

Party Organizational Development: An Analytical Framework

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Abstract

This article aims at defining an analytical framework for the comparative study of party organizations in liberal democracies. By building on a critical assessment of the literature devoted to party organizations, we combine the premises of Comparative Organizational Analysis, Structural Analysis and the rationale of the dimensional approach of the Political Party Database Project. We also provide a parsimonious mathematical representation of our framework to formalize the discursive exposition of our assumptions. The framework is tested on a case study, the Italian political system from 1993 to 2018, which allows for a quasi-experimental analysis of the co-evolutive relationships between the political system and party organizations. Despite the limitations of testing the framework on a single case, the results indicate that the low stability of the laws and regulations of political competition is actually related to a poor level of party organizational institutionalization; at the same time, their intensity seems to be linked to party organizational convergence, in particular concerning party Structures and resources; however, differently from the evidence raised by literature, a high party system fragmentation is not associated to organizational variance.

1. Introduction

Organization Theory and party studies speak rather different languages (Harmel 2006; Borz and Janda 2018). On the one hand, mainstream Organization Theory pays little to no attention to political organizations, as it focuses primarily on actors operating in the public sector, business firms, social movements, and nonprofit entities (King, Felin, and Whetten 2009; Greenwood et al. 2013). On the other hand, party organization scholars rarely build on analytical frameworks derived from Organization Theory, which consists of a multidisciplinary body of contributions derived from sociology, business management and economics (Tsoukas and Knudsen 2005). Already in the early 1980s, Panebianco (1982) noticed that party studies were scarcely interested in the “real nature” of parties as organizations. Similarly, Janda (1983) argued that scholars had rarely investigated the “essence” of party organization. However, these observations remained in the background of party literature.

Despite this mutual disinterest, we argue that the study of party organizations might benefit from a closer relationship with Organization Theory (Husted, Moufahim, and Fredriksson 2022). In parallel, since Organization Theory suffers from a lack of

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comparative analysis (Whetten 2009), providing a framework for the empirical study of organizational development can contribute to enrich this research field.

The aim of this contribution is thus to define an analytical framework focused on the co-evolutive relationships between party organizations and the political system in liberal democracies, by combining the premises of Comparative Organizational Analysis (COA - King, Felin, and Whetten (2009), Structural analysis (Scott 2002) and the dimensional approach put forward by the promoters of the Political Party Database Project¹. As for COA, we build on an approach whose primary interest rests on the search for a middle ground along the “agency-determinism” continuum of the relationships between the organizations and their environment (Wohlgezogen and Hirsch 2009); Structural Analysis provides the perspective through which we define the concept of party organization and its dimensions; and the rationale of the dimensional approach (Scarrow, Webb, and Poguntke 2017) helps enhancing the theoretical relevance of party organizational variance (Rahat and Kenig 2018), thus challenging the prevailing perspective based on the convergence thesis and party models.

Since our analytical framework works at the system level, we are not concerned with *how* individual parties organize; rather, we focus on *how much parties converge/vary*. Accordingly, party development is conceived in terms of patterns of organizational convergence/divergence, in time, within the same population – and, possibly, across countries.

Despite our enterprise being primarily conceptual, our assumptions are oriented to provide scholars with specific guidelines for comparative empirical analysis. In this respect, we test our analytical framework on the Italian case, by observing the evolution of this party population from 1994 to 2018. Italy has been selected since its political system experienced a huge realignment following the 1992-1993 systemic shock (Harmel and Janda 1994), which brought to the collapse of the so-called First Republic: this allows for a quasi-experimental observation of the organizational patterns followed by the actors that have developed in the decades to come. We acknowledge that the Italian party system represents an outlier in many respects, and that the framework would benefit from a broader comparative testing. Nonetheless, this exploratory analysis allows for a preliminary verification of the robustness of our analytical framework.

The added value of this contribution consists in strengthening the relations between two strands of literature that hardly communicate with each other. Such cross-fertilization can improve the theoretical toolkit of party scholars, to avoid conceptual stretching and ad-hoc definitions of organizational phenomena; as well as the methodological background of organization theorists, who overlook the benefits of the comparative approach.

