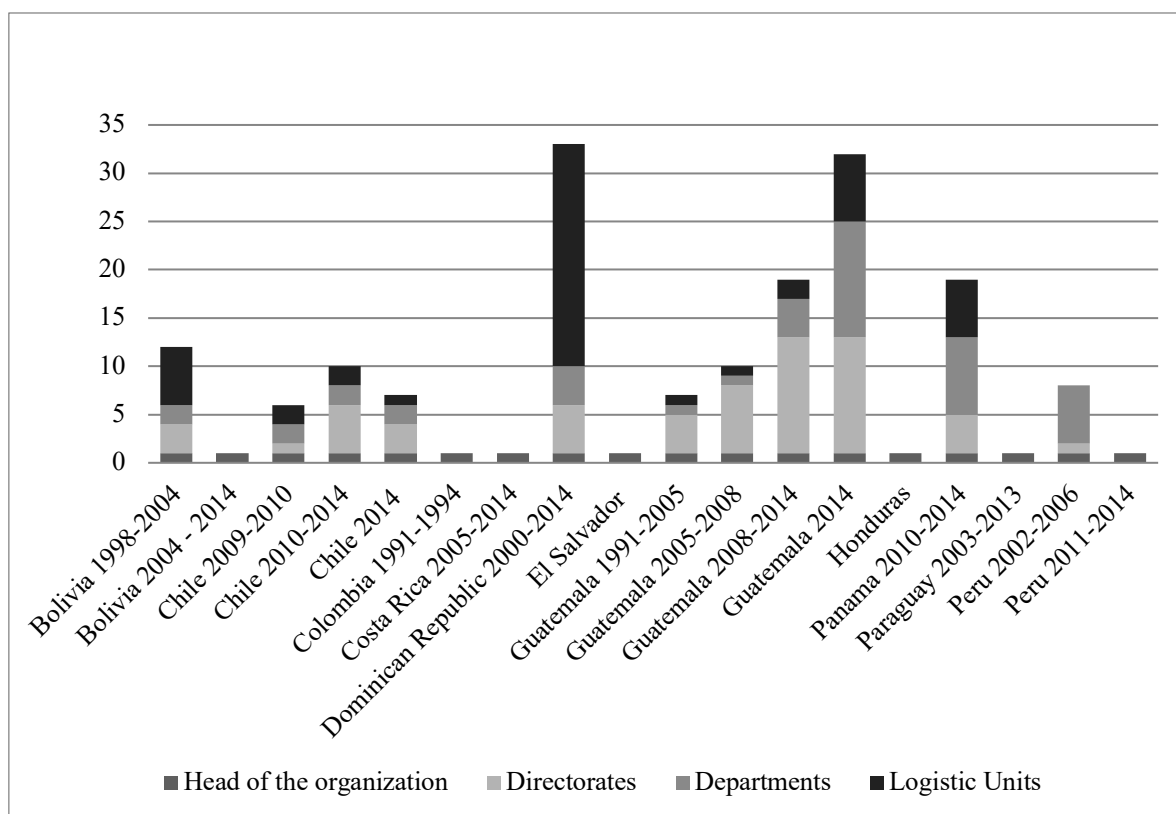
The office of the first lady, like all agencies, has an internal division of labor. Some institutional designs are more complicated than others. According to Huntington, (1968, p. 18), complexity may involve both multiplication of organizational subunits, hierarchy, and functionality and differentiation of separate types of organizational subunits. In other words, as an internal aspect of institutionalization, complexity marks an organization's increased division of labor and specialization (Ragsdale & Theis, 1997, p. 1291).

The office of the first lady uses considerable material and personal resources, such as employees, offices, and funds. The office's internal organization can be divided into Organization Head (usually the first lady), Directorates (e.g., Finance, Donations, Protocol, Administrative, Press), Departments (e.g., Human Resources, Legal, International Relation, Planning, Public Relations), and Logistic Units (e.g., purchasing, information, transparency, coordination of programs or projects). Nevertheless, not all countries have the same hierarchy and nomenclature. For example, in some offices, the press unit is a directorate, while in others, it is a department. In this paper, the same names and hierarchies stated in the decree are used. In some cases, the structure is not defined by the decree, and the information on the division of labor is not available. In these cases, only the head of the organization has been identified.

In this regard, one indicator of complexity is the number of office subunits. The number of subunits indicates the internal division of labor and specialization of the office.

Figure 6 illustrates the number of subunits of the office of the first lady and its changes over the years.

**Figure 6. Subunits of the Office of the First Lady per country**



Source: Compiled by the author

The most complicated structure is in the Dominican Republic (2000-2014), with 33 subunits, followed by Guatemala (2014) with 32 subunits, and Guatemala (2008-2014) and Panama (2010-2014) with 19 subunits. Bolivia (1998-2004), with 12 and Chile (2010-2014), with 10, also have complicated structures.

The cases of Guatemala and Chile are of interest regarding centralization and decentralization of the institutional presidency. The office of the first lady in Guatemala has changed considerably over time. Guatemala started with seven subunits in 1990, later increasing to 10, then 19, and finally 32 subunits in 2014. The number of units in 2014 quadruples the number of units in 1990.

In the Chilean case, President Sebastián Piñera (2010-2014) changed the name from Sociocultural Directorate to the office of the first lady and added four units in 2014. The growth of the office can be interpreted as centralization of functions within the institutional presidency and a powerful signal of strengthening the role of the first lady. After his presidential mandate, the office returned to the previous name but with more units than in 2009.

### **2.5.3. Autonomy**

Following Huntington (1968, p. 20), political institutionalization in the sense of autonomy means the development of political organizations and procedures that are not merely expressions of particular social groups' interests.

One indicator of autonomy is the growth of an organization's budget. This growth suggests the economic independence of the office. In the case of the office of the first lady, this information is complicated to obtain because the office's budget is part of the institutional presidency, and usually, there is no disaggregated information available. Also, the office of the first lady can receive donations, which are not part of the official budget of the presidency or even accountable to other public organizations. Another problem is that the first lady can use reserved expenses from the presidency, especially for protocol or ceremonial duties; resources from other public institutions, like the Foreign Ministry, in official visits; and presidential resources, such as the presidential airplane and car or presidential security.

However, it is possible to classify whether money from the budget comes from public or private funds. Every presidential decree mentions whether the office of the first lady receives public funds and donations from private companies, international organizations, or other third parties. Also, the office can enter into alliances for specific projects with sponsors or companies. Furthermore, the foundations in the first lady's charge can increase access to resources. Usually, those foundations are private law actors and do not have to publish their budgets.

The privileged access to private donations is a controversial point in the debate, especially because some first ladies are accused of receiving irregular resources during their mandates or using privileged information for business purposes. Nadine Heredia in Peru (2015) (El Comercio, 2015; Perú21, 2017), Ana García Carías in Honduras

(2015)(El Heraldo, 2015; Meléndez, 2015), Sebastián Dávalos in Chile (2015) (El Mercurio, 2015; La Tercera, 2017), and Angélica Rivera in Mexico (2014)(Martínez Ahrens, 2014; Moreno, 2014) are examples of this phenomenon.

Table 9 presents the sources of the budget for each country (public funds or private donations).

**Table 9. Sources of the budget of the office of the first lady**

Country	Sources of Budget	
	Public Funds	Private Donations
Bolivia 1998-2014	Yes	Yes
Chile 2009-2014	Yes	Yes
Colombia 1991-1994	Yes	No
Costa Rica 2005-2014	Yes	Yes
Dominican Republic 2000-2014	Yes	Yes
El Salvador	Yes	Yes
Guatemala 1991-2014	Yes	Yes
Honduras	Yes	Yes
Panama 2010-2014	Yes	Yes
Paraguay 2003-2013	Yes	No
Peru 2002-2006	Yes	Yes
Peru 2011-2014	Yes	No

Source: Compiled by the author

Nine of the twelve offices of the first lady could receive private donations, and two of the three remaining are closed (Colombia in 1994 and Paraguay in 2013). The fact that the office was not allowed to receive donations does not mean that the first lady herself could not obtain the support of private companies for her programs or her husband's electoral campaign. In most cases, the first lady was considered a private citizen regarding accountability and administrative responsibility.

Another dimension of autonomy is the capacity of the office to make its own decisions. In the literature, this capacity is referred to as decisional autonomy. In the case of the office of the first lady, decisional autonomy has two components: (a) internal, or related to decisions about the resources and personal of the office and (b) external, or

related to the capacity to acquire responsibilities with other organization and to design and implement policies. This indicator tests whether the office can decide on programmatic and personnel matters mostly independently from the president.

**Table 10. Decisional Autonomy**

Country	Internal		External	
	Allocation and distribution of resources	Appoint the staff	Sign agreements with other institutions and countries	Promote programs or policy
Bolivia 1998-2014	Yes	Yes	Yes	Yes
Chile 2009-2014	Yes	Yes	Yes	Yes
Colombia 1991-1994	Yes	Yes	No	Yes
Costa Rica 2005-2014	Yes	Yes	Yes	Yes
Dominican Republic 2000-2014	Yes	Yes	Yes	Yes
El Salvador	Yes	Yes	Yes	Yes
Guatemala 1991-2014	Yes	Yes	Yes	Yes
Honduras	Yes	Yes	Yes	Yes
Panama 2010-2014	Yes	Yes	Yes	Yes
Paraguay 2003-2013	Yes	Yes	Yes	Yes
Peru 2002-2006	Yes	Yes	Yes	Yes
Peru 2011-2014	Yes	Yes	No	Yes

Source: Compiled by author

In all cases, except Colombia and Peru (2011-2014), the office of the first lady is entirely autonomous regarding decisions.

#### 2.5.4. Coherence

Coherence is related to the precise definition of tasks and means that the functions of the organization are common internal knowledge. According to Huntington (1968, p. 22), an effective organization requires, at a minimum, substantial consensus on the functional boundaries of the group and on the procedures for resolving disputes that occur within those boundaries.

One indicator is the precise definitions of tasks. This indicator can be measured through the central issues of the office's mission. The analysis of the mission of the office of the first lady focuses on three topics: (a) protocol, or whether the office gives support to the official and ceremonial activities; (b) social, or whether the office has a social role focused on social issues, such as family, children, woman, and/or poverty; and (c) policy, or whether the office can design, implement, and promote programs and/or public policies. Some decrees do not explicitly mention the protocol support, although in the office's structure, a particular unit is dedicated to that topic.

**Table 11. Coherence of issues of the office of the first lady**

<b>Country</b>	<b>Protocol</b>	<b>Social</b>	<b>Policy</b>
Bolivia 1998-2014	No	Yes	Yes
Chile 2009-2014	Yes	Yes	Yes
Colombia 1991-1994	Yes	Yes	Yes
Costa Rica 2005-2014	Yes	Yes	Yes
Dominican Republic	No	Yes	Yes
El Salvador	Yes	Yes	Yes
Guatemala 1991-2014	No	Yes	Yes
Honduras	Yes	Yes	Yes
Panama 2010-2014	Yes	Yes	Yes
Paraguay 2003-2013	Yes	Yes	Yes
Peru 2002-2006	No	Yes	Yes
Peru 2011-2014	Yes	Yes	Yes

Source: Compiled by the author

Coherence involves an organization's ability to manage its workload (Ragsdale & Theis, 1997, p. 1297). In this regard, the Constitutional Court of Colombia criticized the vagueness and imprecision of the tasks of the office of the first lady in 1994 (Corte Constitucional de Colombia, 1994). The decree creating the office indicates that the office is responsible for administrative assistance to the first lady in the activities that she finds appropriate. The judges found that the lack of functional boundaries was detrimental to the legitimacy and efficiency of the political system.

Another indicator of coherence is tolerance and interaction with other institutions. This indicator measures whether other organizations accept the existence of the office and know its tasks. For example, the office of the first lady has to coordinate meetings, activities, and agendas not only with governmental entities but also with Parliament and

organizations in civil society. The formal office of the first lady is recognized not only by organizations but also by society in all countries, except Colombia and Peru, where the offices received harsh criticism from governmental institutions.

## 2.6. Index of Institutionalization of the Office of the First Lady, 1990-2014

The index of institutionalization of the office of the first lady presents a comparative and accumulative view of the results based on empirical evidence per country. This index considers an intra-category approach to the four dimensions of analysis (adaptability, complexity, autonomy, and coherence) as is explained in the methodological section. Each dimension represents 25% of the total score.

**Table 12. Index of institutionalization of the office of the first lady, 1990-2014**

Country	Total	Adaptability		Complexity			Autonomy		Coherence	
		Duration	President	Changes	Material and personal resources	Subunits	Budget	Decisional Autonomy	Issues	Relations with other institutions
Guatemala	4.50	0.75	0.25	0.25	0.6	0.75	0.45	0.5	0.45	0.5
Paraguay	4.05	0.45	0.25	0.25	0.45	0.15	0.75	0.5	0.75	0.5
Dominican Republic	3.95	0.45	0.25	0	0.60	0.75	0.45	0.5	0.45	0.5
Chile	3.73	0.45	0.15	0.25	0.38	0.3	0.45	0.5	0.75	0.5
Panama	3.75	0.15	0.25	0.25	0.45	0.45	0.45	0.5	0.75	0.5
Bolivia	3.58	0.6	0.25	0.15	0.38	0.3	0.45	0.5	0.45	0.5
Costa Rica	3.30	0.3	0.25	0.1	0.3	0.15	0.45	0.5	0.75	0.5
Peru	3.18	0.3	0.25	0.1	0.53	0.3	0.75	0.1	0.75	0.1
El Salvador	2.65	0	0	0	0.3	0.15	0.45	0.5	0.75	0.5
Honduras	2.65	0	0	0	0.3	0.15	0.45	0.5	0.75	0.5
Colombia	2.50	0.15	0.05	0	0.45	0.15	0.75	0.1	0.75	0.1

Source: Compiled by the author

The country with the most institutionalized office of the first lady in Latin America is Guatemala. This office is also the oldest in the region. The least institutionalized office (Colombia) was the office with the shortest duration. Therefore, recently created offices should need more time for their institutionalization. Furthermore, regarding the dimension of adaptability, the percentage of presidents the office survives is 100% until 2014 for all countries except Colombia and Paraguay. In other words, when a president creates the office of the first lady within the institutional presidency, the subsequent presidents utilize the office or at least maintain the institution. The index also indicates that the name of the office of the first lady (office or secretary) within the institutional presidency does not affect the level of institutionalization. The complexity of the office, measured in a number of subunits, plays a more prominent role in this context. Some offices are as sophisticated as a secretary.

The fact that some indicators have the same value in almost all cases may imply that the offices follow the same patterns of behavior due to institutional diffusion. One example is the indicator for the budget where most offices receive private donations as well as public funds. This fact affects the institution's economic autonomy, making it vulnerable to the particular interests of some groups. However, if the office can use more resources, it can perform more activities and generate a more substantial political impact. Regarding coherence, in most cases, the office has a clear but broad definition of tasks. These tasks are written in a general way and can be interpreted with different emphasis. The large degree of decisional autonomy allows the implementation of changes without the approval or revision of other institutions. Also, the office is accepted by governmental institutions and organizations of civil societies in most of the cases. The office and these institutions have a close relationship through coordinating activities, their agendas, and meetings.

In summary, the level of institutionalization of the office of the first lady presents significant variation among Latin American countries. In nine countries, the office of the first lady is a stable agency within the institutional presidency. For the sub-regions Central and South America, the institutionalization of the office of the first lady is trending higher in Central American countries than in South American countries.

## 2.7 Conclusion

The study of the office of the first lady in Latin America indicates that both social phenomena and theories are geographically and culturally bound. The office of the first lady is both a formal and an informal agency within the institutional presidency. The non-existence of a formal office in Argentina, Brazil, Ecuador, Nicaragua, Uruguay, and Venezuela and the abolition of it in Colombia and Paraguay do not mean that the first ladies of those countries play an unimportant role in international and domestic politics. In other words, in some countries, there is informal support for the performance of the first lady.

The institutionalization of the formal office of the first lady in Latin American countries is a process under development in four dimensions: adaptability, complexity, autonomy, and coherence. The analysis of each dimension suggests the follow. For adaptability, at the beginning of the 1990s, the pioneering offices of the first lady were established in Colombia (1991) and Guatemala (1991). After 2000, the second wave of creation and modification began in Latin American countries: Dominican Republic (2000), Peru (2002), Paraguay (2003), Bolivia (2004), Costa Rica (2005), Guatemala (2005-2008-2014), and Chile (2009). All the offices survived more than one president, and they have changed over time not only in structure but also in name. The dimension of complexity suggests that the offices are structured considering the division of labor and specialization; some offices are as complex as secretaries. For autonomy, in economic terms, most offices of the first lady depend on both public funds and private donations, which make the office susceptible to the interests of private groups. Regarding decision-making, most of the offices are autonomous. Finally, for coherence, most offices have clear and defined tasks, and they are recognized not only by other governmental institutions but also by the civil society. The level of institutionalization presents significant variation among countries and trends higher in Central America than in South America.

The analysis indicated two waves of institutional changes or similar patterns in Latin American politics regarding the office of the first lady. The first wave of creation occurred at the beginning of the 1990s with the return of democracy, and the second happened at the beginning of the 21st century when new democracies were more

consolidated. The first wave of creation for this office began with Guatemala (1991), Colombia (1991), and Bolivia (1998). The second wave of creation or substantial modification of the offices started with Dominican Republic (2000) and continued with Peru (2002), Paraguay (2003), Bolivia (2004), Costa Rica (2005), Chile (2009), Guatemala (2005, 2008, 2014) and Panama (2010). The two waves confirmed the diffusion effect in the region.

The president has incentives to create, redesign, and modify the office to support the first lady's behavior and choices. The design and institutionalization of the office of the first lady occur as presidential calculus and involve the management of resources, responsibilities, issues, and relationships with other government institutions and Congress. In some cases, the office of the first lady might be a key institution within the institutional presidency in order to support the presidential agenda.

Further research on the office of the first lady remains necessary, particularly regarding the conditions under which the office has been changed and its role within the institutional presidency. Additionally, research on the informal support of the first lady is needed. Finally, future work needs to explore the effects and consequences of the institutionalizations and changes of the office of the first lady to political accountability and the first lady's behavior.

## **Chapter 3: When Do Former First Ladies Run for Office? Lessons from Latin America**

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### 3.1 Introduction

Non-traditional candidates have been objects of analysis in recent studies of presidential and legislative elections in Latin America. Research has examined institutional and contextual factors to explain the electoral rise of newcomer candidates (Carreras, 2012, 2017; Corrales, 2008), ex-presidents (Corrales, 2008), and women (Bauer & Tremblay, 2011; Craske, 2013; Htun, 2000; Iyengar, Valentino, Ansolabehere, & Simon, 1997; Norris, 1997b; Schwindt-Bayer, 2012). Within this research stream, the most studied group has arguably been women in politics (Borrelli & Martin, 1997; Craske, 2013; Htun, 2000; Htun & Piscopo, 2014; Norris, 1997; Norris & Inglehart, 2001; Schwindt-Bayer, 2012). However, scholars have failed to analyze a new type of female candidate: former first ladies. Between 1990 and 2016, 20 former first ladies ran for office 26 times and were elected on 19 occasions.<sup>15</sup> These candidates have become presidents (two times), vice presidents (three), and legislators (eight in unicameral congresses, five senators, and one deputy in bicameral legislatures). Some unsuccessful candidacies have been highly controversial: three former first ladies challenged the constitutions of their countries when they tried to run for the presidency, and a fourth did not accept the results when she lost the presidential election. Despite the increasing importance of these candidacies in national politics, no past work has tried to answer why former first ladies have run for elected positions. In this article, we aim to cover this scholarly lacuna.

Understanding why former first ladies run for office is a pressing query for at least three reasons. First, the politicization of these women increases the risk of personalizing politics. Former first ladies may receive support mainly based on the popularity of their husbands or the charisma they built during their tenure. In these cases, the chance of candidate success may be only marginally related to their public policy proposals and the parties that support them. In the context of institutional weakness and fragile party systems, former first ladies who run for office may serve as a destabilizing factor.<sup>16</sup> Second, the candidacy of an ex-first lady creates dynastic relations in the political elite. Dynastic politicians are those related by blood or marriage to other individuals formerly

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<sup>15</sup> For more information see Table **¡Error! Solo el documento principal.** “Former first ladies in Latin American elections, 1990-2016”

<sup>16</sup> For a discussion of the effects of personalization in politics, see McAllister (2007).

holding political office (Dal Bó et al., 2009; Folke et al., 2017; Geys & Smith, 2017). Political dynasties have long been present in democracies, raising concerns that inequality in the distribution of political power affects democratic representation (Dal Bó et al., 2009, p. 115). Adding former first ladies to the list of members of political families that rotate in positions of power in Latin America will make those families more influential, restricting the competitiveness of regional democracies (Arana, 2016). Third, the study of the candidature of ex-first ladies contributes to an unexplored area in the literature of women in politics. First ladies who run for office increase the participation and visibility of women in politics and diversify the ways females enter the electoral arena.

The surge of former first ladies in the electoral arena is unlikely to be a temporary trend. Certain structural conditions seem to favor their advancement as competitive candidates. First, since at least 1990, Latin American voters and regional political elites have not regarded politics as exclusively a male job. In 1990, Nicaraguan Violeta Chamorro (1990-1997) became the first female elected president in Latin America. In 1991, Argentina approved the first gender quota law (*Ley de Cupos*) in the world, and since the mid-1990s, the representation of women in cabinets had risen dramatically (Escobar-Lemmon & Taylor-Robinson, 2005). Second, the media has increasingly covered the activities of first ladies, giving them an opportunity to build personal political capital. First ladies have become public figures whose looks, ideas, and actions receive much public attention, and they are often considered role models for women, mothers, activists, and even the fashion industry (Wekkin, 2000; Winfield, 1997). Third, the role of the first lady has changed. Several scholars agree that, over time, the role of first ladies in the United States has become more political (Burns, 2004; Mayo, 2000; Muir & Benitez, 1996; Watson, 1997). In Latin America, the first lady's role has become so political that the position itself offers an excellent platform to enter the electoral arena.

Former first ladies have entered politics through different paths. Some became candidates only after leaving the executive office, and their campaigns were explicitly related to the leadership of their husbands or fathers. However, others were politicians before becoming first ladies.

Exponents of the first group are Margarita Cedeño and Xiomara Castro. Cedeño was not involved in politics before her husband, Leonel Fernández, became president of the Dominican Republic in 2004. Once Fernández was elected, she played an outstanding

role in the government, promoting public policies and implementing social programs. Since the constitution of the Dominican Republic did not allow Fernández to run for another reelection, a social movement of Dominicans living abroad drove her candidature to the vice presidency. Her supporters used the slogan “*Con ella seguimos con él*” (with her we continue with him) (Cruz Tejada, 2010) as a symbol of continuity with her husband’s politics. In 2011, Fernández’s Dominican Liberation Party nominated Cedeño for the vice presidency, and she became the running mate of Danilo Medina. They were elected (2012-2016) and reelected (2016-2020).

Like Cedeño, Xiomara Castro did not have political experience before her husband, Manuel Zelaya, reached the Honduran presidency in 2006. Her only involvement in politics before becoming a presidential candidate in 2013 was her participation in Zelaya’s 2005 campaign and her assistance organizing demonstrations after the coup against him in 2009. Zelaya described the political emergence of his wife, saying that “when it was the coup, when I was banished, she went to the streets and became the most popular woman in Honduras. That is the origin of her candidacy” (Zelaya, 2013). Analysts widely regarded Castro as a delegate of her husband. As Markous (2013) said, “Xiomara had no previous political trajectory. That does not mean that she does not have her own opinions, the problem is that Zelaya’s shadow prevents others from seeing her. Others went further, suggesting that Zelaya used her to return to power (Serrafero 2015, p. 97).

With previous political experience, Hilda González, Emilia Alfaro, and Cristina Fernández are in the second group. González, known as “Chiche Duhalde,” was deputy (1997-2003) before her husband Eduardo Duhalde (2002-2003) became president of Argentina. After Duhalde’s term, she continued an upward political trajectory as deputy (2003-2005) and senator (2005-2011). Similarly, Emilia Alfaro was deputy (2008-2013) before her husband, Federico Franco (2012-2013), reached the Paraguayan presidency. After being first lady, she was elected senator (2013-2018). Cristina Fernández became the first female elected to the Argentinean presidency in 2007 after his husband, Néstor Kirchner, decided not to run for reelection. She had vast political experience as deputy (1989-1995; 1997-2001) and senator (1995-1997; 2001-2005; 2005-2007) before becoming first lady. However, her candidature to the presidency was controversial. The couple was seen as a political marriage, and a number of pundits and part of the press

speculated that they had a pact of alternation in the presidency. Her election was mocked as the “Kirchner dynasty” (Gallo, 2008), “spousal reelection” (Zovatto, 2014), “marital succession” (Serrafero, 2015), and “diarchy” (Grondona, 2007), among others.

The cases described suggest that there are two dominant types of former first ladies who run for office: politically inexperienced heiresses and experienced politicians. However, so far scholars, pundits, and the media have treated most of these candidates as little more than the “covert reelection” of their husbands. For instance, several analysts (Grondona, 2007; Leuco, 2015; Mendeleovich, 2007; Serra, 2007) described the candidature of the politically experienced Cristina Fernández mainly as covert reelection (“*reelección encubierta*”), as well as the candidature of politically inexperienced former first ladies, such as Xiomara Castro in Honduras (Markous, 2013; Pérez Salazar, 2013), Marta Linares in Panama (Castillo, 2014; *La estrella de Panamá*, 2014; O’Grady, 2014) and Margarita Cedeño in Dominican Republic (EFE, 2014). This lack of differentiation does not allow us to understand the underlying causes that motivate some first ladies to run for office.

This chapter begins to cover this theoretical and empirical gap examining which former first ladies run for office. We contend that politically ambitious women strategically use their position as first lady to increase their political capital and succeed in a future election. We also propose that former first ladies take into account context and time their candidacy for when they face the most favorable circumstances. Therefore, we hypothesize that former first ladies are more likely to run for office when they have previous experience as elected politicians and in the available first elections after leaving office. We tested our theory by conducting the first longitudinal cross-country analysis of former first ladies’ behavior. Our results indicate that the political ambition of former first ladies, revealed through their previous political experience, is the primary factor explaining why they become candidates. We also found that only politically experienced first ladies take advantage of their first chance to enter the political arena once they leave the executive office.

This chapter proceeds as follows. The next section reviews the scholarly literature about women in politics and non-traditional candidatures to the presidency and the legislature in Latin America. The third section presents our theory. The fourth provides the research design and the results of discrete-time duration analyses in which the unit of

analysis is first lady-election year. In the conclusion, we discuss the implications of our findings and future avenues of research.

### **3.2 First Ladies as Candidates**

Although the concept of “first lady” is frequently used in the literature, there is no consensus about the definition of the role. In most cases, the title has been used to describe the wife of the head of government in presidential regimes. Latin American countries have seven possible combinations between a president and a first lady: (a) the president is a married man, and the first lady is his wife; (b) the president is a non-married man, and the first lady is anyone appointed to the role (usually his mother, daughter, or sister); (c) the president is a married woman, and the position is filled by her husband, the “first gentleman”; (d) the president is a non-married woman, and the first lady/gentleman is anybody appointed to the role; (e) irrespective of the gender of the head of government, the position remains or becomes vacant; (f) regardless of the married presidents’ gender, the president appoints someone after divorcing during his or her term; (g) the president is a married homosexual and appoints his or her wife or husband. In this article, we only examine wives and daughters who have held the position because, thus far, they are the only ones who have run for office after leaving the executive power.

Some researchers have begun to systematically analyze first ladies. Scholars of American first ladies have demonstrated the relevance of the position in domestic politics. These studies have focused on the first ladies’ roles (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Watson, 1997; Wekkin, 2000; Winfield, 1997), impact on the presidential campaigns (Burns, 2005; Burrell et al., 2011; MacManus & Quecan, 2008), types of representation (M. Borrelli, 2011), absence of accountability (Borrelli & Martin, 1997; Broyde & Schapiro, 1998), histories (Burrell et al., 2011; Caroli, 2010; Eksterowicz & Paynter, 2000; Watson, 1997), press framing (Burns, 2004; Kalyango & Winfield, 2009; Winfield, 1997a, 2007), and political influence (M. Borrelli, 2002b; Mayo, 2000; O’Connor et al., 1996; Watson, 1997, 2001). The available research about Latin American first ladies is more modest, centered mainly on biographies (e.g., Caula & Silva, 2011; Gordinho, 2009; Abendroth & Bridikhina, 1998; Ruiz, 2012; Wornat, 2005) and on historical reviews of specific countries (Balcácer, 2010; Gasparini, 2002; Sefchovich, 2003; Sierra, 2002).

To the best of our knowledge, there has been no analysis of Latin American former first ladies that have become candidates. Therefore, to have a better understanding of why former first ladies run for office, we review the literature centered on why individuals become candidates, on women in politics, and on candidates without prior political experience (i.e., newcomers).

At the most general level, the literature on elections has identified two main factors that explain why individuals seek election: political ambition and structure of opportunity. Inspired by the classical work of Schlesinger (1966) on ambition, some authors have studied the political careers of politicians to understand their motivations to run for office (Borchert, 2011; Fox & Lawless, 2005, 2010). The goals that drive political ambition are diverse: power, social status, interest representation, “good” policy, and the common good—all these motivations are usually combined in some specific mixture (Borchert, 2011, p. 119). Fox and Lawless (2005), for instance, argued that considering a candidacy requires contemplating the courageous step of going before the electorate and opening oneself up to potential examination and rejection by the public. In sum, although the motivations to pursue a career in politics vary, collectively these authors agree that ambition is a necessary condition to run for office.

In a second explanation, scholars have argued that potential candidates are more likely to seek office when they face favorable circumstances (Fox & Lawless, 2005, p. 644). The studies by Fox and Lawless (2004, 2010) indicate that women’s decision to run for office is affected by support and encouragement from political actors and by their self-confidence. Both factors reflect society’s image of women in politics. Borchert (2011, p. 121) noted that for an ambitious candidate, the institutional structure of opportunity may be translated into the availability, accessibility, and attractiveness of political offices. Availability denotes the posts for which any given candidate can run. Accessibility describes the relative ease with which a particular position can be obtained. Finally, attractiveness refers to the properties of the office itself.

Various scholars have demonstrated that gender matters in elections (M. Borrelli & Martin, 1997; Htun, 2015; Norris, 1997b; Norris & Inglehart, 2001). Women have historically been underrepresented in the highest offices of the state (Norris, 1997, p. 149). Men have dominated public posts, and politics has been read and understood in masculine codes and standards, excluding women both in deliberations and in decision-making

processes on matters of public interest (Peschard, 2003, p. 20). Women face great visible and invisible (glass ceiling) obstacles to entering politics. Prejudice and cultural perceptions about the role of women, together with a lack of financial resources, are among the most significant barriers (Inter-Parliamentary Union, 2014, p. 4).

Despite the formal and informal obstacles, women's participation in politics has witnessed the greatest aggregate change over the past two decades in Latin America. Women's average share of the region's parliaments rose from 12.7% in 1995 to 26.4% in 2015 (Inter-Parliamentary Union, 2014, p. 4). The presence of women in the executive office has also grown significantly over time (Htun & Piscopo, 2014, p. 31). For instance, six countries have elected women as heads of state, and many others have had women run for office.

Most research centered on Latin America has tried to explain the causes and consequences of the growing number of women elected to office (Schwindt-Bayer, 2012, p. 5). Two prominent explanations have been proposed as causes: the adoption of gender quota laws and the change in social, economic, and cultural conditions.

Gender quota laws are a relatively recent phenomenon. Scholars have primarily sought to explain how and why quotas are adopted and, more recently, why some quota policies are more effective than others in facilitating women's access to political office (Krook, 2006, p. 110). Htun (2015, p. 117) found that between 1991 and 2000, 11 Latin American countries adopted quota laws establishing a minimum level for women's participation as candidates in legislative elections of 20% to 40%. Now, all Latin American countries, except Guatemala and Venezuela, have adopted gender quota laws. Htun and Piscopo (2014, p. 10) argued that women's presence in Latin American legislatures, as well as their growth over time, is relatively strong, owing mainly to the adoption of quotas. This proposition has support from different scholars. While Folke et al. (2017) found that gender quota laws tend to produce an inflow of women in the legislature, Htun (2015, p. 118) demonstrated that, on average, quotas boosted women's representation by 10 percentage points. A significant finding in this literature is that gender quotas need to be vigorously implemented to have a noticeable effect (Htun and Piscopo, 2014, p. 12).

Previous research has identified the importance of overall patterns of economic, social, and cultural development that provide opportunities for women who want to access elected offices (Htun & Piscopo, 2014, p. 14). For instance, Rosenbluth, Salmond, and Thies (2006, p. 188) found that the size of the welfare state has two important roles in promoting female participation in legislatures. The welfare state fosters representation first by partially “socializing” formerly housewife-dominated services and, second, by acting as a large-scale employer for women. Norris and Inglehart (2001) have demonstrated that egalitarian attitudes toward women in office are more widespread in post-industrial societies, reflecting broad patterns of socioeconomic development and cultural modernization. Similarly, for the Latin American case, Escobar-Lemmon and Taylor-Robinson (2005) found that the increased representation of women in cabinets since the mid-1990s indicates the normalization of women in politics. Also, they identified that a president from a leftist party and a high percentage of women in the legislature increase the number of women in cabinets.

The main consequence of the rise of women in politics is an increased expectation to see more women in positions of state power and authority (Williams and Thames 2008; Thames and Williams 2013; Escobar-Lemmon and Taylor-Robinson 2005). This argument is twofold. First, female legislators encourage other women to run for office. In line with this, Fox and Lawless (2010, p. 321) found that encouragement from other political actors is the most critical predictor of considering a candidacy. Similarly, Atkeson (2003) discovered that women who live in states with successful, visible female candidates are more likely to be politically engaged. Second, women in Congress should increase the social acceptability of women participating in politics because female legislators affect not only the culture of the chambers but also the political culture of their countries. Efforts to elect more female legislators have often included claims that women change political practices, bring new policy priorities, interact differently with constituents, and modify the legislature’s political culture (Inter-Parliamentary Union, 2014, p. 15).

Former first ladies who did not have electoral experience before running for office fit the definition of “political newcomers” (Carreras, 2012; Corrales, 2008; Samuels & Shugart, 2010). The emergence of this type of politicians has been associated with factors such as adverse macroeconomic conditions, new democracies, and level of democracy

(Carreras, 2012, 2017; Corrales, 2008). Carreras (2016, p. 9) found that newcomers are more frequent in new democracies because democratic institutions are weakly institutionalized and voters are still politically inexperienced. Relatedly, Corrales (2008) argued that voters demand new politicians when political liberties decline and found that newcomers succeed as candidates when authoritarianism increases. He also claimed that economic crises and accelerated economic growth increase the electoral demand for less conventional candidates because both junctures generate economic anxiety. In support of his argument, he discovered that economic growth and high inflation rates encourage votes for newcomers and ex-presidents in Latin America. Carreras (2016) also found a relationship between the election of newcomers and economic conditions. Contrary to Corrales, he determined that newcomers are less likely to be elected when the economy is growing. Instead, newcomers succeed when unemployment increases because, according to Carreras, voters turn to newcomers in adverse economic scenarios.

### **3.3 Theory: Political Experience and First Chance**

First ladies enjoy a privileged position in the political arena. They can influence the politics of the executive, the media extensively covers their activities, and they can contact both ordinary and influential people. Since first ladies do not make important decisions, the press, interest groups, and politicians are unlikely to antagonize them. Their position of high exposure with little responsibilities gives them a chance to become highly popular. For example, polls indicated that Nadine Heredia was more popular than her husband, Peruvian President Ollanta Humala (2011-2016) (Ipsos, 2013).

Despite their privileges, only a minority of first ladies try to become legislators or presidents once their husbands end their terms. Although media analysts and pundits have often described former first ladies who become candidates as political heiresses of their husbands, such vision is misleading. Conventional accounts of former first ladies do not consider the political trajectory of the candidates. Previous research has proposed that political ambition and structure of opportunity are two factors that explain why individuals become political candidates (Borchert, 2011; Fox & Lawless, 2004, 2005, 2010). We build on this literature to propose that first ladies are more likely to run for office when they have experience as elected politicians and at the first opportunity they have to become candidates after serving in the executive branch.

First ladies who have been elected politicians have demonstrated their ambition to compete for political office. Furthermore, their socialization into politics allows them to have confidence in their abilities to develop a political career, and they can enjoy the respect of voters who demand guarantees that they can perform well in elected offices. As Corrales (2008, p.3) claimed, the longer the candidates' political resumé and the more scrutiny their careers have received in the media and elsewhere, the more information is available to the public about their abilities and policy proposals (Corrales, 2008, p. 3). These expectations are in line with the scholarly literature. Fox and Lawless (2005, p. 646) claimed that political experience is a strong predictor of future involvement in politics. Socialization and practical experience in politics also influence how politicians think about their skills and ability to hold elected positions and, therefore, affect their motivations to pursue a candidacy (Fox & Lawless, 2005, p. 653). According to Berkman (1994, p. 1028), the strongest candidates for Congress, other than incumbents, are experienced politicians. Based on these arguments, we propose the following:

H1: Former first ladies are more likely to run for office when they have experience as elected politicians.

We also propose that first ladies are more likely to run for office when they have a structure of opportunity that gives them more chances to succeed. Since we expect that first ladies who want to compete in elections will use their position strategically, we believe that they will become candidates as soon as they leave office. First ladies may have an “incumbency advantage” when they run for an elected position in the last months of their husbands' term. These females have a high presence in the media, which allows them to influence the public agenda, promote their policy positions, and expose their political skills, commitment, and industriousness. They also enjoy material benefits since they can use some executive resources in their campaigns, including staff members, public funds, and their husband's support. However, these advantages being to decrease once first ladies leave the executive office. We thus propose the following:

H2: First ladies are more likely to run for office in the first available election after they leave the executive branch.

### 3.4 Alternative Explanations

Other factors may also affect the probability that former first ladies will become candidates once they leave the executive power. Ambitious first ladies may have been unable to accumulate elected experience before their husbands reached the presidency. In these cases, first ladies can still demonstrate their ambitions by having an active role in politics (Watson, 1997; Wekkin, 2000; Winfield, 2007). According to Winfield (1997, p. 167), some politically inexperienced American first ladies have helped to formulate, develop, and influence public policies. Following Fox and Lawless (2005), first ladies may actively engage in promoting public policies to prepare the ground for a future political career.

If the conventional argument that former first ladies who run for office are the political heiresses of presidents is correct, then the popularity of their husbands should indicate how competitive former first ladies can be as candidates. Corrales (2008, p. 4) studied candidates with ex-presidents' names due to familial relationship and concluded that these kinds of candidates are often considered the "continuity ticket" since many voters and analysts expect them to primarily maintain the president's political agenda. For first ladies, the popularity of their spouses may influence their own appeal to voters.

Research on women and politics suggests that four factors may relate to the candidacies of former first ladies: the proportion of women in Congress, whether a gender quota was implemented for legislative elections, the country's level of sexism, and the level of female education. The literature that examines the participation of women in Congress has identified a positive cycle in which female legislators encourage other women to run for office and promote the cultural acceptance of women's participation in politics (Williams and Thames 2008; Thames and Williams 2013; Escobar-Lemmon and Taylor-Robinson 2005). When deciding whether to compete in elections, first ladies may consider women's record and experience in their country's legislature to estimate their chances of being elected.

The effective implementation of gender quota laws has been regarded as the decisive factor behind the rise in women's political participation in several Latin American countries (Escobar-Lemmon & Taylor-Robinson, 2005; Htun and Piscopo 2014; Htun, 2015; Folke et al., 2017) because gender quotas reduce the costs women face

when running for office. Quotas may be particularly beneficial to first ladies because party gatekeepers tend to choose women candidates with family links to their party (Jalalzai, 2013, p. 19), and outgoing presidents often have the capacity to influence the selection of party candidates.

Previous research has argued that social attitudes toward women help to explain electoral opportunities for females (Htun & Piscopo, 2014; Norris & Inglehart, 2001; Escobar-Lemmon & Taylor-Robinson, 2005). Therefore, the level of sexism in a country may impact the number of women willing (and able) to run for office. Sexism is a multi-layered phenomenon but expresses mistrust of women as leaders. If too many citizens think that a woman cannot lead, women are unlikely to become competitive candidates, and their lack of confidence in their political abilities may prevent them from trying to compete in an election.

First ladies with political ambitions may be more willing to run for office when women have more opportunities to participate in politics, which occurs in societies with higher levels of socioeconomic development (e.g., Rosenbluth, Salmond, & Thies, 2006). Building on this research, the more educated women are in a country, the more likely they are to reach positions of power. Accordingly, most studies of gender and political candidacies conclude that the remedy for gender disparities in elective office is to produce an increase in women in the pipeline professions (Fox & Lawless, 2004, p. 265).

The literature about political newcomers suggests that the age of democracy (Carreras 2016) and the level of democracy (Corrales 2008) influences the emergence of newcomers, a concept that encompasses all former first ladies without political experience. Since first ladies are well-known public figures and enjoy direct connections to the political elite, they can take advantage of the small pool of available politicians and the inexperienced voters that characterize new democracies to run for office. Although Corrales (2008) claimed that a decline in political rights also offers more opportunities for newcomers, it is theoretically unclear if such a decline also opens the way for female candidates or if it has the opposite effect. Higher levels of democracy may arguably be related to a more inclusive role of women in society and, therefore, to an increase of females in positions of power.