The article is structured as follows. In section 2 we identify the major flaws of the mainstream literature devoted to party organizations, based on party models. In sections 3 and 4 we lay down the premises underpinning our analytical framework for the study of the relationships between organizations and their environment, while in section 5 we introduce the rationale of the dimensional approach that we privilege, as well as the organizational dimensions considered. In section 6 we formulate and formalize our

¹ See Political Party Database Project: www.politicalpartydb.org.

assumptions, while in section 7 we present our data and methods; in section 8 we test the theory on the Italian case. The conclusions will help summarize our reflections, which are open to further refinement.

2. The study of party organizations

While Organization Theory has somewhat ignored the study of party organizations, this topic constitutes a major strand in Political Science since the beginning of the 20th century. The pioneering works by Ostrogorski and Michels paved the way for a flourishing literature, which was enriched by the contributions of many scholars – to cite a few: Duverger (1954), Kirchheimer (1966), Panebianco (1982), Katz and Mair (1995, 2009; 2018). The study of party organizations has recently been revived by a new wave of research worldwide (Scarrow, Webb, and Poguntke 2017; Borz and Janda 2018; Rahat and Kenig 2018). However, despite the richness of contributions and data, and contrarily to the optimistic arguments posited by Schlesinger (1984)², to date there is still a lack of theorizing in this research field (van Biezen 2005). This persistent *vacuum* can be explained as the by-product of some critical factors.

First, the very notion of party organization does not coincide with any shared definition (Janda 1983). It is possible to maintain that party studies implicitly build upon Duverger’s assumption according to which, when it comes to party organization, authors mainly refer to its structures and the power relations underlying their functioning (Krouwel 2006). However, this identification does not consider other crucial aspects of party organizations (Sartori 2005), nor it allows to appropriately frame the relationships between the parties and their environment (Harmel and Janda 1994). This led to a proliferation of definitions of party organization and other adjacent concepts (such as organizational building, institutionalization, adaptation, or change), most of which are used uncritically or stretched to a great extent (Harmel and Svåsand 2019).

Second, the study of party organizations cannot be identified with a unitary approach. Party organizations have been investigated through alternative or complementary interpretations, which can be subdivided into at least three major veins (Harmel 2006): the environment-induced change approach, the life-cycle approach, and the discrete change approach. In particular, the mainstream literature is deeply rooted in the first one (Harmel and Janda 1994), based on the identification of a succession of ideal-typical models (Katz 2017; Krouwel 2006)³. However, resorting to party models does not allow to effectively address the question of organizational dilemmas and trade-offs, since the approach is flawed by sociological prejudice (Panebianco 1982) or, in Pierson’s words, by “societal functionalism” (Pierson 2004). The predominance of this perspective (March and Olsen 2009), which is built upon the assumption that the broader socio-economic, demographic, cultural and technological

²In his well-known article *On the theory of party organization*, Schlesinger (1984, 373) argued that “To say that we lack a theory of party is to overstate the case. Rather, a theory exists embedded in most of our writings on parties, but we seldom see it as a whole”.

³While the life-cycle approach aims at linking party organizational change to specific stages of party development, the discrete change approach underlines the incremental and limited nature of party organizational change, which is the by-product of both internal and external factors (Harmel 2006).

environment *determines* politics, brought scholars to frame party organizational development simply in terms of adaptation or decline, «sometimes as competing concepts and sometimes as concepts that highlight the different faces of the same phenomena» (Rahat and Kenig 2018, 17).

Third, as the importance assigned to societal pressures has been overestimated (Harmel and Janda 1994), parties' organizational *convergence* has become the focus of the interpretations provided by scholars (Rahat and Kenig 2018; Pizzimenti et al. 2022). Since Western liberal democracies are (supposedly) characterized by similar environmental dynamics (Dalton and Wattenberg 2000), as well as by the same set of pressures coming from the supranational level (Katz and Mair 2009; Caramani 2010), then political parties are expected to look alike. In this vein, cross-country variance has been overlooked to the benefit of generalizations (Rahat and Kenig 2018). However, recent empirical analyses show how party organizations vary indeed (Poguntke et al. 2016; Rahat and Kenig 2018; Masi and Pizzimenti 2022; Pizzimenti et al. 2022).