This literature has also related the emergence of newcomers to economic growth, unemployment, and inflation (Carreras 2016, Corrales 2008). In line with these findings, research on women in politics has suggested that more females participate in politics when the economic situation is auspicious (Rosenbluth et al., 2006). Former first ladies may consider the macroeconomic situation in their countries when deciding whether to run for office.

### 3.5 Research Design

The unit of analysis in this chapter is first lady-election year (including presidential and congressional contests) between 1990 and 2016. The data for the 88 first ladies who were available to run for office in the 133 elections covered in the period come from a dataset we built from multiple sources. These include the presidents' and first ladies' websites, first ladies' public speeches, biographies, published interviews, and media outlets. The elections results are from the International Institute for Democracy and Electoral Assistance (<http://www.idea.int/>). Table 13 presents the first ladies considered in the analysis.

**Table 13. First ladies included in the sample**

Country	First Ladies (term)
Argentina	Zulema Yoma (1989-1991; 1992-1995); Zulema Menem (1992-1995; 1995-1999); Inés Pertiné (1999-2001); Hilda “Chiche” González de Duhalde (2001-2003); Cristina Fernández (2003-2007).
Bolivia	Rosario Paz Zamora (1989-1993); Ximena Iturrialde de Sánchez de Lozada (1993-1997; 2002-2003); Yolanda Prada (1997-2001); Virginia Gillum (2002-2002); Elvira Salinas (2003-2005); Fanny Arguedas (2005-2006).
Brazil	Rosane Malta Collor (1990-1992); Ruth Cardoso (1995-2003); Marise Leticia Lula da Silva (2003-2006; 2006-2011); Paula Rouseff (2011-2015).

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Chile	Marta Larraechea (1994-2000); Luisa Durán (2000-2006); Cecilia Morel (2010-2014).
Colombia	Carolina Isakson de Barco(1986-1990); Ana Milena Muñoz (1990-1994); Jacquín Strouss (1994-1998); Nohra Puyana (1998-2002); Lina Morena (2002-2006; 2006-2010).
Costa Rica	Margarita Penón Góngora (1986-1990); Gloria Bejarano (1990-1994); Josette Altmann (1994-1998); Lorena Clare (1998-2002); Leila Rodríguez (2002-2006).
Dominican Republic	Rosa Gómez de Mejías (2000-2004); Margarita Cedeño (2004-2012).
Ecuador	Carmen Calisto Ponce (1988-1992); María Rosa Pulley (1996-1997); Lucía Peña Ochoa (1997-1998); Paola Mahuad (1998-2000); María Isabel Baquerizo (2000-2002); Ximena Bohórquez (2002-2005); María Beatriz Paret (2005-2007).
El Salvador	Margarita Llach de Cristiani (1989-1994); Elizabeth Aguirre de Calderón (1994-1999); Lourdes Rodríguez de Flores (1999-2004); Ana Ligia Mixco Sol de Saca (2004-2009); Vanda Pignato (2009-2014).
Guatemala	Raquel Blandón (1986-1991); Magda Bianchi (1991-1993); Mayra Duque (1993-1996); Patricia Escobar de Arzú (1996-2000); Evelyn Morataya de Portillo (2000-2004); Wendy Widmann (2004-2008); Sandra Torres (2008-2011); Rosa Leal de Pérez (2012-2015).
Honduras	Norma Gaborit (1990-1994); Bessy Watson (1994-1998); Mary Flake (1998-2002); Aguas Ocaña (2002-2006); Xiomara Castro de Zelaya (2006-2009); Siomara Girón (2009-2010); Rosa Elena Bonilla (2010-2014).
Mexico	Cecilia Ocelli de Salinas (1988-1994); Nilda Velasco de Zedillo (1994-2000); Marta Sahagún de Fox (2000-2006); Margarita Zavala de Calderón (2006-2012).

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Nicaragua	Rosario Murillo (1985-1990; 2007-2011); Cristiana Chamorro (1990-1997); María Dolores Alemán (1997-1999); María Fernanda Flores de Alemán (1999-2002).
Panama	Ana Mae Díaz (1989-1994); Dora Boyd (1994-1999); Ruby Moscoso (1999-2004); Vivian Fernández (2004-2009); Marta Linares de Martinelli (2009-2013).
Paraguay	Nélida Reig (1989-1993); María Teresa Carrasco (1993-1998); Mirta Gusinky (1998-1999); Susana Galli (1999-2003); María Gloria Penayo (2003-2008); Emilia Alfaro (2012-2013).
Peru	Susana Higuci (1990-1994); Keiko Fujimori (1994-1995; 1995-2000); Nilda Jara (2000-2001); Eliane Karp (2001-2006); Pilar Nores de García (2006-2011); Nadine Heredia (2011-2016).
Uruguay	Julia Pou (1990-1995); Mercedes Menafra (2000-2005); Lucía Topolansky (2010-2015).
Venezuela	Blanca Rodríguez (1989-1993); Ligia Betancourt (1993-1994); Marisabel Rodríguez (1999-2001; 2001-2004); María Gabriela Chávez (2004-2007; 2007-2013).

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Source: Compiled by the author

The dependent variable *Attempt* is dichotomous and captures whether a former first lady ran for the presidency, vice presidency, or Congress (coded as 1) or not (0).<sup>17</sup> We only considered a former first lady ran for office when she was out of the executive branch or leaving it. Therefore, we excluded first ladies who ran for office while expecting to continue as first ladies (i.e., when the elections took place within their husbands' term, or their husbands ran for reelection).<sup>18</sup>

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<sup>17</sup> We did not include subnational elections because they have generally failed to attract former first ladies. Only two first ladies have run for local elections: Marta Larraechea (Chilean first lady in 1994-2000), elected town councilor in 2000 and Marisabel Rodríguez (Venezuelan first lady in 1999-2004), who failed to be elected major in 2008.

<sup>18</sup> This only led to the exclusion of the election of Cristina Fernández as Senator in Argentina in 2005 and Cilia Flores as Legislator in Venezuela in 2016. We included Rosario Murillo of Nicaragua, who in 2016 ran on the ticket for vice-president with her husband, incumbent President Daniel Ortega, because she had been first lady in 1985-1990.

The variable *Elected* captures the first hypothesis. This variable takes the value of 1 when a woman held an elected political position before becoming a first lady, and 0 otherwise.<sup>19</sup> *First Chance* measures the second hypothesis and is a dichotomous variable that takes the value of 1 when a first lady becomes a candidate in the first available election after leaving the executive power, and 0 otherwise.

As control, we included an alternative measurement of our first hypothesis. Some first ladies may have been politically ambitious but, for any reason, did not have the chance to demonstrate it before running for office. A first lady could show her ambition through her involvement in public policies. Therefore, *Public Policy* takes the value of 1 when the former first lady had hands-on experience in public policies while they were in the executive branch, and 0 otherwise. A majority of former first ladies in the sample participated in public policies during their tenure: 65 out of 88.

We also controlled for the conventional view that former first ladies are more likely to run as candidates because voters see them as their husbands' political heirs. To test this argument, *Popularity* captures the average popular support that former first ladies' husbands had in their last year in office. The data was taken from the Executive Approval Project (Carlin et al., 2016). This variable ranges from 12%, for Peruvian President Ollanta Humala (2011-2016), to 76%, for Salvadoran President Mauricio Funes (2009-2014).

The other controls capture arguments from the literature on women in politics and newcomers. The first research stream proposes that females are more likely to be elected when they have already participated in politics and when there are gender quotas implemented. *Women in Congress* measures the percentage of women who were in the in the single or lower house for any given year, ranging between 2.5% (Paraguay 1993, 1998) and 53.1% (Bolivia 2014). *Quota Adopted* takes the value of 1 when a gender quota law has been implemented to elect legislators (283 out of the 415 of the first lady-election years in the sample), and 0 otherwise. These variables were taken from Hughes et al. (2017).

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<sup>19</sup> First ladies who were vice-presidents, governors, senators, representatives, sub-national legislators, members of constitutional assemblies, mayors, and city counselors were coded as holding an elected political position.

Another argument is related to the general role of women in societies. *Culture* measures the average level of sexism in the countries of the sample. These values were obtained from the World Values Survey (WVS, 2015) question “On the whole, men make better political leaders than women do.” This variable ranges between 0 (strongly disagree with the statement) and 4 (strongly agree). In the sample, *Culture* ranges from 0.96 (Colombia, 2014) to 1.91 (Guatemala, 1990). While the level of sexism in a country reveals how widespread the belief of gender inequality is, the educational attainment of women captures their ability to, among other things, reach positions of power. *Education* measures the average number of years females were schooled in each country. This information was taken from the Educational Attainment Dataset (Barro and Lee, 2015), and ranges between 3.1 (Guatemala 1990) and 10.7 (Colombia 2014).

Research about newcomers suggests that the age and level of democracy may be associated with the opportunities that women have to succeed in politics. We use the Polity IV (Gurr et al., 2016) index to capture two variables. *Democracy Age* records the number of years a country has been a democracy, from 0 (Guatemala 1990, Mexico 1997, and Peru 1995, 2000, 2001) to 95 (Costa Rica 2014), while *Democracy Level*'s values are between -10 (autocracy) and 10 (democracy). In the sample, this variable ranges from -3 (Venezuela 2010 and 2012) to 10 (Chile since 2009, Costa Rica since 1990, and Uruguay since 1994). Scholars within this literature also propose that economic changes offer opportunities for non-traditional candidates. We capture this argument using two variables taken from the World Bank Indicators (2017), GDP Growth and Inflation. Both variables are measured in annual percentages. *GDP Growth* ranges between -6.98% (Peru, 1990) and 12.5% (Paraguay, 2013), while the change in prices, or *Inflation*, is between -1.17% (Argentina, 1999) and 7,485% (Nicaragua, 1990). Given the considerable variation in Inflation, we use its natural logarithm.

### **3.6 Model Estimation**

Because the dependent variables reflect first ladies' attempts to become elected and because our hypotheses refer to individual predictors, we estimated discrete-time duration models in which the unit of analysis is first lady-election year. Using this technique, once a first lady runs for office, she becomes censored and drops from the sample. We did this because we wanted to understand the factors that motivate a first lady

to run for office (i.e., we did not explore the reasons they fail or succeed in their candidatures or why some of them run more than one time).

Since the dependent variable is dichotomous, we estimated the model using probit. Table 14 presents four models. In model 1.1, we introduce the central model. In model 1.2, the two hypotheses interact so we could examine whether former first ladies who were previously elected were more likely to run for office as soon as they leave the executive power. In model 1.3, we excluded elections under authoritarian governments because the former first ladies' motivations to run for office may vary across regime types. The number of observations decreased only by 6.4% in model 1.3 (from 344 to 322). Model 1.4 replicates model 1.3 with a smaller sample. Former first ladies who served for a short period, passed the retirement age, or did not become candidates after numerous opportunities may be unlikely to become candidates. Therefore, in model 1.4, we exclude women who served as first ladies for less than a year, reached the age of 70 without running for office, and did not run after seven elections. This reduced the sample by an additional 17% (to 266 observations).

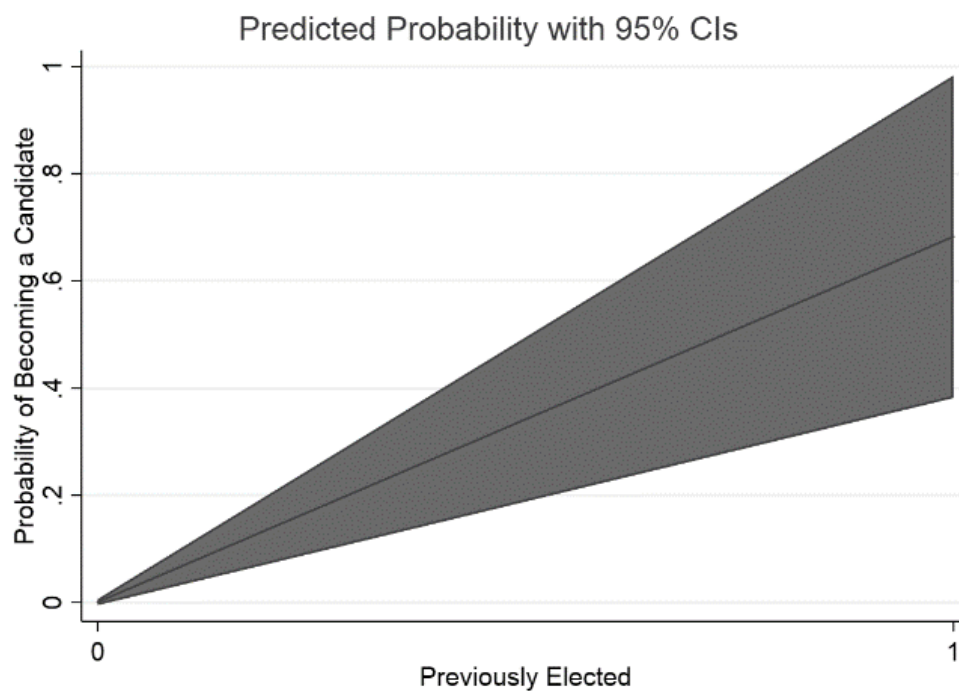
Table 14. Former first ladies who ran for office

	(1.1) Central	(1.2) Interaction	(1.3) Competitive elections	(1.4) Restricted sample
Elected	10.20** (2.65)		10.67** (2.31)	10.75** (2.65)
First Chance	-2.12 (1.35)		-2.05 (1.39)	-2.21 (1.47)
Elected*First Chance		2.38* (0.99)		
Public Policy	6.13** (1.98)	1.20* (0.57)	5.65** (2.05)	5.57* (2.45)
Popularity	0.01 (0.03)	0.00 (0.01)	-0.01 (0.04)	-0.02 (0.04)
Women in Congress	0.06 (0.05)	0.02 (0.02)	0.05 (0.06)	0.06 (0.06)
Quota Adopted	1.61 (1.19)	-0.01 (0.36)	0.08 (1.29)	-0.05 (1.39)
Education	-0.63 (0.49)	-0.13 (0.12)	-0.57 (0.45)	-0.59 (0.58)
Culture	-6.62 (4.62)	-1.18 (0.96)	-8.17* (3.86)	-13.41* (5.65)
Regime Type	0.61 (0.91)	-0.07 (0.25)	0.91 (1.09)	0.91 (1.53)
Democracy Age	-0.03 (0.03)	-0.01 (0.01)	-0.03 (0.03)	-0.04 (0.04)
GDP Growth	0.04 (0.14)	0.05 (0.05)	0.00 (0.14)	-0.14 (0.15)
Inflation (log)	-0.86 (0.60)	-0.15 (0.14)	-0.49 (0.66)	0.13 (0.79)
Constant	1.33 (9.15)	-0.11 (2.09)	4.34 (8.11)	12.26 (10.48)
First Ladies	88	88	88	81
N	344	344	322	266

+ p&lt;0.1, \* p&lt;0.05, \*\* p&lt;0.01

The results in Table 14 indicate support for H1 across all models: former first ladies who previously held an elected position are more likely to run for office. The alternative proxy for political ambition, Public Policy, is also statistically significant across all models. We estimated predicted probabilities to gain an understanding of the substantive impact of Elected and Public Policy. Figure 7 illustrates that when first ladies do not have experience as an elected politician, the predicted probability that they will run for office after leaving the executive power is just 0.06%, but this figure rises to 69% when they have such experience. In contrast, the impact of becoming involved in public policies is much less consequential. When first ladies do not become involved in public policies, the probability that they will become candidates is 0.6%, while engaging in public policies raises the likelihood to 3.5%. In other words, knowing whether a first lady has or does not have experience as an elected politician is critical to anticipate which first ladies will become candidates.

**Figure 7. Political Ambition and Running for Office**



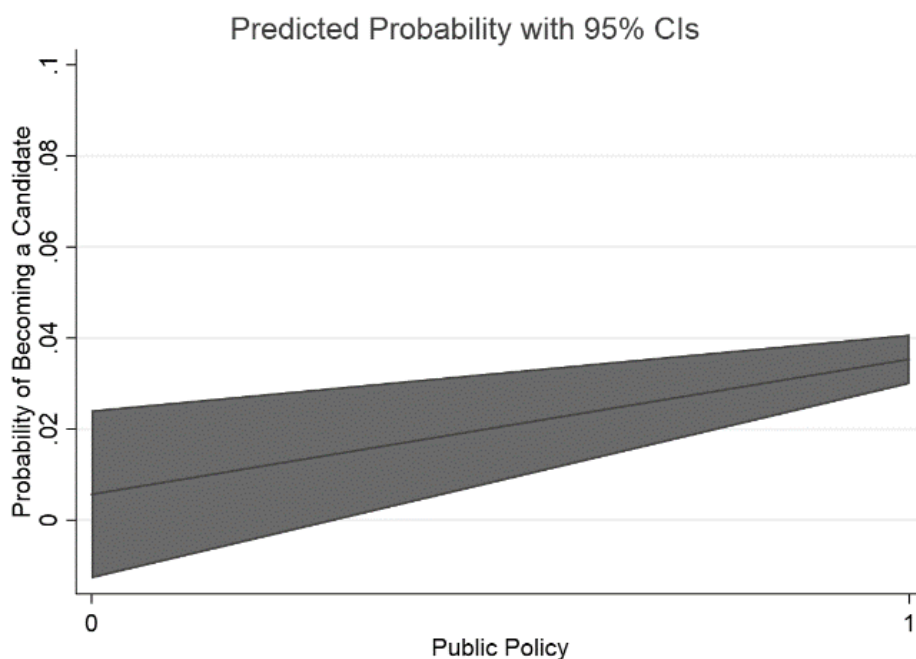


Table 14 suggests no support for H2. First Chance is statistically unrelated to the candidatures of former first ladies. Likewise Popularity, the variable that captures the conventional wisdom, is statistically unrelated. In other words, former first ladies run for office irrespective of whether they face the first chance to compete or the popularity that their husbands had in the last year of their term. These null findings may result from the difficulties that some former first ladies face to become candidates. For example, some were forbidden to run for office because their candidatures violated the constitution. The constitutional court of Guatemala prohibited Raquel Blandón and Sandra Torres from becoming presidential candidates in 1990 and 2011, respectively, while the Peruvian National Jury of Elections prohibited Susana Higuchi from running for Congress in 1995. Other former first ladies' positions were too uncomfortable to allow them to become candidates. For instance, Keiko Fujimori was forced to leave the role in 2000 because her father, President Alberto Fujimori, escaped to Japan amid corruption scandals almost six months after starting his third term. Xiomara Castro was busy protesting the recent overthrow of her husband, Manuel Zelaya, to compete in the November 2009 elections.

Curiously, none of the control variables was statistically significant in any model, except for Culture in models 1.3 and 1.4. These null results suggest that the literature about women in politics and newcomers does not offer much understanding about why

some first ladies become candidates. Former first ladies do not seem to often consider the participation of women in politics (e.g., the number of female legislators and the implementation of gender quota laws) or in society (e.g., women's level of educational enrollment and social support for sexism) when deciding to run for office. Factors that explain the emergence of political newcomers (e.g., the age and level of democracy and the broader economic situation) also remain unrelated to the candidacy of former first ladies. Thus, the control variables' null results collectively reinforce our proposition that the personal trajectory of first ladies is central to understanding first ladies future involvement in politics.

Model 1.2 reveals that former first ladies who held an elected position before reaching the executive seat are more likely to run for office at the first available opportunity. The positive result of the interaction between the two hypotheses reinforces the proposition that previously elected first ladies should be regarded as strategic actors who use their position to become competitive candidates once able.

Table 15 presents our test of four alternative model specifications to check the robustness of our results. In model 2.1, we replace *Elected* with *Non-Elected* to examine whether a woman who had non-elected political experience before becoming a first lady was also more likely to run for office. This variable takes the value of 1 when a first lady was a minister, vice-minister, ambassador, consul, or party leader and 0 otherwise. Considering that more female politicians "normalize" the participation of women in positions of power and encourage other women to follow their lead (Williams and Thames 2008; Thames and Williams 2013; Escobar-Lemmon and Taylor-Robinson 2005), model 2.2 adds *Diffusion* to test whether a former first lady is more likely to run for office when a predecessor has become a candidate. This variable takes the value of 1 when a former first lady has already been a candidate for Congress or the executive in the same country, and 0 otherwise. In model 2.3, we added *Region*, a dichotomous variable that captures whether South American first ladies are more likely to run for office than their counterparts in Central America, Mexico, and the Dominican Republic. In model 2.4, we included *Leftist*, a variable that takes the value of 1 when there is a leftist government in power in a given election and 0 otherwise. The purpose of this variable was to test the argument of Escobar-Lemmon and Taylor-Robinson (2005), who suggested that leftist presidents create opportunities for women. This variable was taken from Arana (2017).

Finally, in model 2.5, we added the level of GDP per capita, obtained from the World Bank, as a further test of the argument that the economic situation affects women's opportunities in politics.

**Table 15. Alternative Specifications**

	(2.1) Non- Elected	(2.2) Diffusion	(2.3) Region	(2.4) Leftist	(2.5) GDP per Capita
Elected		9.14** (2.50)	13.47** (2.88)	15.17** (2.76)	9.38** (2.14)
First Chance	0.39 (0.29)	-1.82 (1.21)	-2.73+ (1.60)	-3.15+ (1.64)	-1.95 (1.24)
New Variable	0.54+ (0.30)	0.81 (0.99)	0.82 (1.43)	0.09 (1.06)	0.00 (0.00)
Public Policy	1.02* (0.45)	5.81** (2.03)	7.87** (2.27)	9.32** (2.36)	5.27** (1.91)
Popularity	0.01 (0.01)	0.01 (0.03)	0.00 (0.04)	0.00 (0.04)	-0.01 (0.04)
Women in Congress	0.03* (0.01)	0.04 (0.05)	0.06 (0.05)	0.08 (0.06)	0.04 (0.05)
Quota Adopted	0.18 (0.34)	1.57 (1.13)	2.16 (1.38)	2.19 (1.40)	0.17 (1.21)
Education	-0.08 (0.11)	-0.58 (0.46)	-0.63 (0.56)	-0.78 (0.61)	-0.55 (0.45)
Culture	-1.19 (0.92)	-6.31 (4.12)	-8.05+ (4.72)	-8.56 (6.09)	-6.42 (4.08)
Regime Type	0.00 (0.23)	0.70 (0.87)	0.63 (1.05)	0.80 (1.16)	1.32 (1.08)
Democracy Age	-0.01 (0.01)	-0.03 (0.03)	-0.04 (0.03)	-0.04 (0.04)	-0.02 (0.03)
GDP Growth	0.08+ (0.04)	0.04 (0.13)	0.04 (0.15)	0.02 (0.16)	0.03 (0.13)

Inflation (log)	0.02 (0.15)	-0.72 (0.56)	-1.02 (0.66)	-1.14 (0.70)	-0.52 (0.55)
Constant	-1.34 (1.97)	1.00 (8.31)	0.08 (9.72)	-0.31 (12.10)	1.86 (7.97)
First Ladies	88	88	88	88	88
N	344	344	344	343	336

+ p<0.1, \* p<0.05, \*\* p<0.01

Among all the variables included, only Non-Elected was statistically significant at the 0.90 level. This result reveals that any previous political experience, either as an elected or appointed politician, increases the chances that a first lady will run for office. However, the predicted probabilities of becoming a candidate are much higher for those who have experience as an elected officer (69%) rather than as an appointed one (11%). This difference is consistent with our theory: elected first ladies have demonstrated a strong political ambition. In contrast, appointed politicians are not necessarily politically ambitious: they may be motivated to work for professional or technical considerations. Moreover, they lack the experience in running a successful political campaign.

### 3.7 Conclusion

This article examined, for the first time, which former first ladies compete in elections in Latin America. While conventional descriptions tend to depict these women as their husbands' political heiresses, we propose that first ladies who run for office should be regarded as strategic politicians that take advantage of their ceremonial role to become competitive candidates after stepping down from the executive office. We found strong support for our theory: there is a 69% chance that a first lady with experience as an elected politician will run for the presidency, vice presidency, or Congress, while the likelihood is less than 1% otherwise. First ladies who engage in public policies are also more likely to run for office, but the chances are only 3.5%. Although we did not find support for our expectation that first ladies would become candidates in the available first election after leaving office, we did find that politically experienced first ladies are likely to take advantage of their first electoral chance. The factors associated with the

participation of women in politics and newcomers were unrelated to first ladies' attempts to run for office. In sum, the explanation for which first ladies will compete in elections is rooted in their political trajectory.

The irruption of first ladies as competitive politicians introduces a conceptual challenge to the growing literature on women and politics. Higher rates of women participating in politics constitute an improvement regarding representation and democratic legitimacy (Ballington & Karam, 2015). Former first ladies who become elected politicians can help balance the gender disparity in politics and promote the entrance of more females into the electoral arena. Furthermore, like other women in positions of power, they can endorse public policies that help to close gender disparities in society (Ballington & Karam, 2015; Inter-Parliamentary Union, 2014). However, politicized former first ladies can also create problems in democratic governance, potentially contributing to a personalization of politics. When this occurs, the name and image of the candidates become more important than the ideas and projects they represent.

Furthermore, these women may limit the circulation of members in the political elite. In Latin America, there is already a large number of former presidents running for the presidency, as well as “political dynasties” in which powerful families control several political positions. If more former first ladies enter the electoral arena, it may become increasingly difficult for new politicians, including women from less influential backgrounds, to be elected to the highest offices.

This study opens avenues for further research. First, which first ladies become elected remains unclear. Is it mainly due to their characteristics or does the broader context provide a better explanation? Second, do elected former first ladies promote gender equality policies? Third, qualitative researchers can examine how political couples who reach the presidency work to advance their political careers as a team. For instance, it would be of interest to discover more about the role that male presidents play in former first ladies' campaigns and their subsequent performance if ex-first ladies succeed. These topics seem increasingly relevant because former first ladies have proven to be highly competitive candidates and seem to have permanently entered the electoral arena.

## **Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016**

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## 4.1 Introduction

A new trend emerged in 1999 in Latin American elections. For the first time, a former first lady (Uruguayan first lady María Julia Pou [1990-1995]) won a seat in the Senate. Since then, in a growing number of countries, not only have ex-presidents (Corrales, 2008), president's relatives (Alcántara, 2012; Corrales, 2008; Joignant, 2014; Malamud, 2014; Serrafiero, 2015; Zovatto, 2014) and newcomers (Carreras, 2012, 2017; Corrales, 2008) run for office, but also former first ladies<sup>20</sup>. The irruption of former first ladies in the electoral arena is unlikely to be a temporary trend. The move from spouse to candidate seems a logical next step for women immersed in the political sphere and who were often drawn there by their own education, interests, and ambitions as much as by any spousal relationship (Anderson, 2002, p. 108). However, despite the increasing importance of these candidacies in national politics, no past work has tried to analyze the political capital of former first ladies who have run for elected positions. This research aims at closing this knowledge gap using an empirical approach.

Some first ladies play an active role in politics during their husbands' presidential terms and continue in politics later. Several scholars agree that, over time, the role of first ladies in the United States has become more political (Burns, 2004; Eksterowicz & Paynter, 2000; Mayo, 2000; Muir & Benitez, 1996; Page, McClanahan, & Weiss, 2008; Wasserman, 1995; Watson, 1997; Wekkin, 2000; Winfield, 1997). In Latin America, the role of first ladies has become so political that the position itself offers an excellent platform to accumulate political capital and to enter the electoral arena. Some former first ladies have consequently utilized their accumulated political capital and ran for office. In the post-presidential years, 20 former first ladies have become candidates 26 times and were elected on 19 occasions. These candidates have become presidents (two times), vice

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<sup>20</sup> Latin American reality demonstrates that the first lady is not always the wife of the president. The position has been held by daughters, sisters, sons, husbands, and in some cases been vacant. However, in this paper, the first lady is assumed to be female and addressed as a "she" because the "traditional" first lady as wife of a male president is by far the most frequent occurrence. The majority are women (wife, daughter, or sister) and only recently have former first ladies been nominated for elections. The concept of the first lady is understood as the person who uses the non-elected elite position of the first lady in the executive branch, no matter her relationship with the president.

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#### Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016

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presidents (three), and legislators<sup>21</sup> (eight in unicameral congresses, five senators, and one deputy in bicameral legislatures).

The concept of political capital is frequently used by politicians and journalists when discussing elites. Political capital is a varied set of resources originating both within and outside the political field (Joignant, 2015). The political capital of former first ladies varies widely. For instance, former first ladies have entered politics through different paths. Some became candidates only after leaving the executive branch, and their campaigns were explicitly related to the leadership of their husbands or fathers. These women did not have previous political experience before entering the political arena. However, others were already politicians with electoral political experience before becoming first ladies.

There are significant theoretical and empirical reasons for the political capital of elected former first ladies in Latin America, and these reasons can be understood with a comparative approach. This topic connects to many current debates in political sciences, as well as to political elites, family political capital, political careers, newcomers, and personalization of politics, amongst others. This research is relevant for at least three reasons. First, the strategic use of the first lady's position for electoral purposes raise questions about the legitimacy and legal status of the role. First ladies are not fully vertically and horizontally accountable for their actions (Broyde & Schapiro, 1998; Wasserman, 1995). The vagueness of the role has some advantages for the first lady. The position without portfolio, statutory legitimacy, electoral mandates, or clearly defined roles and responsibilities (Watson, 2003, p. 434) allows for flexible performance. The role of the first lady in the government is an increasing issue in the political debate. Her political performance within the government; her influence on politics; and her relationship with the cabinet, Congress, other politicians, voters, and the press are some points of controversy.

Second, the candidacy of an ex-first lady strengthens dynastic relations in the political elite. Dynastic politicians are those related by blood or marriage to other

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<sup>21</sup> I use the term legislator for members of parliament in a unicameral system in order to differentiate between unicameral and bicameral systems although in some countries these members of parliament are called differently. For example, the members of the unicameral parliament are called deputies in Venezuela and assembly member in Peru.

individuals formerly holding political office (Dal Bó et al., 2009; Folke et al., 2017; Geys & Smith, 2017). Political dynasties have long been present in democracies, raising concerns that inequality in the distribution of political power reflects imperfections in democratic representation (Dal Bó et al., 2009, p. 115). In Latin American politics, the use of family relationships to drive the development of a political career is a common pattern in the last century (Alcántara, 2012, p. 284). Adding former first ladies to the list of political family members that rotate in positions of power in Latin America will make those families more powerful, restricting the competitiveness of regional political systems (Arana Araya, 2016b). Third, the existing literature on first ladies suffers from many weaknesses. For instance, most studies only consider the U.S. reality. Therefore, Latin American first ladies have rarely been the focus of empirical and comparative studies, which is surprising given the prominent role first ladies play in Latin American politics. The study of former first ladies' political capital contributes to an unexplored research topic and is a compelling issue for elite executive research.

Politicians added three elements of capital during their career: public visibility, negotiation and social skills, and access to political and economic networks (Alcántara, 2012, pp. 125–126). The position of the first lady allows her to accumulate these three elements as each political actor. The first lady's different roles allow her to accumulate political capital.

Winfield (1997, p. 167) identifies four roles. In the escort role, the wife is mentioned by virtue of accompanying her spouse, not because of any independent function. A first lady in the protocol role leads fashionable society at social, ceremonial, and diplomatic events. For the noblesse oblige role, the first lady focuses on charitable and good works concerned with orphanages, the homeless, or the poor, which represents the natural extension of women's volunteer work in the community. Finally, in the policy role, the wife helps formulate, develop, and influence public policy issues. All these roles contain in some degree public visibility. While the escort, protocol, and noblesse oblige roles involve the use of social skills, the policy role implies influence on the agenda, promotion of public policies, contact with politicians and members of the parliament, and the acquisition of political experience. Also, the first lady's performance includes access to political and economic networks.

For instance, the first lady is covered by the media for the whole presidential mandate. As a consequence of the media coverage, the first lady's political impact and public visibility may be much higher than that of ministers, parliamentarians, regional authorities, and even the president. Watson (1997, p. 816) mentioned that many first ladies have been among the most well-known and popular politicians of their time. For example, polls indicated that Nadine Heredia was more popular than her husband, Peruvian President Ollanta Humala (2011-2016) (Ipsos, 2013). The popularity of the first lady is an essential factor, but unfortunately, the majority of public polls do not measure the first lady's approval.

First ladies can also inherit political capital. They, as members of political dynasties, enjoy family name recognition, benefit from press coverage, and can use their husbands' or fathers' political networks (Lee, 2017, p. 379). Feinstein (2010, p. 576) identifies two broad types of advantages that dynastic politicians enjoy: capital and brand name. Capital advantages are the resources and skills political heirs receive. Brand name advantages are benefits candidates enjoy due to their family ties to elected officials. For instance, some former first ladies used the president's name during their candidatures.

The role of the first lady during the government is an increasing issue in the political debate. Her political performance within the government; her influence on politics; and her relationship with the cabinet, Congress, other politicians, voters, and the press are some points of the controversy. Watson (1997, p. 806) pointed out that the definition of the "proper" role of the first lady has produced criticism and public debate. Wekkin (2000, p. 608) complemented this statement by arguing that some roles and behaviors are thus more likely than others to attract elite and popular support. Jalalzai's (2013, p. 19) study found that family ties reinforce "feminine" characterizations of women as political proxies. In this sense, the first lady is the feminine part of the government. Indeed, the first lady's performance as a member of the government is not unnoticed.

This article analyses the personal and institutional conditions of political capital on former first ladies' electoral success in 18 Latin American countries since 1990 using QCA. The remainder of this article is organized as follows. Section 4.2 presents the literature review on the topic. Section 4.3 deals with the concept of former first ladies' political capital and presents a set of hypotheses, while Section 4.4 provides the

methodology and data from an original dataset. Section 4.5 presents the empirical findings with regards to the sufficient and necessary conditions that influence the election of a first lady. The final section discusses the implications of these findings and potential extensions to this research.

## 4.2 Literature Review

Despite remarkable studies in literature on elites<sup>22</sup>, the concept of the elite is both narrow and broad (Hoffman-Lange, 2007, p. 910). The most straightforward definition of political elite refers to people who occupy a relevant place in politics and participate in the decision-making process (Arana Araya, 2018; Hoffman - Lange, 2007; Joignant, 2011). Arana (2018) pointed out that *de jure* elite members control the top positions in the three powers of the state, while *de facto* members exercise influence from the shadows, based on their prominent role in society.

Although it is common to refer to the elite as a homogenous group, it is not easy to identify the individuals who form it. Hoffman-Lange (2007, pp. 912–913) recognized three basic methods of elite identification: the reputational, the decisional, and the positional. The reputational; method relies on experts who are asked to name the most powerful individuals in the community or another political system. The decisional identifies elites by studying the decision-making process for important policy issues. Finally, the positional method is customarily used for studying national elites, but it can be equally well-applied to smaller settings. This method is based on the assumption that, in modern societies, power and influence are tied to the resources associated with positions of leadership in public institutions and private organizations of national relevance. Regarding territorial levels, the political elites can be classified in

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<sup>22</sup> The study of elites began with the investigations of Mosca (1896), Pareto (1900), and Michels (1915), who began to systematically analyze how privileged individuals exercise influence in society (Arana Araya, 2018). The research focused on elites has been mainly developed by sociologists, historians, and political scientists, each discipline with a different perspective. The study of political elites in Latin America began with the influential work of Lipset and Solari (1967), which highlights the significance of the topic in this particular region. Recently, three journals have published a special edition on elites: *América Latina Hoy* (64, 2013), *Colombia Internacional* (87, 2016) and *Política* (54, 2016). For instance, some articles focused on presidents (Alcántara, Barragán Manjón, & Sánchez, 2016; Arana Araya, 2016a) and Ministers (Chasquetti, Buquet, & Cardarello, 2013; González-Bustamante & Olivares, 2016; Inácio, 2013; Ollier & Palumbo, 2016)

supranational, national, local, or regional. Most frequently, however, the elite concept is used for the national level.

The concept of “political capital” is frequently used by politicians and journalists when discussing elites. In fact, each member of the elite has political capital. However, the definition of political capital is still open to debate. Alcántara (2017, p. 191) mentioned that the ambiguity of this concept causes severe difficulties in its operationalization and measurement.

Despite multiple definitions, there is a certain consensus that political capital is a set of power resources owned by a politician. Norris (1997, p. 209) defined political capital as all the assets that facilitate a political career, which vary by party, such as a record of party service, financial resources, or political networks. In the same way, Joignant (2015) defined the term as a varied set of resources originating both within and outside the political field. The underlying assumption across political capital’s studies is that there is not just one type and it has different sources.

Political capital is strongly related to a member of the elite’s political career. Alcántara (2017, p. 188) mentioned that the interaction of political career and political capital is a dependent variable in relation to a particular object of study but is an independent variable when explaining the political system and the quality of it. He proposed the study of the different stages of a political career, according to politicians’ use of political capital. In this regard, the professional and personal trajectories of politicians are processes of accumulation of different types of political capital. Joignant (2012, p. 601) identified two types of accumulation: primitive and strategic. Primitive accumulation is acquired early, such as the prestige of a surname or family networks. In contrast, strategic accumulation begins when the elite member enters politics, such as the change from one position to another. In both cases, as Bennister et al. (2015, p. 419) stressed, relations and networks matter in the generation of political capital.

Bourdieu (1981, pp. 18-19) described two types of political capital: personal and delegate. Personal political capital consists of a politician’s positive reputation, fame, and popularity based on specific qualifications. Conversely, the delegate political capital is a product of a limited and temporary transfer of political capital owned by an institution. Following Bourdieu, Joignant (2012, p. 610) developed more specific types of political

capital and its agents: family capital (heir/heirress), university capital (student leader), political capital (party man and professional politician), technocratic capital (pragmatic technocrat and political technocrat), technopolitical (technopols), fame capital (celebrity), and charismatic capital (charismatic leader). Joignant, Perello, and Torres (2014, p. 88) noted that family capital is the only type that does not need to be actively acquired by an aspirant to the political elite.

Recent studies have focused on the possible candidature of a president's relatives in Latin America (Alcántara, 2012; Corrales, 2008; Joignant, 2014; Malamud, 2014; Serrafiero, 2015; Zovatto, 2014). These candidates are dynastic politicians. Dynastic politicians are those related by blood or marriage to other individuals formerly holding political office (Dal Bó et al., 2009; Folke et al., 2017; Geys & Smith, 2017). The family legacy, belonging to a family with background and experience in politics, provides the candidate with symbols, contacts, and networks (Alcántara, 2013). Corrales (2008, p. 4) defines this group as candidates who have the same last name as an ex-president due to a family relationship (such as a spouse, former spouse, or family member). These candidates are often considered the "continuity ticket" since many voters and analyst expect them to primarily maintain the program associated with the president whose last name they bear.

Joignant (2014, p. 20) determined that family political capital is represented by the surname (e.g., recognition as a reputable brand name for an audience of voters, transmission of skills and interest in politics, heritage contacts, and a social area functionally useful when raising money for an election campaign) or by networks contracted through marriage strategies. He analyzed the concept of family political capital by gathering biographical information on political relationships (defined as the volume and type of family political ties) for Chile. He concluded that the legacy of family capital provides a significant electoral advantage, often decisive for those who benefit from it, skewing the competition in elections. The name is not only an advantage to enter into politics and run for an election, but also to win. However, family political capital is not limited to the name of the politicians; it is also political networks, resources, and influence. Finally, Joignant (2014, p. 29) noted that there is a lack of research on the dynamics of transferring capital between a married couple, but a plausible hypothesis is that wives inherit capital from their husbands.

Family political capital can be a crucial advantage in an election. Feinstein (2010, p. 576) identified two broad types of advantages for dynastic politicians: capital and brand name. Capital advantages are the resources and skills that political heirs receive. Brand name advantages are benefits candidates enjoy due to their family ties to elected officials. The studies agree that candidates with names of other politicians are favored at the expense of new candidates (Arana Araya, 2016b; Joignant, 2014).

Dynastic politicians have a higher probability of winning elections than non-dynastic candidates even after controlling for other individual characteristics (Feinstein, 2010; Smith, 2012; Asako et al., 2015; Bohlken and Chandra, 2015; Daniele and Vertier, 2016) (Geys, 2016, p. 1). These politicians seem to have an “incumbency advantage” when they run for an elected position in the last months of their relatives’ term. Feinstein (2010, p. 594) proved that the dynasty advantage is similar to other proven electoral advantages and is approximately half of the well-established incumbency advantage.

Dynastic politicians are men and women. However, Folke et al. (2017, p. 1) found that throughout history and across countries, women appear more likely than men to enter politics at the heels of a close relative or spouse. In the same line, Jalalzai (2013, p. 19) demonstrated that party gatekeepers mobilize women candidates with family links because of perceived advantages. These women candidates use their family political capital to improve their chances to win. In this sense, Lee's (2017, p. 380) study suggested that women who inherited political capital from their family members generally emphasized that connection. In summary, the mix of political networks, resources, influence, and name recognition can impact a female candidate’s family political capital.

### **4.3 Personal and Delegate Political Capital**

A first lady can accumulate political capital before, during, and after her time as the first lady. In this context, determining the role the first lady’s position plays in her future political career is pertinent. Is the position a springboard to politics, is it a unique event in her life, or is it just one position amongst others in politics? Does the first lady use her political capital as an advantage to win an election? What conditions could benefit a candidature of a former first lady in a particular context? There is no magic formula to explain a candidate’s success because the reasons people vote for a politician are diverse.

However, the empirical analysis of a first lady's political capital that could favor her success in an election helps to clarify the phenomenon in specific contexts.