Finally, while the environment-induced change approach has privileged the isomorphic tendencies linked to extra-political factors, the differences in the features of the political systems have been rarely included among the predictors of party organizational development (Poguntke, Scarrow, and Webb 2020; Masi and Pizzimenti 2022).

Given these premises, we maintain that, with few and outdated exceptions (Panebianco 1982; Janda 1983), party literature has not yet adopted an organizational-oriented perspective, that is, a more fine-grained reflection on party organization *per se* (van Biezen 2005). At the same time, by looking at the party-environment relationships only in terms of organizational adaptation/decline it has not adequately investigated the active role political parties play in shaping the external context. In this respect, Organization Theory may help fill this gap.

3. Organizations and their environment

Organization Theory is a multidisciplinary body of scholarly work interested in explaining organizational structure, performance, and survival, through the development of a general theory and analytical tools that can be applied to all types of organizations (Tsoukas and Knudsen 2005). When looking at the relationships between organizations and their environment, the research focus of Organization Theory has moved over time from a micro-level towards higher levels and units of analysis, along what Wohlgezogen and Hirsch (2009) have defined the “agency-determinism” continuum. At the opposite poles we find unidirectional explanations of the organizations-environment relationships, whether dominated by the actors or by the context. As for the former, after World War II, Comparative Organizational Analysis put forward by R.K. Merton and the Columbia School was the mainstream approach in American organizational sociology: it focused on case studies at unit level, as it was committed to enhance actors' purposive behaviour within organizational structures (King, Felin, and Whetten 2009). Organizations were not just reflections of their environment: rather, internal organizational dynamics were seen to bring to heterogenous strategies and outcomes.

Similarly to the tendencies registered in party studies, however, at least since the 1970s the search for convergence and similarities in organizational phenomena – primary driven by changes in technology, economic forces, standards and ideological drivers (Scott 2008) – has become predominant also in Organization Theory (Di Maggio and Powell 1983; Meyer et al. 1997). In this vein, the emerging macro-sociological strand of research (Boli and Thomas 1997) was built upon the premise that organizations are primarily shaped by the broader socio-cultural environment (Hasse and Krücken 2013). As far as supra-national/globalizing processes of a social, cultural and economic kind had brought nation-states to look alike, cross-country convergence in organizational structures was the expected end-result.

In a similar fashion, according to a meso level interpretation, new-institutional theorists have emphasized how the specificities of different organizational fields (Di Maggio and Powell 1983), organizational populations (Hannan and Freeman 1977) and networks (Granovetter 1985) constitute the main forces pushing towards organizational convergence (or isomorphism). Even recent theoretical debates revolve around the source and types of requirements that organizations have to comply with; however, a renewed interest toward the actual ability organizations show to modify contextual pressures has emerged (King, Felin, and Whetten 2009).

In this vein, Wohlgezogen and Hirsch (2009, 153) suggest to “[...] highlight a move toward the middle ground of the agency–determinism continuum, that is, varieties of interaction and mutual influence between actors and their environments across levels of analysis [...]”. This shift brought scholars to reconsider the relationships between the organization-level and the context-level in term of the “mechanisms” that bring to their parallel *co-evolution* (Greenwood, Hinings, and Whetten 2014). In this perspective, organizations are neither isolated, environment-manipulating players; nor passive actors whose profiles and strategies are shaped by external pressures. Instead organizations are considered active forces that deliberately operate to modify their context, in time and space (Aldrich 2009). This co-evolutionary approach is well depicted by Wohlgezogen and Hirsch through the “negotiation framework” approach, which is based

[...] on two operational constructs that can be utilized in empirical research: negotiation space, the context in which actors conceive of and implement action, and negotiation moves, the acts through which actors attempt to define, defend, or redefine their role and realm of options (2009, 162)

The concept of “negotiation” is useful as it focuses on the interactive patterns of co-evolution between organizational behaviors and choices, on the one hand, and environmental opportunities and constraints on the other. Within a specific negotiation space, the focal organizational actors adopt their negotiation moves with regards to the characteristics of the context, whose boundaries are set by the concomitant agency of other relevant players (actors of the same or of a different nature). The contextual forces that enable or constrain actors’ negotiation moves influence (without fully determining) their choices, by opening different opportunity windows to organizations. Negotiation moves thus represent the patterns of interactions between the actors and their environment. Organizations’ goals, strategies and coordination are the main elements of negotiation moves.

While providing a useful perspective to analyze the organization-environment relationships, the negotiation framework pays scant attention to organizations' structural features. In this respect, it seems promising to enrich the negotiation framework with a more in-depth analysis of organizations' structural heterogeneity/convergence. Structural analysis can be placed in between the traditional rational systems and open systems approach to organizational analysis (Scott 2002). On the one hand, organizations are considered as deliberately built structural projects, whose creation is aimed at pursuing specific goals, through different combinations of strategies and resources; on the other hand, such projects are not conceived in a vacuum since organizations have to comply with a set of contextual requirements, which correspond to the boundaries of their negotiation space (whether legal, institutional, cultural, social etc.). Depending on individual organizations' development, different organizations within the same population adopt different negotiation moves according to their strategies, structures and resources.

4. Political parties as an organizational population

Political parties represent a rather peculiar organizational population. In liberal-democracies, parties are the main collective actors competing to control the representative institutions (von Beyme 1985; van Biezen 2005), which constitute the legitimated source of (re)production of the regulative structures of the polity, that is, the set of laws and regulations that discipline State's organizational fields. Differently from other organizational populations, in fact, parties that access State representative institutions hold the legitimate power to make coercive decisions which are mandatory for the entire polity. While a bulk of theory has focused on the role of parties as *agents* of a third part (the civil society or the State), little attention has been paid to the role played by political parties as *institutionalization agencies*, which subsumes all their other functions, be they representative or procedural (Bartolini and Mair 2001). Parties are crucial institutionalization agencies as they contribute to channel the political conflict within a predetermined framework of accepted regulative structures; and to promote the values and founding principles of the political community, by favoring the persistence or change of those regulative structures in time. Furthermore, differently from other types of organizational populations, political parties are entitled to discipline their own negotiation space (Mair 1997; Katz and Mair 2018). This autopoietic, self-organizing system includes all the rules governing or impacting political competition and party organizations: electoral laws, campaign laws, political finance laws, party laws, as well as media laws, laws on civil association, national Constitutions, administrative rulings, legislative statutes etc.

Political parties should thus be seen as a relatively autonomous organizational population within the broader social system (Sartori 2005; Olsen 2009). Contrarily to the environment-induced change approach, then, parties cannot be considered "solely as reflections of society" (March and Olsen 2009, 4), or the adaptive/declining by-product of "[...] the driving forces of societal development [...]" (Hasse and Krücken 2013, 541). The control over State institutions makes parties - at least the competitive ones (Sartori 1976) - peculiar: and the processes of their organizational development can be considered as primarily (albeit not entirely) associated with factors belonging to their specific negotiation space.

5. The dimensions of party organizations

Since our contribution aims at building bridges between Organization Theory and party studies, we are interested in combining the premises of COA, Structural Analysis and the rationale of the dimensional approach elaborated by Scarrow, Webb, and Poguntke (2017). Poguntke, Scarrow, and Webb (2020) have highlighted how different political-institutional contexts are associated with different patterns of organizational development *despite* possible cross-country similarities in socioeconomic, technological, demographic or cultural factors. Similarly to COA, then, the possibility that parties diverge in their organizational profiles is considered *at least as plausible as* their convergence. Organizational configurations are not predictable *a priori* since, in pursuing its goals through negotiation moves, each organization adopts different strategies and structural templates, being provided with variable resources; at the same time, the patterns of interaction with the other actors may show different degrees of stability, depending on cases.