A first lady possesses the two types of political capital described by Bourdieu (1981): personal and delegate. Her personal political capital includes her previous activities, as well as her activities during her time as the first lady. The delegate political capital, however, is conditioned by the president's reputation and the time of the candidature. These conditions consider the former first lady's entire career pathway (before becoming the first lady and during her time as the first lady).

The first condition of personal political capital is previous experience in electoral politics<sup>23</sup>. Every former first lady has experience in politics at least from the moment she becomes the first lady. However, this variable refers to political expertise in a popular election before becoming the first lady. A former first lady without electoral political experience is considered a newcomer. The definition of newcomers, or outsiders, is still discussed among academics, but the use of "newcomers" focuses on political experience while "outsider" is related to the party system. Literature about newcomers in Latin America has increased in the last several years. Some authors have emphasized the absence of the electoral experience of candidates. For instance, Corrales (2008, p. 5) considered those who ran for president with no prior electoral experience (running for political office) and no significant experience in public administration newcomers.

In contrast, first ladies who have experience as elected politicians have already demonstrated ambition to compete for political office. Furthermore, their socialization into politics allows them to have confidence in their abilities to develop a political career, and they can enjoy the respect of voters who demand guarantees that they can perform well in elected offices. Presidents' wives with policy knowledge have, therefore, understood the importance of limiting their agenda and clarifying their goals (Borrelli, 2011, p. 30). These expectations are in line with the scholarly literature. Fox and Lawless (2005, p. 646) claimed that political experience is a strong predictor of future involvement in politics. Socialization and practical experience in politics also influence how politicians think about their skills and ability to hold elected positions and, therefore, affect their

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<sup>23</sup> Elected positions are vice presidents, governors, senators, representatives, sub-national legislators, members of constitutional assemblies, mayors, and city counselors.

motivations to pursue candidacy (Fox & Lawless, 2005, p. 653). According to Berkman (1994, p. 1028), the strongest candidates for Congress, other than incumbents, are experienced politicians. Based on this argument, I expect the following to be true:

H<sub>1</sub>: Former first ladies are more likely to win an election when they have previous electoral experience.

The second condition of personal political capital is a first lady's performance within the government. Many factors, at personal, institutional, societal, and public policy levels, determine the first lady's activism and contribute to her performance (Erickson & Thomson, 2012, p. 57). First ladies often participate in domestic and international politics beyond their activities related to protocol. In national politics, some first ladies inaugurate social infrastructure (hospitals, schools, and other social institutions), participate in social events and political activities at the local level, give interviews to magazines and television channels, receive international visitors, promote policies and programs, and influence the presidential agenda. In the international arena, these women represent the government in travels, sign agreements with other countries, and participate in presidential summits and their own meetings (Eksterowicz & Hastedt, 2006; Erickson & Thomson, 2012). In summary, first ladies can be an active part of the government on national and international issues (Patel, 1998)

A first lady with an active role during the president's term has direct contact with the citizenship, other politicians, and the press. The first lady can use her position as a pre-campaign exercise. Thus, an active role should help generate political networks, popularity, policy expertise, and financial support. The hypothesis derived from this argument is as follows:

H<sub>2</sub>: A first lady with an active political role increases her electoral success for a later candidature.

Regarding the delegate political capital, the office of the first lady could impact the success of the first lady's nomination. The first lady has formal or informal support during her mandate within the government. The first lady's institutional support may be an office within the institutional presidency, a secretary within the institutional presidency, a foundation within a ministry, or a non-formal office. This condition will measure whether the country has an official office of the first lady. The existence of a

formal office or secretary implies that the role of the first lady is recognized as part of the government. Also, an official office provides financial, human, technical, and political resources to the position. Thus, I suggest the following hypothesis:

H<sub>3</sub>: A first lady with a formal office has a greater chance to win an election.

Another condition of delegated political capital is the use of the president's name. Delegate leadership is the explicit transfer of family political capital from the president to the first lady. In this case, the president's family name is used because it is recognized. In the majority of Latin American countries, changing a surname is not allowed<sup>24</sup>, but it is possible to add the suffix "de" and the spouse's surname. In other cases, the first lady is the daughter of the president and has his surname. Geys and Smith (2017, p. 10) found that women are more likely to employ their husband's surname for political purposes when married to someone with a recognized surname (defined as a surname linked to someone who held an important political office in the past) and are less likely to use their husband's surname when their own surname is recognized. This reflects a strong belief that there is a (political) benefit in choosing the "correct" surname when entering the political arena. Also, Simonton (1996, p. 330) concluded that the president's reputation contributes directly to the first lady's reputation, but any reciprocal influence is absent. In this sense, the strategic use of the surname can capitalize the president's reputation. Thus, I propose the following hypothesis:

H<sub>4</sub>: First ladies with presidents' names have greater chances of electoral success.

#### 4.4 Methodology and Data

Using the positional method to identify members of the political elite proposed by Hoffman-Lange (2007), the study broadly considers all former first ladies: not only the wife of the president but also other relatives who, despite their different ties to the president, were in positions equivalent to that of the first lady.

<sup>24</sup> In accordance with Latin American naming conventions, the first surname of a person is from the father and the second from the mother. Except in Brazil where the name's order is reversed: the first name is from the mother and the second is the father's name. It also possible, in some countries, for women to include their husbands' surnames by adding the suffix "de". Usually, the husband's name come after the first name. For example, Xiomara Castro Sarmiento (first lady of Honduras 2006-2009) is known as Xiomara Castro de Zelaya. In some cases, first ladies changed their names officially and, in others, the press who changes them.

## Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016

The analysis focuses on former first ladies' political capital affecting their candidature and possibly encouraging a successful nomination. Mainly, I am interested in exploring under what conditions a former first lady's political capital would impact her success in elections. The outcome is elected former first lady in Latin American at national elections<sup>25</sup> from 1990 to 2016. Regarding the candidature, I count only the first nomination at any time after her term as the first lady. A former first lady could run more than once for the same or different positions. However, the conditions directly related to her position are evident in the first lady's first attempt after leaving her post. Therefore, the study only considers a former first lady's first attempt in national elections.

The research follows a comparative area studies approach. This intraregional comparison reviews all nominations of former first ladies in Latin America. Thus, the political careers of all former first ladies between 1990 and 2016 in 18 countries were considered: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela.

**Table 16. First ladies included in the analysis**

Country	Name	Previous political experience (Post, Term)	Term as first lady	Post-candidacy (Target office, year)	¿Elected?	Term
Argentina	Hilda "Chiche" González de Duhalde	Deputy, 1997-2003	2002-2003	Deputy, 2003	Yes	2003-2005
				Senator, 2005	Yes	2005-2011
	Cristina Fernández de Kirchner	Deputy 1989-1995 Senator, 1995-1997	2003-2007	President, 2007	Yes	2007-2011
		Deputy, 1997-2001 Senator, 2001-2005		President, 2011	Yes	2011-2015

<sup>25</sup> The study includes national elections for president, vice president, and Congress and excludes subnational elections. Only two former first ladies have run for local elections: Marta Larraechea (Chilean first lady in 1994-2000), elected town councillor in 2000, and Marisabel Rodríguez (Venezuelan first lady in 1999-2004), who failed to be elected mayor in 2008.

## Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016

		Senator, 2005-2007				
Costa Rica	Gloria Bejarano Almada	Without political experience	1990-1994	Legislator, 2010	Yes	2010-2014
	Margarita Penón Góngora	Without political experience	1986-1990	Legislator, 2002	Yes	2002-2005
Dominican Republic	Margarita Cedeño	Without political experience	2004-2012	Vice-president, 2012	Yes	2012-2016
				Vice-president, 2016	Yes	2016-2020
Ecuador	Ximena Bohórquez Romero	Legislator, 2003-2006	2003-2006	Legislator, 2007	Yes	2007-2008
Guatemala	Raquel Blandón de Cerezo	Without political experience	1986-1991	Vice-president, 2011	No	-
	Patricia Escobar de Arzú	Without political experience	1996-2000	President, 2011	No	-
	Sandra Torres	Without political experience	2008-2011	President, 2015	No	-
Honduras	Xiomara Castro de Zelaya	Without political experience	2006-2009	President, 2013	No	-
Nicaragua	María Dolores Alemán Cardenal	Without political experience	1997-1999	Legislator, 2006	Yes	2007-2011
	María Fernanda Flores de Alemán	Without political experience	1999-2002	Legislator, 2016	Yes	2017-2022
	Rosario Murillo	Legislator, 1984-1990	1985-1990 2007-2016	Vice-president, 2016	Yes	2017-2022
Panamá	Marta Linares de Martinelli	Without political experience	2009-2013	Vice-president, 2014	No	-
Paraguay	Mirta Gusinky	Without political experience	1998-1999	Senator, 2013	Yes	2013-2018

## Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016

	Emilia Alfaro de Franco	Deputy, 2008-2013	2012-2013	Senator, 2013	Yes	2013-2018
Perú	Susana Higuchi	Without political experience	1990-1994	Legislator, 2000	Yes	2000-2001
				Legislator, 2001	Yes	2001-2006
	Keiko Fujimori	Without political experience	1994-2000	Legislator, 2006	Yes	2006-2011
				President, 2011	No	-
				President, 2016	No	-
Uruguay	María Julia Pou	Without political experience	1990-1995	Senator, 1999	Yes	2000-2005
	Lucía Topolansky	Deputy, 2000-2005 Senator, 2005-2010 Senator, 2010-2015	2010-2015	Senator, 2014	Yes	2015-2020

Source: Compiled by author

To enable a cross-case analysis, I created an original dataset with information on all former first ladies who have run as candidates. The information was collected from multiple sources: archival research; official documents (e.g., constitutions, laws, court decisions, decrees [executive orders], memoranda); presidents' and first ladies' websites; first ladies' public speeches; biographies; published interviews; and media outlets.

The study attempts to explain the outcome “elected former first lady” through a QCA. I used crisp-set of QCA (csQCA). Many QCA analyses are various combinations of constraints and motivation variables, and QCA's stress on interaction terms makes it a natural way to examine causal combinations that include constraint variables (Goertz, 2017, p. 130). According to Santos, Pérez-Liñán, and García Montero (2014), QCA allows researchers to systematically analyze all possible combinations of causal conditions to identify mechanisms of conjunctural causality, or configurations of factors sufficient to produce the result of interest. Also, QCA allows one to perform a systematic treatment of the counterfactuals (i.e., configuration causes for which there are no observations), which is not possible in a quantitative analysis. For the QCA analysis, the operationalization of conditions are presented in Table 17.

**Table 17. Operationalization of conditions of the political capital of former first ladies**

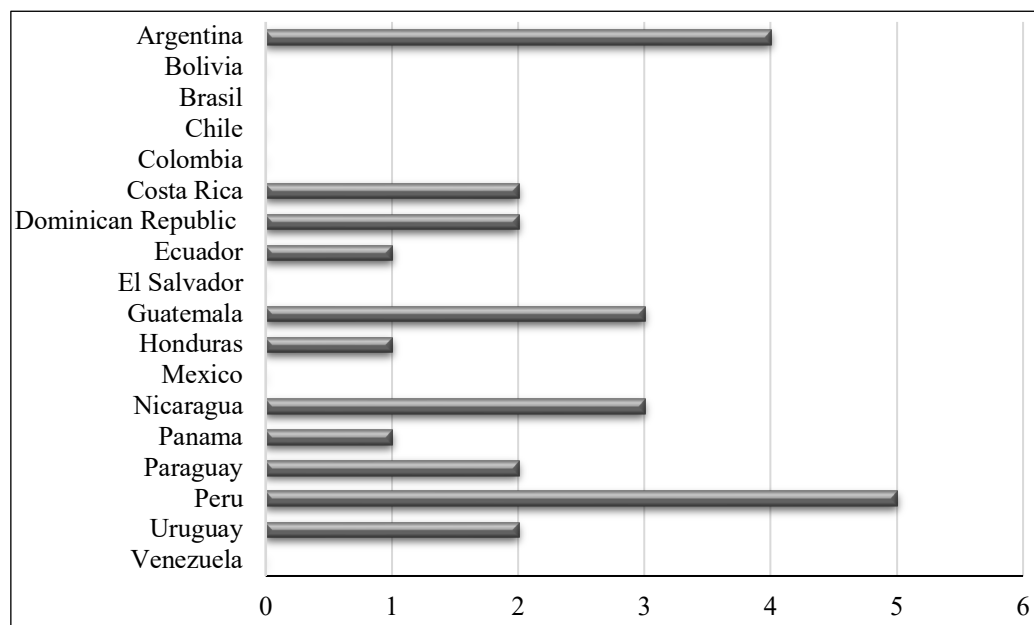
	Conditions	Operationalization	csQCA
X <sub>1</sub>	Personal political capital	Previous political experience	1
		Without previous political experience	0
X <sub>2</sub>	Personal political capital	Active role as a first lady in politics	1
		Not active role as a first lady in politics	0
X <sub>3</sub>	Delegate political capital	Office of the first lady	1
		No office of the first lady	0
X <sub>4</sub>	Delegate political capital	Use of the president's name	1
		Do not use of the president's name	0

Source: Compiled by the author

Although the QCA analysis only focuses on a former first lady's first attempt at election, the next section provides a general descriptive analysis of all candidatures to illustrate the overall picture of former first ladies in Latin American elections.

#### 4.5 Descriptive Analysis of Former First Ladies Candidacies

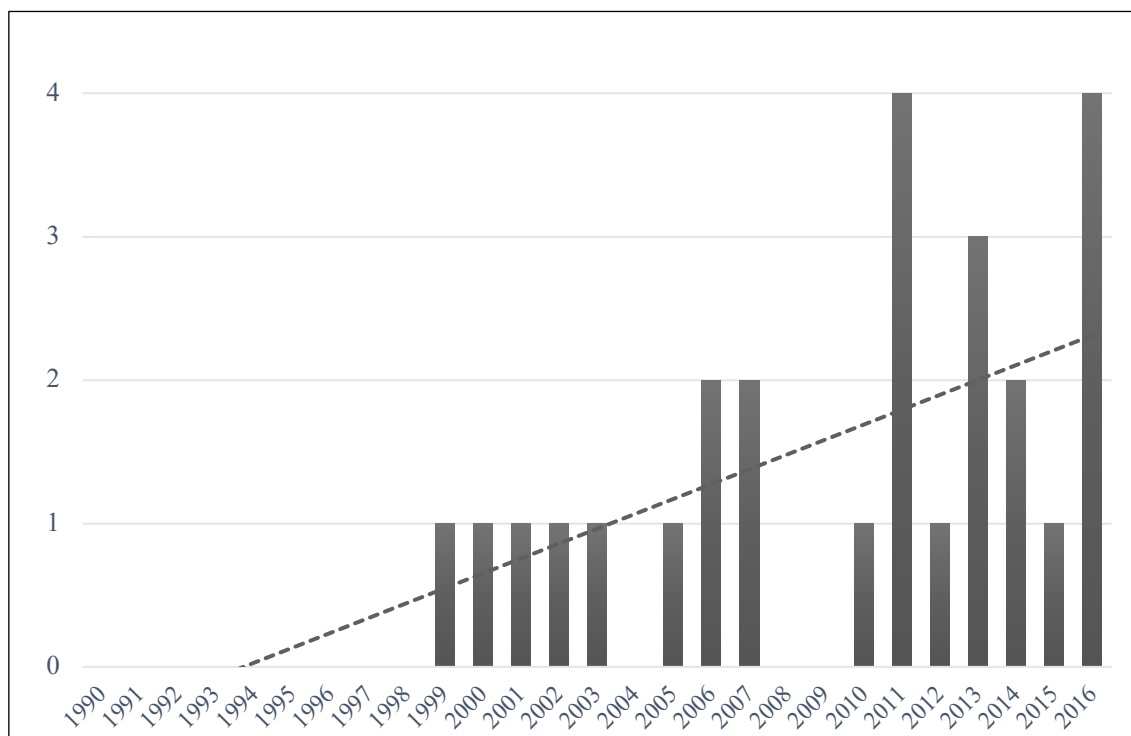
The intraregional analysis indicates some general patterns and trends for candidatures of former first ladies in Latin America. The comparison at the cross-country level had the following general results. First, in 11 of the 18 Latin American countries, former first ladies were nominated for elections: Argentina, Costa Rica, Dominican Republic, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Paraguay, Peru, and Uruguay. Second, in 8 of these 13 countries, a former first lady was elected: five countries in South America (Argentina, Paraguay, Ecuador, Peru, and Uruguay) and three countries in Central America (Costa Rica, Dominican Republic, and Nicaragua). Third, in eight countries, a former first lady was a candidate more than once: Peru (five), Argentina (four), Guatemala and Nicaragua (three), Costa Rica, Paraguay, Dominican Republic, and Uruguay (two). Figure 8 summarizes the number of former first ladies' candidatures per country.

**Figure 8. Number of former first ladies' candidatures per country**

Source: Compiled by author

The candidature of a former first lady creates opportunities for other first ladies to also continue in politics. The diffusion of political practices is an advantage for the following nominations. In this sense, the first candidate has to battle with the entire entry barrier of the designation, such as acceptance as a legitimate candidate by other politicians and the opinion of the media and citizenship. A subsequent candidature of a former first lady does not include the entire entry cost. In this sense, it is not surprising that ex-first ladies have been candidates more than once in seven countries.

The above evidence reveals that most candidatures happened after 2000. The first ladies' intention to continue in politics after the presidential mandate began in 1999 with one case and continued over time. The increase in former first lady candidatures since 2010 indicates the presence of a high regional contagion (diffusion effect).

**Figure 9. Number of candidatures of former first ladies per year**

Source: Compiled by author

In 2016, four former Latin American first ladies ran in legislative or presidential elections. In her second attempt to reach the Peruvian presidency, former first lady Keiko Fujimori (1994-2000) nearly won the presidency, only losing by 0.5% of the votes in the second round, after a right coalition was formed to support, Pedro Pablo Kuczynski, the winner. Fujimori was the only former first lady to be defeated that year. The Dominican Margarita Cedeño de Fernández (first lady in 2004-2012) and the Nicaraguan Rosario Murillo (first lady since 2007 and in 1985-1990) won the vice presidencies of their respective countries. In Nicaragua, Maria Fernanda Flores de Alemán (first lady in 1999-2002) also triumphed, winning a seat in the unicameral National Assembly. Although the number and high profile of the candidates seem striking, 2016 was not a significant year for former first ladies; it merely represents a growing trend.

Former first ladies have run for an electoral position 26 times between 1990 and 2016, and in 19 of these cases, an ex-first lady has been elected. In total, 20 former first ladies ran for election. Nine were candidates for executive positions 12 times, and 12 ran for the Congress 14 times. They succeeded in all attempts for Parliament posts, whether the Congress had a unicameral or bicameral system.

**Table 18. Number of former first ladies as a candidate and elected per position in Latin America, 1990-2016**

<b>Institutional orientation</b>	<b>Level</b>	<b>Position</b>	<b>Number of former first ladies as a candidate</b>	<b>Number of former first ladies elected</b>	<b>Number of former first ladies not elected</b>
Executive	National	President	7	2	5
		Vice-president	5	3	2
Legislative	Unicameral	Legislator	8	8	0
	Bicameral	Senator	5	5	0
		Representative	1	1	0
<b>Total</b>			<b>26</b>	<b>19</b>	<b>7</b>

Source: Compiled by author

Furthermore, 4 of the 20 ran twice (Argentina's Cristina Fernández de Kirchner and Hilda González de Duhalde, Dominican Republic's Margarita Cedeño de Fernández, and Peru's Susana Higuchi), while one ran on three occasions (Peru's Keiko Fujimori). Moreover, five first ladies had an official parallel role during their term, and all were elected. Thus, they were simultaneously the first lady and deputy (Hilda González de Duhalde in Argentina, Elsa Bohórquez in Ecuador, and Emilia Alfaro de Franco in Paraguay) or Senator (Cristina Fernández de Kirchner in Argentina and Lucia Topolansky in Uruguay).

Legal restrictions constrain the availability of offices for which a first lady can run. Usually, the restrictions only affect positions in the executive branch (president or vice president). Two situations are possible regarding legal constraints. First, the president cannot be reelected. This option could drive a first lady's candidature as a form of "continuity ticket" of the president. Second, the electoral law or the constitution prohibits the president's relatives from running as presidential candidates for the next election. In this case, a first lady would be unable to run for president, but she could still run for another position, or she could wait until the next presidential election.

Serrafero (2015, pp. 82-83) mentioned that the advantages and disadvantages of presidential reelection in Latin America have been discussed intensively (Linz, 1994; Sartori, 1995; Serrafero, 1997; Carey, 2003; Zovato, 2009; Laclau, 2010; Serrafero, 2011), but there is little discussion about the limitations for relatives. This research gap leads to several questions: If the president cannot run again because of term limits, can the first lady replace him? If a first lady runs for president immediately after the president's mandate, is she an incumbent? Does a former first lady have an advantage over other candidates when she runs immediately after her term? What are the differences between the candidature of an ex-president and an ex-first lady?

Legal restrictions simultaneously affect the candidature of a former first lady and the timing of that candidature. The impediment is only for the election immediately following the spouses' term, impeding the use of the first lady's position as a political springboard. Serrafero (2015, p. 85-87) analyzed the constitutions and electoral laws of all Latin American countries for restrictions for relatives. He classified the countries into two categories: (a) without restrictions for the president's family (Argentina, Colombia, Chile, México, Dominican Republic, and Uruguay and (b) with restrictions for the president's relatives (Brazil, Bolivia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Paraguay, Peru, and Venezuela).

The restriction can affect the spouse, relatives for consanguinity, or affinity. The countries with direct restrictions on the spouse are Brazil, Costa Rica, Ecuador, El Salvador, Honduras, Paraguay, and Peru. Table 19 presents an actualized version of the legal restrictions for office in Latin American countries.

**Table 19. Legal restrictions to first ladies' candidacies**

Country	Prohibition			Position	Legal base	Year of creation
	Without	General to relatives	Specific to spouse			
Argentina	X	-	-	-	-	-
Bolivia	-	X	-	President Vice-president	Constitution Art.89 n°2	1995
	X				Constitution	2009
Brazil	-	X	X	President Governor Mayor	Constitution Art. 14 n° 7	1988
Chile	X	-	-	-	-	-
Colombia	X	-	-	-	-	-
Costa Rica	-	X	-	President Vice-president	Constitution Art. 132 n°3	1949
Dominican Republic	X	-	-	-	-	-
Ecuador	-	X	X	President	Constitution Art 166	1998
	X				Constitution	2008
El Salvador	-	X	X	President	Constitution Art 152 n°2	1983
Guatemala	-	X	-	President Vice-president	Constitution Art 186 n°3	1985
Honduras	-	-	X	President	Constitution Art 240 n°6	1982
Mexico	X	-	-	-	-	-
Nicaragua	-	X	-	President Vice-president	Constitution Art 147 n°2.1	1987
Panama	-	X	-	President	Constitution Art 192 n°2	1972
Paraguay	-	X	X	President Vice-president	Constitution Art 235 n°9	1992
Peru	-	X	X	President Vice-president	Ley Orgánica de elecciones 26859 Art 107 n°5	1997
Uruguay	X	-	-	-	-	-
Venezuela	-	X	-	Vice-president	Constitution Art 238	1999

Source: Compiled by the author based on <https://www.constituteproject.org> (2016)

Three candidatures of former first ladies have been controversial: Raquel Blandón de Cerezo and Sandra Torres in Guatemala and Marta Linares de Martinelli in Panama. These three tried to become presidential candidates despite their countries' constitutions forbidding the president's family members to run for the presidency or vice presidency in the election that replaces the head of government.<sup>26</sup> These cases contributed to polarizing the party system and the public opinion. The attempts, nevertheless, were forbidden. The Constitutional Court of Guatemala prohibited the candidacy of Raquel Blandón de Cerezo in 1989 and Sandra Torres in 2011, and the Supreme Court of Panama banned the nomination of Marta Linares de Martinelli in 2014. However, Marta Linares ran for the vice presidency because the resolution of the Supreme Court of Panama was after the elections. In the Guatemalan cases, the two former first ladies ran for office later. Raquel Blandón de Cerezo ran for the vice presidency in 2011 and Sandra Torres for the presidency in 2015. Neither was elected.

The possible candidacy of Sandra Torres is more controversial. In 2011, the first lady of Guatemala, Sandra Torres Casanova, announced her presidential candidature, which unleashed both negative and positive reactions. A few months later she divorced President Álvaro Colom (D. Fernández, 2011; Miglierini, 2011). The opposition accused her of fraud, assuming that the only objective of the divorce was to avoid the legal restrictions a first lady would have faced when presenting herself as a presidential candidate (López, 2011; Ordaz, 2011). With the juridical precedent of 1989 (Corte Constitucional de Guatemala, 1989), the opposition presented a lawsuit at the electoral tribunal and the Supreme Court, and Sandra Torres lodged an appeal in each instance. In the end, the Constitutional Court decided (*expedient 2906-2011*) that the constitutional restrictions for relatives included the whole presidential mandate.

The marriage existed during the first three years of the presidential term when Sandra Torres Casanova acted as the first lady. Therefore, the prohibition from being a presidential candidate remained, although Sandra Torres was divorced when she

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<sup>26</sup> Paragraph c of article 186 in the Guatemalan constitution states that relatives within the fourth degree of consanguinity and the second degree of affinity to the president (or vice president when the vice president is exercising the presidency) cannot be candidates while the president is in office (Fernández, 2011, p. 3). In Panama, articles 192 and 193 of the constitution prohibit to president's relatives within the fourth degree of consanguinity and second degree of affinity to become candidates to the presidency and the vice presidency in the first election in which the president does not compete.

presented her candidature. The Court declared that the divorce was not fraud; however, Sandra Torres was not allowed to run for President in 2011 (Corte Constitucional de Guatemala, 2011). However, she was a presidential candidate of the party *Unión Nacional de la Esperanza* (UNE) in 2015. Although she led in all public polls prior to the election, she lost on the second ballot with 32.56% of the votes against Jimmy Morales, who had 67.44% of the votes or 2,750,847 votes.

The unsuccessful former first ladies all ran for top executive offices (five for president, two for vice-president). However, the percentages of votes obtained and the general results of the elections are diverse. Seven of the unelected former first ladies can be classified into two categories. The first category is nomination without electoral chances: the candidature of some first ladies was used more as a symbol than as real competition. While running for office, they knew their likelihood of succeeding was minimal. The second is nominations with high electoral chances: some first ladies lost by only a few votes. One example of a nonviable candidate without any chance of winning is the presidential candidate Patricia Escobar de Arzú in Guatemala. In 2011, the former President Álvaro Arzú (1996-2000) recognized his constitutional impediment to running for president again and presented his wife as a candidate of the Unionist Party (Cardona, 2011). She lost with 2.19% of the votes.

Xiomara Castro de Zelaya is an example of a failed presidential candidature. She was the presidential candidate of Honduras of the party *Libre* in 2013. Some media and political analysts said that Xiomara Castro only responded to a move by her husband since the only option that "Mel" Zelaya had to return to the government was through his wife (Serrafero, 2015, p. 97). She lost with 28.78% of the votes against Juan Orlando Hernández. She accused the government of electoral fraud and other irregularities, but the accusations could not be confirmed. The Electoral Observation Mission of the Organization of American States (OAS) recommended some reforms (Organization of American States, 2014) regarding the electoral organization, electoral law, credentials, and the election planning process but concluded that the election was transparent and peaceful.

## 4.6 Empirical Findings

The findings demonstrate that one condition cannot define the successful performance of a former first lady; the causal mechanism is a combination of necessary conditions. However, the combination of some conditions could explain the election of an ex-first lady. Although there are 64 possible combinations of conditions, only 12 combinations fit with the empirical cases. Table 20, below, presents the possible combination of causal conditions with observed cases where 1 is the presence of the condition and 0 the absence.

**Table 20. Empirical Findings**

A: Previous electoral political experience

B: Active role

C: Office of the first lady

D: Name of the president

OUT: Output value

n: Number of cases in configuration

incl: Sufficiency inclusion score

PRI: Proportional reduction in inconsistency

A	B	C	D	OUT	n	incl	PRI
0	1	1	0	0	5	0.800	0.800
0	1	1	1	0	6	0.333	0.333
0	1	0	0	1	1	1.000	1.000
1	1	1	1	1	1	1.000	1.000
0	1	0	1	1	2	1.000	1.000
1	1	0	1	1	2	1.000	1.000
1	1	0	0	1	3	1.000	1.000
0	0	0	0	?	0	-	-
0	0	0	1	?	0	-	-
0	0	1	0	?	0	-	-
0	0	1	1	?	0	-	-
1	0	0	0	?	0	-	-
1	0	0	1	?	0	-	-
1	0	1	0	?	0	-	-
1	0	1	1	?	0	-	-
1	1	1	0	?	0	-	-

Source: Compiled by the author using QCAGUI for R.

The findings indicate that the critical condition is an active role (B) during the first lady's term. Regarding delegate capital, the office of the first lady (C) is irrelevant to electoral success. The power of the informal institution on the first lady's performance fulfills the same (or better) purpose as an official office. The absence of the official office (C) in combination with an active role (B) helps increase her electoral success. This combination of conditions, plus the combination of previous electoral political experience, an active role as a first lady, and using the president's name, increase her electoral success. The minimization of the formula is presented in Table 21.

**Table 21. Minimization of the formula QCA**

A: Previous electoral political experience  
 B: Active role  
 C: Office of the first lady  
 D: Name of the president  
 OUT: Output value  
 n: Number of cases in configuration  
 incl: Sufficiency inclusion score  
 PRI: Proportional reduction in inconsistency

A	B	C	D	OUT	n	incl	PRI
0	1	0	0	1	1	1.000	1.000
0	1	0	1	1	2	1.000	1.000
0	1	1	0	0	5	0.800	0.800
0	1	1	1	0	6	0.333	0.333
1	1	0	0	1	3	1.000	1.000
1	1	0	1	1	2	1.000	1.000
1	1	1	1	1	1	1.000	1.000

n OUT=1/0/C

Total: 20

M1:  $B * c + A * B * D \Rightarrow$  ELECTED

		Incls	PRI	covS	covU
1	$B * c$	1.000	1.000	0.533	0.400
2	$A * B * D$	1.000	1.000	0.200	0.067
	M1	1.000	1.000	0.600	

Source: Compiled by the author using QCAGUI for R.

## Chapter 4: Political Capital of Elected Former First Ladies in Latin America, 1990-2016

If C and ? are include as results, the only relevant condition is the previous political experience (A) in combination with the absence of the office of the first lady (C). The results suggest that a former first lady with previous political experience does not need formal support within the government. She has her own experience participating in politics and accumulates political capital during the government without an official agency. The minimization formula is displayed in Table 22.

**Table 22 Minimization formula including C and ?**

A	B	C	D	OUT	n	incl	PRI
0	1	0	0	1	1	1.000	1.000
0	1	0	1	1	2	1.000	1.000
0	1	1	0	0	5	0.800	0.800
0	1	1	1	0	6	0.333	0.333
1	1	0	0	1	3	1.000	1.000
1	1	0	1	1	2	1.000	1.000
1	1	1	1	1	1	1.000	1.000

n OUT=1/0/C

Total: 20

M1: A+c => ELECTED

		incls	PRI	covS	covU
1	A	1.000	1.000	0.400	0.067
2	c	1.000	1.000	0.533	0.200
	M1	1.000	1.000	0.600	

Source: Compiled by the author using QCAGUI for R.

The test for the different conditions indicates that no single parameter explains a former first lady's political capital and electoral success. The data suggest that no one formula describes the outcome "elected." Nevertheless, some patterns are common to the candidatures.

In summary, the evidence presented for each condition suggests that a former first lady's electoral success is a complex combination of conditions. The analysis of all the conditions indicates that no single factor is sufficient to become elected. However, some

combinations of political capital conditions for former first ladies can contribute to their electoral success.

#### **4.6.1. Political Trajectory Matters**

The in-depth analysis of each condition indicates particular details of its impact on the candidature. Regarding the personal political capital, six former first ladies had previous electoral political experience in five different countries. They were elected in all cases. In this regard, the previous electoral experience played a significant role in an ex-first lady's political capital. First ladies who have experience as elected politicians have already demonstrated ambition to compete for political office. Sometimes, these cases are called presidential marriages (Arana Araya, 2016b, Serrafiero, 2015) because both members participate in politics.

In all these cases, these women's political careers began before they were first ladies, and all were elected to a position in the parliament (unicameral [legislator] or bicameral [deputy or senator]). They developed their political careers at the national level and were elected in all cases. In this regard, the previous electoral experience plays a significant role in the political capital of an ex-first lady. The former first ladies with experience as legislators understood participation in politics. These women knew the codes, language, and logic. Their previous electoral experience provided them with knowledge of political campaigns, politicians, donors, and influential people. Also, their previous experience in electoral politics and active roles as the first lady during the president's mandate provided political networks, electoral experience, and relationships with the parties and other politicians. Both conditions extend the political capital of the first lady.

Some first ladies developed political careers parallel to their husbands, occupying elected positions before and after being first ladies. Furthermore, their socialization into politics allows them to have confidence in their abilities to develop a political career, and they can enjoy the respect of voters who demand guarantees that they can perform well in elected offices. Presidents' wives with policy knowledge, therefore, understand the importance of limiting their agenda and clarifying their goals (Borrelli, 2011, p. 30). These women are, in fact, professional politicians who try to continue their political career

after occupying the post of the first lady. Table 23 presents the previous political experience of elected former first ladies.

**Table 23. Previous electoral political experience of elected former first ladies, 1990-2016**

Country	Name	Previous political experience	
		Office	Term
Argentina	Hilda “Chiche” González de Duhalde	Deputy	1997-2003
		Cristina Fernández de Kirchner	Deputy
		Senator	1995-1997
		Deputy	1997-2001
		Senator	2001-2005
		Senator	2005-2007
Ecuador	Ximena Bohórquez Romero	Legislator	2003-2006
Nicaragua	Rosario Murillo	Legislator	1984-1990
Paraguay	Emilia Alfaro de Franco	Deputy	2008-2013
Uruguay	Lucía Topolansky	Deputy	2000-2005
		Senator	2005-2010
		Senator	2010-2015

Source: Compiled by the author

Possibly the most famous case of a politically experience first lady is Cristina Fernández de Kirchner. She had vast political experience as deputy (1989-1995; 1997-2001) and senator (1995-1997; 2001-2005; 2005-2007) before becoming first lady. Furthermore, she was a senator and first lady at the same time, which increased her public visibility (La Nación, 2004). As first lady, she was involved in international politics, even visiting some States without the president (EFE, 2007). Cristina Fernández became the first female elected to the Argentinean presidency in 2007 after her husband, Néstor Kirchner (2003-2007), decided not to run for reelection. She was reelected in 2011. Jalalzai (2013, p. 97) pointed out that Fernández’s case reaffirms that family ties can coincide with independent political experience and ambition.

In the same country, another former first lady with previous political experience ran for office: Hilda González, known as “Chiche Duhalde.” She was a deputy (1997-2003) before her husband Eduardo Duhalde (2002-2003) became president of Argentina. After Duhalde’s term, she continued an upward political trajectory as deputy (2003-2005) and senator (2005-2011).

Ximena Bohórquez was elected deputy in 2002. In the same election, her husband, Lucio Gutierrez (2003-2005) was elected president of Ecuador. Ximena was deputy and first lady at the same time. She supported her husband’s agenda from Congress (Ronquillo, 2002). After her term as first lady, she was a legislator in the Constituent Assembly (2007-2008).

Rosario Murillo (first lady from 1985-1990 and 2007-2017) is a controversial politician of Nicaragua. The media recognized her influence and power within the government on domestic and international issues (Brandoli, 2016; Debusmann, 2007; Robles, 2016; Salinas, 2015; Santamaría, 2011). Some analysts said that she was not the power behind the throne but in it (Santamaría, 2011, p. 28). For Martí I Puig (2008, p. 290), president Daniel Ortega (1985-1990, 2007-2017 and reelected in 2017) designed the government in 2007 with a low profile cabinet and a prominent role for his wife. The press and some analyst informally called her the “co-president” (Brandoli, 2016; Debusmann, 2007; Santamaría, 2011). In 2016, she ran for the vice presidency, and her husband ran for the presidency. Without real opposition, both were elected (Robles, 2016).

Emilia Alfaro was a deputy (2008-2013) before her husband, Federico Franco (2012-2013), reached the Paraguayan presidency. After being first lady, she was elected senator (2013-2018).

Lucía Topolansky was elected deputy (2000-2005) and senator (2005-2010 and 2010-2015) before being the first lady of Uruguay (2010-2015). The press considered her an atypical first lady for her guerrilla past and her parallel post as a senator (Revista Semana, 2013; Topolansky, 2014). In 2014, she was re-elected as a senator. She was the second senator most voted, only surpassed by her husband, José Mujica (president 2010-2015). In 2017, the elected vice-president, Raúl Sendic, resigned over accusations he used public funds for personal use while heading a state company (BBC, 2017). According to

Uruguayan law, the Senator with the most votes is the new vice-president but cannot be a former president. For this reason, Lucía Topolansky, as second, assumed the vice presidency (El Tiempo, 2017; N. Fernández, 2017)

#### 4.6.2. Active role in politics as a first lady

All the candidates had an active role during their husbands' term in different arenas. They demonstrated a commitment to politics in different forms and intensity during this period. The active role of a first lady includes her participation in ceremonial and protocol activities, the promotion of public policies on social issues, the reception of international distinctions, and the participation and organization of international conferences. This active role produced mixed feelings amongst citizens, the media, politicians, the government, and the parties. However, the presidency used the role as a political advantage because it increases the visibility of the first lady's governmental actions.

All the candidates participated in protocol and ceremonial activities, such as traveling on international visits, hosting official dinners, receiving international visitors, accompanying the president to events, and giving interviews.

Also, some first ladies promoted public policies on social issues. The first lady could collaborate with the government agenda on particular topics, for instance, women, children, and family issues or poverty and social programs. An emblematic example is the Dominican Margarita Cedeño (2004-2012), who implemented four major public policies: (a) *progresando* (progressing), (b) *centros tecnológicos comunitarios* (communitarian technological centers), (c) *solidaridad social* (social solidarity), and (d) *leyendo aprendo* (I learn while I read). The first program was aimed at people in extreme poverty who participated in actions of human and citizen formation, professional technical training, and income generation. The second installed 87 Community Technology Centers in rural areas of the country to democratize access to knowledge and information. The third sought to inform people about preventive health measures by organizing medical conferences and solidarity support. Finally, the fourth promoted reading and cultural education. In addition, the first lady created several programs, such as *Bebé, piénsalo bien*, aimed at preventing teen pregnancy; *Hoy es el mayor momento*,

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aimed at preventing breast cancer; and *Mujeres en Red*, dedicated to training women in network technology (El Nacional 2013, El Nacional 2012, Hoy 2006).

Related to children and family issues, in Costa Rica, Gloria Bejarano created the *Centro Costarricense de Ciencia y Cultura* (Costa Rican Center of Science and Culture), known as *Museo de los Niños* (Museum for Children,) and in Peru, Susana Higuchi and Keiko Fujimori were presidents of the *Fundación por los niños del Perú* (Foundation for the Peruvian children). Also, in Nicaragua, María Dolores Alemán promoted programs for rural areas in coordination with the Ministry of Education (for instance, the construction of schools) and Institute of Women (bank credits and promotion of hydroponics gardens).

At the international level, some first ladies were awarded international distinctions for their activities during the presidential term from other countries or international organizations. For example, Spain gave the *Banda de Dama de la Real Orden de Isabel la Católica* (Queen's Band of the Royal Order of Isabel the Catholic) to Gloria Bejarano (Ecuador, 1991), Susana Higuchi (Peru, 1991), and María Julia Pou Brito del Pinto (Uruguay, 1992). The Italian government gave two distinctions to Margarita Cedeño. The Italian president Giorgio Napolitano awarded her with the *Ordine della Stella della Solidarietà Italiana grade gran official* (Order of the Star of Italian Solidarity) in 2009, and president Silvio Berlusconi awarded her with the gold medal of the Italian government in 2011. In addition, she received awards from international organizations, like the Panamerican Health Organization (OPS, 2007), United Nations Conference on Trade and Development (UNCTAD, 2011), and the Food and Agriculture of the United Nations (FAO, 2010).

Regarding regional summits, Raquel Blandón organized the first conference of The Centro American First Ladies Meeting in 1987. Xiomara Castro de Zelaya held The Meeting of First Ladies and Woman Leaders of Latin American against AIDS in Honduras in 2006. Margarita Cedeño hosted The Centro American First Ladies Summit in 2006 and The Meeting of First Ladies and Woman Leaders of Latin American against AIDS in 2008. Finally, in 2015, Rosario Murillo participated at the conference of the Community of Latin American and Caribbean States as acting Foreign Minister (Álvarez, 2015).

### **4.6.3. Name of the first lady**

The first lady also owns family political capital inherited from the president. This capital can be transferred in explicit and implicit forms. For example, some first ladies in Latin America modified their surname using the “de” (of) suffix to explicitly add the president’s name to their own. The use of an (ex-)president’s name is a direct association for the voters. In contrast, an implicit form is the use of the president’s political and party networks.

Six elected former first ladies elected used the president’s name: Cristina Fernandez de Kirchner (CFK), Hilda González de Duhalde, Margarita Cedeño de Fernández, María Fernanda Flores de Alemán, María Dolores Alemán, and Keiko Fujimori. However, the last two cases share the president’s last name because they were daughters of former presidents with the position of the first lady.