By building on a rational open system approach (Scott 2008), we consider organizations as entities that are deliberately projected to pursue specific goals, whose achievement is influenced by the types of relationships developed with their environment, with which organizations exchange fundamental resources in order to survive and to reproduce/modify the existing settings. We thus adopt the rationale of the approach put forward by Scarrow et al (2017), even if we opt for a different classification of party organizational dimensions, more in line with Organization Theory. To heuristic aims, we resort to a taxonomy by subdividing organizational dimensions into three classes (*extra-organizational*, *liminal* and *intra-organizational*), which are further split into more specific analytic sub-dimensions. In the following paragraphs, we introduce each item.

5.1. Extra-organizational dimensions

Party organizations move within a specific negotiation space, which we primarily identify with the political system. Political systems differ in terms of their institutional settings (Panbianco 1982; Lijphart 1999), which correspond to the regulative structures disciplining the political competition. We consider the *stability* and *intensity* of the regulative structures, over time, among the main factors associated to party organizational development. As for the intensity, it differs considerably across countries in terms of the “intrusiveness” of party regulation in party life (Piccio 2012; Gauja 2016; Pizzimenti et al 2024). Coming to the stability of the regulative structures, it is a key variable to analyze the predictability of parties’ negotiation moves – their patterns of interaction (Harmel and Janda 1994; Mair 1997). Moreover, as recent contributions suggest (Masi and Pizzimenti 2022), the fragmentation of the party system in the electoral, parliamentary, and governmental arena (Bardi and Mair 2008) seems to be in a relation with party organizational dynamics: in fact, in highly fragmented party systems, parties are expected to adopt more variable organizational profiles to stand out from each other. Finally, not all existing parties deserve to be included in the focal population of the party system, since only competitive parties (those parties that are successful in electing their candidates to the Parliament at least once in the analyzed

period – Harmel and Janda 1994) are worth of analysis. Among competitive parties, particular attention must be paid to institutionalized parties (Harmel and Svåsand 2019). Institutionalization is framed as both a process that characterizes the whole organizational development; and as a property of each organizational dimension (Olsen 2009). In the former sense, institutionalization refers to the overall level of stability reached by the organizational configuration; in the latter, it is a variable attribute of each organizational dimension, as parties do not show the same degree of institutionalization along every dimension.

5.2. Liminal dimensions

Party goals constitute an intermediate dimension in between the negotiation space and the organizational boundaries. Goals can be split into two different categories: general, which are common to all organizational forms (*survival, domain selection, autonomy*); and party specific, among which *entering the representative institutions* can be considered the primary goal of this organizational population (Schlesinger 1984; von Beyme 1987).

5.3. Intra-organizational dimensions

Among party strategies, the *intra-party power concentration* — that is the vertical distribution of decision-making powers at different organizational layers – is crucial. In fact, organizations’ capacity to act as unitary actors varies according to the extent to which decision-making powers are concentrated at specific organizational layers; or shared between different organs, set at different levels. Parties also adopt different combinations of *incentives* to be distributed among their participants: incentive strategies follow different logics according to the amount and types of resources at parties’ disposal. In general, parties tend to recur to all forms of incentives, whether material, symbolic, or implicit (Achury et al. 2020). Finally, *maximizing the role of the party leader* can be conceived as an organizational strategy built upon the personal characteristics of the party top official; while *maximizing intra-party democracy* implies that significant powers are assigned to intermediate party bodies and party members (von dem Berge et al. 2013).

As for structures, parties present variable degrees of *formalization* (Anderson 1968), that is, the set of codified schemes of interaction between their units. This codification is generally disciplined in the party statute and in other related regulations (what is commonly referred to as parties’ official history – Katz and Mair 1992). Party *structural differentiation*, instead, recalls the concepts of systemness (Panebianco 1982) and structural articulation (Janda 1980). In this respect, party organs are generally articulated along territorial, functional, dimensional criteria, operational and representativeness criteria.