### **4.6.4. Office of the First Lady**

Regarding delegate political capital, the existence of an official office of the first lady in the country does not determine the first lady’s political participation. Sometimes, the informal institution is more relevant as the common knowledge about the position influences the first lady’s performance in each context. In 12 cases, the candidate had an office and only in seven cases did she win.

The first lady can use the informal support of her political party, the president, and the cabinet to achieve her political goals. Without a formal office within the government, she can access more resources without the control of other institutions (horizontal accountability) and legal restrictions. Therefore, the influence of the formal office of the first lady is weak. This fact confirms Bennister et al.’s (2015, p. 418) argument that the informal authority one is granted, rather than the formal position, is what truly matters.

## 4.7 Conclusion

This analysis provides evidence that former first ladies are becoming more common in Latin American elections. This seems to be a growing trend: between 2010 and 2016, there were 16 candidates, six more than in the entire period 1990-2010. The rising number of ex-first ladies winning elections indicates a diffusion effect in the region. This trend introduces a new actor to the political arena, one who has previously been widely ignored by the literature. The first lady is exposed to the public, but her position is not a magic springboard to the political arena. The role provides political resources, networks, expertise, visibility, and influence. However, the position itself is not a guarantee to continue in politics; her success is a combination of conditions.

A former first lady's political capital has two components: personal and delegate. Her personal political capital is her previous political experience and active role as a first lady during her term. The delegate is the existence of a formal office of the first lady and the use of the president's name. The combination of these conditions can increase the probability of a first lady becoming a candidate and winning an election.

The QCA analysis found strong support for the theory of personal political capital with the condition of previous political experience. While conventional descriptions tend to depict them as political delegates, electorally experienced first ladies who run for office should be regarded as strategic politicians that take advantage of their ceremonial role to become competitive candidates after stepping down from the executive office. The results also suggest that first ladies who engage in public policies are more likely to run for office, but only in combination with the use of the president's name and previous political experience.

However, I did not find support for the expectation that first ladies will become candidates and win when they have an office within the government. The institutionalization of the office does not play an essential role in increasing the former first lady's political capital. She can also use informal technical, political, and economic support from her political party, the president, politicians, and private persons.

The electoral irruption of former first ladies may have significant consequences on the democracies of the region because former first ladies' candidature can increase the degree of personalization of political competition, where ideas and programs are

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subjugated to the personal political capital of outstanding figures. Likewise, this development can further limit modest circulation of a region's political elites because former first ladies can block the emergence of new actors not associated with political families. By winning a popular election, former first ladies extend the power of families with strong positions, a common phenomenon in several Latin American countries.

Twenty former first ladies decided to continue in politics as candidates for political offices after their terms as first ladies. The reasons for their pursuit of political careers may vary from case to case. Some may have wanted to capitalize on their demonstrated leadership skills, while others may have wanted to extend their husbands' legacies. Still others may have already been involved in politics and just continued their careers. Five former first ladies were candidates more than once, which suggests they were interested in remaining in positions of popular election and not only using their popularity to "try their luck" in elections. Therefore, their repeated candidacies imply recognition of their leadership by parties as prominent political figures.

Former first ladies have been candidates in South American and Central American countries with a different gross domestic products (GDP), sizes, and populations. Therefore, these candidates are not limited to certain countries, so we can expect candidatures of former first ladies in other countries of the region.

Previous experience in electoral politics and an active role as first lady during the president's mandate provide political networks, electoral experience, and relationships with the parties and other politicians. These conditions extend the first lady's political capital.

The results and trends of the empirical analysis of the Latin American context suggest common patterns in former first ladies' political careers. An intraregional comparison is a pertinent approach to discover trends in the Latin American region but insufficient for generating a general theory. Studies of the situation in other regions are needed.

The irruption of first ladies as competitive politicians introduces a conceptual challenge to the growing literature on women and politics. The results presented are a step forward in understanding the significance of the first lady's political career, political capital, role, and status in domestic politics and identify some common patterns in former

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first ladies' electoral performance. The findings presented in this study have consequences not only for the analysis of former first lady's electoral performance but also for the use and regulations of the role during the presidency and further candidatures, such as legal restrictions to relatives and the creations of family dynasties.

However, more studies are needed. Some open questions for future research are: How are domestic politics affected by the election of a former first lady? What is the role of the ex-president in the nomination of a first lady? What external factors influence the election of a former first lady? Does the election of a former first lady help generate political dynasties? Another aspect of interest the study of elected former first ladies' performance in their new positions. Which topics does she work on? Does she continue in politics after her first mandate as an elected politician? However, at this stage, the absence of comparative data discourages the study of first ladies and prevents quantitative analysis of the phenomenon.

Finally, the study of the position of the first lady should be incorporated into the emergent studies of the executive elite. The strong presidential powers in the executive branch in Latin America are controversial. In this sense, the candidature of a former first lady can be a further step in the concentration of power and generation of dynasties.

## **Chapter 5: Conclusion**

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## 5.1 Summary of Empirical Findings

This last chapter summarizes the general insights of the dissertation, the implications of the empirical findings, the contributions to the theoretical debate, and future avenues of research on first ladies. While each paper contains a more nuanced presentation of the specific results, this section presented the findings of this comparative analysis.

The literature evidenced that the role of the first lady has become more political adding new responsibilities and tasks (M. Borrelli, 2011; Burns, 2004; Watson, 1997; Winfield, 1997a). These women are actively participating in political campaigns, leading public policies, and assuming decision-making responsibilities in the government. The increasing importance of their role has allowed them to acquire political capital, and even to enter the political arena. The study of the first lady is relatively new (Watson, 2003). First ladies have been an object of analysis in recent studies of the American presidential mandate. Although scholars of U.S first ladies have demonstrated the relevance of the position in domestic and international politics, they have failed to analyze the phenomenon in other countries. This dissertation closed this research gap by analyzing the first ladies as political actors in Latin America.

This study examined under what conditions first ladies participate in Latin American politics. This cumulative thesis linked the existing theories with the intraregional praxis. While existing studies only analyze the U.S. reality, I proposed a comparative perspective to highlight the shared paths and differences in the region at first ladies' institutional and political career levels. The analysis of first ladies' participation in Latin American politics from a comparative perspective is a novel contribution to the existing literature.

While conventional descriptions tend to depict first ladies as ceremonial and protocol actors, I propose that first ladies are political actors at the executive level with a particular office within the institutional presidency, and some are strategic politicians that take advantage of the role to become competitive candidates after stepping down from the executive office. These women should be considered a new and unique member of the political elite. First ladies are political actors who influence presidential behavior and

executive politics and who are increasingly running for office. Also, they are highly connected to the most powerful politician in the country. While their emergence increases the participation of women in positions of power, first ladies' also contribute to extending dynastic relations in the region's political elites.

The main roles of first ladies (escort, protocol, *noblesse oblige*, and policy [Winfield, 1997]) are complementary. Some first ladies are discrete, only emphasizing one or two roles during the presidential term of their husbands or fathers. Usually, they combine the escort and protocol roles. However, first ladies more commonly support the president's agenda, participating actively in politics and combining all roles.

First ladies' political participation has different expressions within the presidency. For instance, these women actively participate in political campaigns, lead public policies, and assume decision-making responsibilities in the government. The political activity of first ladies has dramatically grown in the last two decades. Thus, the first lady needs political and technical support. The main goal of office of the first lady within the institutional presidency is to promote, collaborate with, and organize her official activities. This institutional support allows first ladies to participate actively in politics by providing economic resources and political knowledge.

In a presidential system, the first lady's function within the government is imprecise and vague. Although they can have an official office within the institutional presidency, first ladies are unelected and unaccountable actors who nevertheless influence presidential behavior and executive politics. Usually, the first ladies' working area is not regulated, which implies that the role of the first lady is not officially explained or formalized.

The increasing importance of their role has allowed first ladies to acquire political capital and even to enter the political arena. Furthermore, some first ladies continue in politics after leaving the government. The political post-career of former first ladies is a new research issue. Between 1999 and 2016, 20 former first ladies ran for the presidency, vice presidency, or Congress in Latin America. Despite the growing importance of this unique type of candidate, political analysts routinely describe them as mere delegates of the president. The analysis indicated that this conventional view had overlooked the political trajectory and strategic behavior of some former first ladies who have run for

office, limiting our understanding of the implications that these candidacies have on female representation and patterns of competition in the political elite.

Guerrero Valencia and Arana Araya (2018) classified former first ladies into two main groups who participate in electoral contests after leaving the executive branch. In the first group are the "heirs." In line with the conventional vision, these former first ladies had no political experience before reaching the executive level and run to capitalize and extend the president's legacy. This category contains 12 of the 20 first ladies who ran for election between 1990 and 2016. The second group, the "politics," are the first ladies who held positions of popular election before reaching the executive level, and the post of first lady only represents a position that favors the women's political careers. In this group, there are eight cases of former first ladies in the period studied. In summary, although the candidates in both categories enter the political arena after becoming first ladies and strategically use the position to enter or continue a political career once they leave office, some do so as untrained delegates of their husbands or presiding parents, while others are independently following their established electoral trajectory.

The contribution of this dissertation is not limited only to this topic, the multi-method methodology combining quantitative and qualitative analysis is also innovative. The papers combined several kinds of literature developing new theoretical approximations and applied different methods of analysis with the common objective of explaining the political performance of first ladies. Each manuscript responded to a different aspect of the research using a specific methodology. While Chapter 2 focused on the institutional aspect of the topic, analyzing the institutionalization of the office of the first lady within the government in the 18 Latin American countries. Chapter 3 concentrated on explaining when former first ladies run for office, measuring contextual, institutional, and personal variables in a quantitative large-N analysis (88 first ladies in 133 elections). Chapter 4 deeply examined the political capital of 20 former lady candidates in the comparative qualitative analysis.

The empirical analysis demonstrated the political participation of Latin American first ladies from two perspectives. The first approach was the institutional framework of the first lady's role within the government. The office of the first lady as an official agency within the institutional presidency, which directly supports her performance with its staff, budget, organizational subunits, and tasks, have significantly different structures, levels

of formality, and degrees of institutionalization among countries. The office offers political, economic, and administrative support to an active first lady in politics.

The second perspective presented the personal and structural conditions of former first ladies who run in elections in a large-N (88 first ladies in 133 elections in 18 countries) and in a small-N (20 first ladies who ran 26 times). The first study comparatively analyzed the political careers of all former first ladies in Latin American countries between 1990 and 2016, identifying when former first ladies run for office. The second analysis focused only in the former first ladies who ran for office and were also considered politicians; some were professional politicians and others were newcomers.

The study of former first ladies' political careers is a novel contribution to the existing literature. The increasing participation of former first ladies in Latin American elections in the last decade stimulates the study of their political careers. To understand when they run and under what condition they are elected, a comparative and comprehensive analysis of this new type of politicians was provided. As Borchert (2011, p. 136) mentioned, studying political careers provides a particularly fruitful approach to understanding institutional stability and change. At the same time, this understanding reminds us that the political actor's world is not defined primarily by any one institution.

Regarding the institutional approach, the government's support of the first lady is evidenced by the data in Chapter 2. The support can be formal or informal, but in general, is a mix of both. The office of the first lady is broadly under the umbrella of the institutional presidency. In nine countries, the office of the first lady was a stable agency within the institutional presidency. For the sub-regions Central and South America, the institutionalization of the office of the first lady trended higher in Central American countries than in South American countries.

The comparative research identified that the institutionalization and formality of the office of the first lady presents general regional paths. The first wave of creation was at the beginning of the 1990s with the return of democracy, and the second was at the beginning of the 21st century when new democracies were more consolidated. The first wave of creation of offices of the first ladies began with Guatemala (1991), Colombia (1991), and Bolivia (1998). The second wave of creation or substantial modification of the offices started with Dominican Republic (2000), then continued with Peru (2002),

Paraguay (2003), Bolivia (2004), Costa Rica (2005), Chile (2009), Guatemala (2005, 2008, 2014) and Panama (2010). The two waves confirm the diffusion effect in the region.

The president has incentives to create, redesign, and modify the office to support the first lady's behavior and her choices, but not to regulate the first lady's position. The design and institutionalization of the office of the first lady occurs as presidential calculus and involves the management of resources, responsibilities, issues, and relationships with other government institutions and Congress. In some cases, the office of the first lady might be a fundamental institution within the institutional presidency to support the presidential agenda

The personal approach (Chapter 3) indicated that first ladies are more likely to become candidates when they have experience as elected politicians and when they are electorally competitive. Electorally experienced first ladies who run for office should be regarded as strategic politicians that take advantage of the ceremonial role to become competitive candidates after stepping down from the executive office.

Building on this literature, politically ambitious first ladies could be more willing to seek a formal political position and may be more inclined to gain political experience while they are in the executive branch. According to Winfield (1997, 167), some American first ladies have helped formulate, develop, and influence public policies. A first lady's political influence can be observed in her public activities, speeches, and topics in the executive agenda. However, she also has implicit influence on the president's decisions, other politicians, official political parties, and the media. Both types of influence give her invaluable experience in politics and access to power resources.

The first lady's previous political experience is the explanatory factor for post-candidacies. Political experience matters beyond other personal attributes of former first ladies. While conventional descriptions tend to depict them as political delegates, the analysis indicated that electorally experienced first ladies who run for office should be regarded as strategic politicians that take advantage of the ceremonial role to become competitive candidates after stepping down from the executive office. We found strong support for our theory: a 73% chance that a first lady with experience as an elected politician will run for the presidency, vice presidency, or Congress; the likelihood is less than 1% otherwise. Although we did not find support for the hypothesis that first ladies

will become candidates in the first election after leaving office, we did find that those with electoral experience take advantage of their first chance to compete in elections. Our results also suggest that first ladies who engage in public policies are more likely to run for office but at a much lower rate than previously elected first ladies.

While factors commonly associated with the participation of women in politics and newcomers were also statistically unrelated to the candidatures of former first ladies, the electoral surge of former first ladies can be interpreted as part of a broader increase in women elected to political offices in Latin America in the last decades. In 1990, Violeta Chamorro (1990-1997) became the first woman president in the region, and since then, five more have been elected. In 1991, Argentina approved the first gender quota law (*Ley de Cupos*) in the world, and now all countries except Guatemala and Venezuela have adopted these quotas. As a result, the percentage of women legislators has grown steadily. Relatedly, since the mid-1990s, the representation of women in cabinets increased dramatically (Escobar-Lemmon & Taylor-Robinson, 2005).

In the same line, Chapter 4 provided evidence for the significant role of previous political experience in the former first ladies' political capital. Regarding personal political capital, six former first ladies had previous electoral political experience and were elected in all cases. First ladies who have experience as elected politicians have already proven their ambition to compete for political office. Their socialization into politics allows them to have confidence in their abilities to develop a political career, and they can enjoy the respect of voters who demand guarantees that they can perform well in elected offices. Presidents' wives with policy knowledge have, therefore, understood the importance of limiting their agenda and clarifying their goals (Borrelli, 2011, p. 30). These women are, in fact, professional politicians who try to continue an ascendant career after occupying the ceremonial post of the first lady.

In addition, the analysis of first ladies' political capital suggested that the office of the first lady plays an essential role in supporting the first lady's political participation in the government. However, the institutionalization of the office does not play a crucial role because the key condition is the access to power and economic and political resources.

Following Chapters 3's and 4's analyses, my argument cautiously predicts that future former first ladies will participate in politics more than this generation of former first ladies. Former first ladies will continue to accrue more political capital and run for office.

In addition to these contributions, this dissertation offers the most systematic, empirical study of the political participation of Latin American first ladies to date. I tested my arguments with (a) an original database of offices of the first ladies to capture its institutionalization; (b) original cross-national, time-series data on all Latin American first ladies previous and subsequent political experience and context variables; and (c) an original database of former first lady candidates and their political capital.

In summary, answering the central question that guided this dissertation is complex. The conditions in which first ladies participate in Latin American politics are numerous. At the institutional level, the office of the first lady within the institutional presidency offers the first lady an excellent opportunity to be involved in the government. At the personal level, previous political experience is the critical condition for accumulating political capital and running for office. A first lady's political career is an indicator of her political ambition. The analysis found that a first lady might be analyzed as a member of the elite like other politicians. This thesis contributes to the understanding of first ladies' political participation not only when they are in the first lady position but also in their possible future political careers.

Finally, this dissertation's findings present some limitations regarding its scope. First, the active participation of first ladies in politics only has great incentives in presidential systems. The predominant role of the president in presidential government facilitate the first lady's access to power resources. The first lady is a complementary part of the presidential prominence. In this sense, the first lady's activism is constrained by the regime type: presidentialism. That explains why the figure of the first lady is crucial in the United States and Latin American countries and not in Europe. Nevertheless, the first lady of a semi-presidential system can also play an active role, such as in France.

Second, the first lady has privileged access to the president's political network. However, the same may be true for other politicians with family ties. Latin America has a long tradition of political families that concentrate many positions of power (Alcántara

2012; Arana 2016b). For example, some presidencies have been occupied by parents and children, as illustrated by the Frei in Chile, the Pastrana in Colombia, the Arosemena in Ecuador, the Batlle in Uruguay, and the Somoza in Nicaragua. The first lady is a socially accepted role in the government, which allows these women to be directly involved in politics parallel with the president and use the governmental resources. Also, the first lady is frequently recognized as a complement to the presidency. This position in the government makes the first lady a unique type of member of the family because she is the only one who can use this privileged position. She is not accountable to other institutions and can only be fired by the president. Other family members can have a position in the government, but usually, they will be accountable.

Third, legal restrictions can constrain the offices for which a first lady can run. Usually, the restrictions only affect positions in the executive branch (president or vice president). First ladies could still run for Congress when these restrictions were in place. However, the legal restriction for former presidents can stimulate the candidacy of a former first lady as a proxy of her husband.

## **5.2 Implications for the Theoretical Debate**

A fundamental finding of this dissertation is that the role of the first lady in politics might be more important than the majority of studies assume. First, there is an ambiguous institutional definition of the first lady's tasks, responsibilities, and resources within the presidency. Second, first ladies' participation in elections after their terms as first ladies demonstrate the prominent figure they play in Latin American politics. Also, this study found that the first lady can be not only the wife of the president but also a daughter, sister, son, husband, or other person, according to Latin American reality. However, in most cases, the first lady remains the wife of the president.

The present research has demonstrated that the figure of the first lady is unexplored and an underestimate political actor in Latin American research. The dominant literature on first ladies has principally been produced in the U.S. and has analyzed single cases of this country with a qualitative approach. I argued that the political participation of first ladies is not specific to the USA, but rather characteristic of the presidential system more generally, despite heterogeneity in socio-economic and political

contexts. This dissertation provides the necessary corrective by examining Latin American presidential democracies.

This investigation presented in-depth area expertise on Latin America politics using a comparative method (Comparative Area Studies). The dissertation considered first ladies from 18 countries between 1990 and 2016. This intraregional comparative study provides more generalized findings and middle range theories through the combination of quantitative and qualitative methods. As Lieberman (2005, p. 440) proposed, the goal of a nested analysis is ultimately to make inferences about the unit of analysis shared between the two types of analyses.

This research demonstrated that first ladies' participation in politics is a growing phenomenon with institutional and personal explanatory factors in Latin America in accordance with the specialized literature about the first ladies in the US (Anthony, 1990; M. Borrelli, 2011; Burns, 2004; Stooksbury & Edgemon, 2003; Watson, 1997, 2000a; Winfield, 2007). The findings of this dissertation provide a more comprehensive comparative analysis, combining qualitative and quantitative methods, than those of the recent studies.

Another aspect is the contribution of this research in the field of presidential and elite studies. While conventional descriptions tend to depict the first lady as a political delegate of her husbands or as a simple protocol position, I propose that first ladies should be regarded as politicians who participate in politics within the institutional presidency, and some continue after their husbands' governance. As a consequence, the first lady is a political actor who might be included in elite and presidential studies.

First ladies can participate actively in politics during their husbands' governance. The first lady can also be involved in politics before and after the election of her husband. This dissertation proposed a comprehensive analysis of first ladies' political careers, considering their previous political experience and post-first-lady political activities. This study shed light on an underexplored new trend: former first ladies running for office. Although U.S. former first lady Hillary Clinton's run for the presidency has been frequently studied, the 20 former first ladies who became candidates 26 times in Latin American countries has rarely been the focused of political science research.

The irruption of first ladies as competitive politicians introduces a conceptual challenge to the growing literature on women and politics. Higher rates of women participating in politics constitute an improvement in women's representation and democratic legitimacy (Ballington & Karam, 2015). Former first ladies who become elected politicians can help balance the gender disparity in politics; promote the entrance of more females into the electoral arena; and like other women in positions of power, endorse public policies that help to close gender disparities in society (Ballington & Karam, 2015; Inter-Parliamentary Union, 2014).

However, politicized former first ladies can also be related to problems in democratic governance. They can contribute to a personalization of politics, in which the candidates' names and images become more important than the ideas and projects they represent. Furthermore, they may contribute to limiting the circulation of members in the political elite. In Latin America, there is already a large number of former presidents running for the presidency and "political dynasties" in which some powerful families control several political positions.

If more former first ladies enter the electoral arena, it may become increasingly difficult for new politicians, including women from less influential backgrounds, to make it to the highest offices. Adding former first ladies to the list of members of political families that rotate in positions of power may make those families more influential and restrict the competitiveness of regional democracies (Dal Bó, Dal Bó, and Snyder 2009; Geys and Smith 2017). Furthermore, if some former first ladies serve as ex-presidents' political delegates, they contribute to bypassing the rules of political competition to extend the power of an influential politician. This, in turn, may further personalize politics in countries that suffer from institutional weakness and fragile party systems (McAllister, 2007).

The term "first lady" presents a strategic triad between leadership, legitimacy, and political power, which can be observed both in the first lady's visible actions and in those where the influence is exerted behind the scenes. Therefore, an identifiable series of actions allow us to understand the implications of the first ladies' influence as policymakers. Hence, it is appropriate to ask who regulates the first ladies' actions, which public policies fall within her competencies, and which institutions support her work. All

answers may be related to the quality of democracy, legitimacy, and efficiency of political systems.

To summarize, my dissertation has created valuable new insights for further specification in the theoretical debate about first ladies. First, the findings demonstrate the high complexity of the first lady's role and her participation in politics. Second, institutional support for her activities is, in some cases, a formal institution within the institutional presidency but still ambiguous and not wholly institutionalized. Third, a first lady's previous political experience has a high impact on her political career during and after the presidential term. The study of a first lady's political career should be considered the time before and after having the first lady position. Fourth, the research principally emphasizes that political capital has personal and delegate conditions acquired not only during her time in office but also during her previous political experience.

This study also has policy implications regarding accountability, elections, and executive politics. First ladies are unelected and unaccountable actors who nevertheless influence presidential behavior and governmental decisions. Politicians should carefully consider the specificities of those patterns when developing regulation, restrictions, and accountability strategies for the role. The influence of unelected first ladies as policymakers or influencers also has interesting implications for democracy (O'Connor, Nye, & Van Assendelft, 1996, p. 848). Politicians should consider these potential implications.

The non-institutionalization of the office of the first lady might lead to problems in the government, such as coordination, efficiency, and transparency. The non-existent portfolio can generate problems of coordination because many governmental agencies take care of the same topic at the same time. Also, regarding efficiency problems, this non-institutionalization can produce the misuse of public resources and can duplicate efforts to solve the same problem. Similarly, the use of the public budget and resources should be regulated, especially private donations that the first lady can use for electoral goals. The use of unregulated resources can promote corruption within the government and affect its transparency.

The analysis of the Latin American empirical evidence presented new patterns of political participation of (former) first ladies. The increasing importance of their role has

allowed them to acquire political capital and even to enter the political arena. Across Latin American countries, some first ladies only participate in politics during their husbands' presidential terms, while others remain in politics and run for office in elections. Former first ladies became presidents (two), vice presidents (three), and legislators (14). This unique type of candidate could potentially affect the patterns of competition and circulation in the political elite. As discussed, in several countries in the region, some families had considerable political power. If the first ladies and their growing participation in politics help to extend the power of influential families, then access to positions of power by people from less influential backgrounds could be increasingly restricted.

First ladies, as part of the government, can affect the presidential performance. Their ability and willingness to influence and participate in politics may change over time and policy fields; this variance should not be underestimated. Policymakers should realize that the first lady's growing political participation may affect governmental rules and expand their influence area. The excessive participation of first ladies in politics can generate coordination and efficiency problems within the government.

Finally, following Chapter 3 and 4's analyses, my argument predicts that future former first ladies will continue in politics and more will run for office than this generation of former first ladies. Since more women are becoming politicians, the chances that future first ladies will have political experience are higher. First ladies will continue to accrue more political capital resources. Furthermore, given their extremely high rate of electoral success, in forthcoming years, the number of former first ladies running for office may grow even faster than women from other backgrounds.

### 5.3 New Research Avenues

This dissertation opens avenues for further research. Each paper presents a highly useful point of departure for future studies on first ladies. While a complete analysis of every perspective of the topic is beyond the scope of this thesis, my research findings, nevertheless, should inspire new studies and policy recommendations about the first lady's political participation.

A possible next step toward generalization is the test of the explanatory models in other regions or countries. First ladies around the world have increased their participation in politics within the government and after their terms. Observations from additional cases in other socio-cultural contexts might qualify some of the findings derived from the analysis of Latin American first ladies.

Furthermore, former first lady candidacies are starting to take place in other global regions. Shortly after the first Latin American former first lady ran for Congress (the Uruguayan María Julia Pou in 1999), Hillary Clinton became the first former American first lady who ran for the Senate (in 2001) and for the presidency (in 2016). In Africa, Janet Museveni of Uganda was the first former first lady to run for a seat in parliament in 2006 (Kalyango & Winfield, 2009), Nana Konadu Agyeman-Rawlings was the first woman ever to run for Ghana's top office in 2016, and Dlamini-Zuma ran for the South African presidency in 2017.

Recent studies focused on the role of African first ladies (Van Wyk, 2017) indicated that they are more political. Southern African first ladies wield considerable influence, and the office of the first lady is one of the vehicles available to perform her role. The office of the first lady is a relatively recent institution in African politics, providing administrative support for the first lady to support her husband's political agenda (Van Wyk, 2017, p. 161).

Moreover, the results of this dissertation can be used as a theoretical framework and groundwork to develop more specific case studies to understand the causal mechanism of the active political participation of former first ladies in specific cases and particular countries.

The first lady's job description remains unclear. First ladies are neither fully vertically nor horizontally accountable for their actions, which is a result of the imprecision and vagueness of their functions within the government. The regulation is a lacuna in each country.

Further research on the office of the first lady remains necessary, particularly regarding the conditions under which the office and its role within the institutional presidency has been changed. Future work needs to explore the effects and consequences of the institutionalizations and changes of the office in regard to political accountability and the first lady's behavior. Additionally, research on informal support for the first lady is needed.

Another interesting research topic is the first lady's influence in the government. Future studies need to measure her influence in the presidential agenda and the president's popularity. The first lady could collaborate with the government agenda on some particular topics, such as women, children, and family issues, poverty, and social programs. However, the real influence of the first lady on presidential decisions remains unclear. Also, since the first lady's performance is directly related to the president, her actions might affect his popularity and relationship with the citizens, Congress, political parties, and the press.

The first lady's political performance increases the visibility and participation of women in politics and diversifies the ways females enter the electoral arena. However, a first lady might not necessarily have a gender agenda. Do elected former first ladies advance substantive representation of women issues, such as promoting gender equality policies? She could promote gender equality policies during her time in office and after if she became elected. More studies on substantive representation is needed.

Finally, qualitative researchers can discover how political couples who reach the presidency work to advance their political careers as a team. For instance, it would be of interest to determine the role that male presidents play in the campaigns of former first ladies, as well as their subsequent performance if ex-first ladies succeed. These topics seem increasingly relevant because former first ladies have proven to be highly competitive candidates and seemed to have permanently entered the electoral arena.

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# Appendices

## I. Summary

First ladies play an important role in domestic and international politics in Latin America. Throughout the years, first ladies have obtained new tasks beyond the traditional activities linked only to the protocol and acquired greater influence as policy makers. In this respect, they have shaped their own cabinets, have websites associated with the presidency, participate in presidential summits, play a role with regard to agenda setting and design, and implement programs and policies. First ladies are increasingly acquiring political capital, influencing governments, and becoming candidates. Twenty former first ladies ran for the presidency, vice presidency, or Congress in Latin America between 1999 and 2016. However, despite the increasing importance of first ladies in Latin American politics, no preceding work has tried to answer under what conditions first ladies participate in politics.

The dissertation examined three distinct topics focusing on the political participation of the first ladies at the cross-country level in Latin America from 1990 to 2016. This research analyzed three essays on the following topics: the office of the first lady in Latin America, the career paths of former first ladies in Latin America, and the political capital of former first ladies. The first chapter presents the scholarly literature about first ladies, general research designs and central concepts and definitions. The second chapter, “The Office of the First Lady: Evidence from Latin America, 1990-2014” focused on the institutionalization of the office of the first lady from an intra-regional perspective. These offices of the first ladies vary in scope and nature between different countries. The essay investigated the structure of the institution in 18 Latin America countries within the institutional presidency and its level of institutionalization across the dimensions of autonomy, adaptability, complexity, and coherence. On this basis, the chapter presented an index of institutionalization of the office of the first lady in Latin America from 1990 to 2014.

The third chapter, “When Do Former First Ladies Run for Office? Lessons from Latin America” argued that former first ladies run for office when they have experience as elected politicians and when they have an opportunity to become competitive candidates. The paper analyzed the 88 former first ladies who were available to become

candidates in 133 elections in 18 Latin American countries from 1990 to 2016 using discrete-time duration models. The findings demonstrate that women who held elected positions before becoming first ladies are more likely to run for office after they leave the executive branch and that they time their careers strategically, competing in the first election after serving as first ladies.

The fourth chapter, “Political Capital of Elected Former First Ladies in Latin America, 1990-2016,” focused on the conditions that impact the political capital of elected former first ladies. Several ex-first ladies chose to either initiate or continue a political career at the end of their husbands’ presidential terms. In fact, in Latin America, between 1990 and 2016, 20 ex-first ladies ran as candidates in elections 26 times either for the presidency, vice-presidency or as a member of parliament and were elected in 19 cases. The empirical evidence revealed that all ex-first ladies nominated for the Congress were elected. The findings suggest that a combination of conditions concerning their political capital had an impact on their success.

There are significant theoretical and empirical reasons to study first ladies in Latin America with an area comparative study approach. The topic can be connected to many current debates in political sciences, such as to political elites, political capital, political careers, newcomers, presidential reelection, informal institutions, accountability, party crises, and personalization of politics. Also, the relevance of the study is based on the role that several first ladies played during the government and kept playing in politics afterward. However, most studies only consider the U.S. reality. Therefore, Latin American first ladies have rarely been the focus of empirical and comparative studies. The absence of studies analyzing the electoral participation of former first ladies is surprising, given the prominent role of first ladies in Latin American politics.

This research aims at closing this knowledge gap with an empirical and theory building approach. This study creates avenues for further research and provides a new framework based on comparative, context-sensitive empirical evidence. The dissertation also has broader implications for first ladies’ political participation, which has been observed in the US and in African countries. This comparative empirical study is the first step into a rather new field of research and provides a starting point for a more comprehensive analysis of first ladies as part of the executive and political elite in Latin America.

## II. Deutsche Zusammenfassung

First Ladies spielen sowohl in der nationalen als auch internationalen Politik eine wichtige Rolle in Lateinamerika. Im Laufe der Zeit haben First Ladies neue Aufgaben übernommen, die über die traditionelle protokollarische Funktion hinausgehen. Als politisch Verantwortliche haben sie ihre eigenen Kabinette gestaltet, haben mit der Präsidentschaft verbundene Websites, nehmen an Gipfeltreffen von Präsidenten teil, nehmen Einfluss auf die politische Agenda und implementieren eigene politische Programme. First Ladies bauen vermehrt politisches Kapital auf, beeinflussen Regierungen und kandidieren selbst für politische Ämter. Im Zeitraum von 1999 bis 2016 haben 20 ehemalige First Ladies für das Amt des Präsidenten, des Vize-Präsidenten oder für einen Sitz im Parlament kandidiert. Trotz der zunehmenden Wichtigkeit der First Ladies in Lateinamerika, wurde bisher nicht geklärt, unter welchen Bedingungen First Ladies politisch aktiv werden.

Die Dissertation hat drei verschiedene Themen hinsichtlich der politischen Teilnahme der First Ladies länderübergreifend für Lateinamerika zwischen 1990 und 2016 untersucht, nämlich das Amt, die Karrierepfade und das politische Kapital der First Ladies in Lateinamerika. Das erste Kapitel stellt den aktuellen Forschungsstand zu First Ladies dar und präsentiert das Forschungsdesign sowie zugrundeliegende Konzepte und Definitionen. Das zweite Kapitel, „The Office of the First Lady: Evidence from Latin America, 1990-2014“, handelt von der institutionellen Seite der Funktion und fokussiert sich auf die Institutionalisierung des Amtes von einer intra-regionalen Perspektive. Die Ämter der First Ladies unterscheiden sich in Form und Inhalt zwischen den verschiedenen Ländern. Auf Basis eines Vergleiches von 18 lateinamerikanischen Ländern wurde das formale Amt der First Lady im Kontext der jeweiligen präsidentialen Systeme hinsichtlich Autonomie, Anpassungsfähigkeit, Komplexität und Kohärenz bewertet. Als Ergebnis wurde ein Institutionalisierungsindex des Amtes der First Lady in Lateinamerika zwischen 1990 und 2014 erstellt.

Das dritte Kapitel, „When do Former First Ladies Run for Office? Lessons from Latin America“, stipuliert, dass ehemalige First Ladies für politische Ämter kandidieren, wenn sie über Erfahrung als gewählte Politiker verfügen und wenn sie die Möglichkeit

haben, wettbewerbsfähige Kandidaten zu werden. Es wurden 88 ehemalige First Ladies im Rahmen von 133 Wahlen in 18 lateinamerikanischen Ländern zwischen 1990 und 2016 mittels eines zeitdiskreten Durationsmodell analysiert. Die Ergebnisse zeigen, dass die Wahrscheinlichkeit bei Frauen, die bereits vor ihrer Zeit als First Ladies Ämter als gewählte Politikerinnen innehatten, höher ist, dass diese auch nach der Zeit als First Lady kandidieren. Sie planen ihre Karrieren strategisch und treten direkt nach Beendigung ihrer Zeit als First Lady in der nächstmöglichen Wahl an.

Das vierte Kapitel, „Political Capital of Elected Former First Ladies in Latin America, 1990-2016“, konzentriert sich auf die Bedingungen, die das politische Kapital von gewählten ehemaligen First Ladies beeinflussen. Einige First Ladies haben sich entschieden, nach der Amtszeit ihrer Ehemänner als Präsidenten eigene politische Karrieren entweder fortzusetzen oder neu zu beginnen. Zwischen 1990 und 2016 haben in Lateinamerika 20 ehemalige First Ladies in 26 Fällen entweder als Präsidentin, Vizepräsidentin oder für das Parlament kandidiert und waren in 19 Fällen erfolgreich. Alle Kandidaturen für einen Sitz im Parlament waren dabei erfolgreich. Die Ergebnisse weisen darauf hin, dass eine Kombination verschiedener Bedingungen hinsichtlich ihres politischen Kapitals einen Einfluss auf diesen Erfolg hatte.

Es bestehen bedeutende theoretische und empirische Gründe für das Studium der First Ladies in Lateinamerika mittels eines regionenvergleichenden Untersuchungsansatz. Der Untersuchungsgegenstand knüpft an eine Vielzahl aktueller Debatten in den Politikwissenschaften an, z.B. das Studium von politischen Eliten, politischem Kapital, politischen Karrieren, Neueinsteigern, Wiederwahlen von Präsidenten, informellen Institutionen, Rechenschaftspflichten/Accountability, Parteikrisen und der Personalisierung der Politik. Zudem basiert die Relevanz auf der Rolle, die verschiedene First Ladies während und nach ihrer Zeit in der Regierung innehatten. Allerdings konzentriert sich die Forschung hauptsächlich auf die USA, weshalb lateinamerikanische First Ladies nur selten Gegenstand empirischer und vergleichender Studien waren. Das Fehlen von wissenschaftlichen Studien in diesem Bereich ist erstaunlich, insbesondere vor dem Hintergrund der gewichtigen Rolle von First Ladies in der lateinamerikanischen Politik.

Diese Studie zielt darauf ab, die Wissenslücke durch einen empirischen und theoriebildenden Ansatz zu schließen. Die Arbeit zeigt Wege für weitere Studien auf und

etabliert einen neuen, auf vergleichenden, kontextsensitiven und empirischen Daten basierenden Rahmen. Diese Dissertation hat zudem umfassendere Implikationen für die Teilnahme von First Ladies am politischen Prozess, die auch in den USA und afrikanischen Ländern zu beobachten ist. Diese vergleichende empirische Studie ist der erste Schritt in ein neues Wissenschaftsfeld und stellt einen Startpunkt für eine umfangreichere Analyse der First Lady als Teil der Exekutive und der politischen Elite in Lateinamerika dar.

### III. Papers and Presentations related to the Doctoral Thesis

#### Presentations in international academic congresses

- 12/2018 “First Ladies as Members of the Political Elite”, Annual Conference Red Gob, Salamanca, Spain.
- 07/2018 “Elites and rotation: political couples in South America”, International Congress of Americanists (ICA), Salamanca, Spain.
- 12/2017 “When do former first ladies run for office? Lessons from Latin America, Facultad de Latinoamericana de Ciencias Sociales (FLACSO), Santiago, Chile.
- 08/2017 “Former First Ladies in Latin American Elections: A Comparative Analysis, 1990-2016”, XIII Argentinian Congress of Political Science (SAAP), Buenos Aires, Argentina.
- 07/2017 “The Office of the First Lady: Lessons from Latin America, 1990-2016”, IX Latin American Congress of Political Science (ALACIP), Montevideo, Uruguay.
- 07/2017 “Political Career of Former First Ladies in Latin America: 1990-2016”, IV Latin American and Caribbean Congress of Social Science (FLACSO), Salamanca, Spain.
- 11/2016 “A Comparative Analysis of the Latin American First Ladies, 1990-2015”, Pontificia Universidade Católica de Minas Gerais (PUC Minas), Belo Horizonte, Brazil.
- 11/2016 “A Comparative Analysis of the First Ladies: Lessons from Latin America, 1990-2015”, Universidade Federal do Paraná, Curitiba, Brazil.
- 07/2016 “Accountability Gaps and Accountability Promotion: Lessons from the Chilean Case (2006-2015)”, XXIV IPSA World Congress of Political Science, Poznan, Poland.
- 07/2016 “The Office of the First Lady: Lessons from Latin America, 1990-2015” and “Political career of Latin American First Ladies, 1990-

- 2015”, VIII International Congress of CEISAL (Consejo Europeo de Investigaciones Sociales de América Latina), Salamanca, Spain.
- 05/2016 “A Comparative Analysis of First Ladies: Lessons from Latin America, 1990-2015”, Instituto de Iberoamérica, Salamanca, Spain
- 12/2015 “Research Design of a Comparative Analysis of First Ladies in Latin America”, Instituto de Estudios Internacionales, Universidad de Chile, Santiago, Chile.
- 10/2015 “A Comparative Analysis of First Ladies: 1990-2014” Workshop “Executivos e Presidências na América Latina” Universidade Federal de Minas Gerais, Belo Horizonte, Brazil.
- 07/2015 “First Ladies and public policy: a comparative analysis of Latin America”, VIII Latin American Congress of Political Science (ALACIP), Lima, Peru.
- 06/2015 “Female Leadership in Latin American Politics: the case of First Ladies”, International Congress Elites and Leadership in Times of Changes, Universidad de Salamanca, Spain.
- 10/2014 “Women in Latin American politics: the case of the First Ladies”, Latin American Festival, Museum für Völkerkunde Hamburg, Germany.
- 03/2014 “Women in Latin American politics: an approach to the role of the First Ladies”, Foro Internacional “Mujeres, Política, Democracia: Rompiendo los techos de cristal en América Latina”, Universidad de Salamanca (Instituto de Iberoamérica), Organisation of American States (OAS) and United Nations Development Programme (UNDP), Salamanca, Spain.

**Book Chapter**

- 2018 “Mucho más que acompañantes: La irrupción electoral de las primeras damas latinoamericanas, 1990-2016” in Miranda Leibe, Lucia y Suárez-Cao, Julieta. Edit. (2018) “La política siempre ha sido cosa de mujeres: Elecciones y protagonistas en Chile y la región”. Santiago de Chile, FLACSO. Co-authored with Ignacio Arana Araya.

## Selbstdeklaration bei kumulativen Promotionen

**Konzeption / Planung::** Formulierung des grundlegenden wissenschaftlichen Problems, basierend auf bisher unbeantworteten theoretischen Fragestellungen inklusive der Zusammenfassung der generellen Fragen, die anhand von Analysen oder Experimenten/Untersuchungen beantwortbar sind. Planung der Experimente/ Analysen und Formulierung der methodischen Vorgehensweise, inklusive Wahl der Methode und unabhängige methodologische Entwicklung.

**Durchführung:** Grad der Einbindung in die konkreten Untersuchungen bzw. Analysen.

**Manuskripterstellung:** Präsentation, Interpretation und Diskussion der erzielten Ergebnisse in Form eines wissenschaftlichen Artikels.

Die Einschätzung des geleisteten Anteils erfolgt mittels Punkteinschätzung von 1 – 100 %

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