Finally, organizations must be able to mobilize and employ appropriate amounts of resources to pursue their goals. Resource types are classified into four categories: *human, physical, financial/economic* and *technical*. *Human* resources refer to all the organizational participants. Further distinctions can be made according to literature: party members, party supporters, party staff, party officials, party top leaders and party

institutional representatives⁴. The *physical* structures where the participants carry out the activities related to the functioning of the organization are generally tailored along spatial as well as institutional criteria (Janda 1980; Panebianco 1982; Deschouwer 2003). The study of party *financial/economic* resources covers crucial aspects of the reflections dedicated to party organization. To our aims it is relevant to identify different types (and amounts) of economic resources managed by parties, thus distinguishing between party revenues and party expenses. Among the former, it is possible to identify grass-roots revenues (voluntary contributions), plutocratic funding (interested money) and public subsidies (law-based direct and indirect funding, when available). Among party expenses, a distinction can be drawn between operational costs (the resources allocated for the ordinary functioning of the organization) and electoral expenses (the amount of resources spent for campaigning). Finally, parties' *technical* resources are mostly concentrated in the fields of communication and propaganda/mobilization (Farrell and Webb 2000; Norris 2002).

6. Assumptions and formalization

Our proposed analytical framework is conceived as a heuristic strategy to identify patterns of possible co-evolution between political systems and party organizations. In line with Harmel and Janda's (1994) discursive scheme, we resort to the concepts previously introduced to elaborate specific assumptions. Even if we are well aware that party-specific intra-organizational dynamics have an impact on individual party organizational development, our primary goal is to define a framework that works at the system level. Our assumptions will thus refer only to the relationships between the political system and the party organizational population considered as a whole. For each assumption we provide a mathematical formalization that can serve as a basis for comparative empirical analysis. For this mathematical formalization, we assume that the time $[0, T]$ under analysis is discrete:

$$[0, T] = \{0 = t_0 < t_1 < \dots < t_N = T\}.$$

Our assumptions will concern the following seven variables, whose values at time $t \in [0, T]$ will be denoted as follows:

- Stability of the regulative structures: $ST(t)$;
- Intensity of the regulative structures: $INT(t)$;
- Party organizational institutionalization: $POI(t)$;
- Fragmentation of the party system: $FRG(t)$;
- Party organizational profiles: $POP(t)$;
- Party structures: $PStr(t)$;
- Party resources: $PRes(t)$.

The specification of each measurement will be provided in the next section. If Q is any of these measurements, $Var(Q)(t)$ will denote the variance of Q at time t . While we assume that all competitive parties share the same general and specific goals, we

⁴See van Biezen, Mair, and Poguntke (2012) and Achury et al. (2020) for party membership; (Bardi, Calossi, and Pizzimenti 2017) for the party in public office; (Farrell and Webb 2000; Webb and Kolodny 2006) for party staff.

maintain that political parties adopt and implement different combinations of strategies, structures and resources, which enable them to operate within their negotiation space. The features of the political system are relevant since they have a cross-cut impact on parties. Parties operating in a stable framework of rules are expected to show higher levels of organizational institutionalization. This entails that the higher the stability of the political system, the higher the share of institutionalized parties on the total number of competitive parties. Consequently, our first assumption is the following:

A1: The stability of the regulative structures and party organizational institutionalization are in a positive correlation.

For all $i, j \leq N$, $St(t_j) - St(t_i) \geq 0$ if and only if $POI(t_j) - POI(t_i) \geq 0$.

In a similar fashion, also the intensity of the regulative structures is expected to have an impact on party organizational development: party populations that are subject to higher levels of regulation are expected to show low organizational variance, as regulative structures act as homogenizing agents. It follows that:

A2: A high intensity of the regulative structures corresponds to low variance in party organizational profiles.

For all $i, j \leq N$, $Int(t_j) - Int(t_i) \geq 0$ if and only if $Var(POP)(t_j) - Var(POP)(t_i) \leq 0$.

Parties that are not subject to intense public regulation are provided with higher degrees of freedom in adopting their organizational templates. Even if the topic is still underdeveloped at the empirical level, according to the literature (Piccio 2012; Casal Bértoa, Piccio, and Rashkova 2014; Pizzimenti, Piccio, and Masi 2024), party structures and party resources are more likely to be impacted by law; while party strategies are more dependent on individual party attitudes and organizational culture. Therefore our fourth assumption is:

A3: A high intensity of the regulative structures corresponds to low variance in party structures and resources.

For all $i, j \leq N$ $Int(t_j) - Int(t_i) \geq 0$ if and only if $Var(PStr)(t_j) - Var(PStr)(t_i) \leq 0$ and $Var(PRes)(t_j) - Var(PRes)(t_i) \leq 0$.

Finally, besides regulative structures, the fragmentation of the party system can be considered another relevant factor impacting on party organizational development. In fact, fragmented party systems are expected to be characterized by tendencies towards organizational divergence, as parties have more incentives to adopt distinctive organizational profiles (Masi, Pizzimenti 2022). This entails that:

A4: The fragmentation of the party system and variance in party organizational profiles are in a positive correlation.

For all $i, j \leq N$, $FRG(t_j) - FRG(t_i) \geq 0$ if and only if $Var(POP)(t_j) - Var(POP)(t_i) \geq 0$.

7. Data and methods

Our analytical framework will be tested on the Italian case through a diachronic analysis that covers the period 1993-2018. The Italian case is particularly fit for the study of party

organizations, since the country was invested by a systemic shock between 1992 and 1994, according to the criteria identified by Harmel and Janda (1994): several factors of both exogenous and endogenous nature radically transformed the established political system (Jones et al. 2015; Pizzimenti 2020). The magnitude of the systemic shock thus allows for a quasi-experimental observation of the patterns of party organizational development in the following 25 years. We acknowledge that testing our analytical framework on such an extreme case could lead to drawing limited conclusions about its external validity. However, the Italian case represents a valuable exploratory testing ground: the analytical framework’s focus on the co-evolutive relationships between the political system and party organizations, as well as its parsimony, makes it easily applicable to a large gamut of liberal-democracies.

Table 1. Analyzed documents

Party	Statutes	Balance Sheets
PDS-DS	1991; 2005	1994; 2005
PPI-DL	1995; 2006	1995; 2006
PD	2015	2015
FI	1998; 2004; 2017	1998; 2004; 2017
AN-FDI	1995; 2006; 2018	1995; 2006; 2018
LN	1998; 2002; 2015	1998; 2002; 2015

Source: own elaboration.

The process of continuous modifications that have characterized the evolution of the Italian party population brought us to include only those parties that show continuity to some extent, and their mergers: PDS-DS; PPI-DL; PD; FI; AN-FDI; LN (see the Appendix for party full names). To assess the level of party organizational variance, we resort to an in-depth analysis of the official story (Katz and Mair 1992; Smith and Gauja 2010) of the analyzed parties, which has been integrated with data on voters derived from official sources (<https://elezioni.interno.gov.it/>) and membership figures drawn from secondary literature (Bardi et al 2007; Pizzimenti 2020). The total number of statutes analyzed is 14 (see Table 1). The study of the official story of political parties (Katz, Mair 1992; Scarrow et al 2017) has often been considered controversial: most of the criticisms deny the possibility to get a realistic picture of the “actual” dynamics of party life. However, although statutes, programs, and balance sheets do not consent to an all-encompassing analysis, they represent valuable sources for comparative studies (Smith, Gauja 2010; Katz 2017). Knowing the official story of a party is a precondition to assess the validity of the information gathered through other sources. Moreover, party statutes can help identify the horizontal/vertical distribution of organizational powers between party organs and party layers: they are the “map” which condenses the representation of intra-party authority, the degrees of freedom accorded to party articulations, the role assigned to party members etc. (Poguntke et al 2016).

In Table 2 we report the analyzed dimensions, which have been selected according to our premises. For each dimension, we identify a number of sub-dimensions, the related indicators and indexes as well as the range of their values (see Appendix for more details). As for the sub-dimensions pertaining to the dimension “Political System”, *Stability* (ST) is calculated as the ratio between the number of reforms in the laws and regulations disciplining the political competition and the number of years covered by the

analysis considered: the values range from 0 (no reform) to a possibly infinite number of reforms. The *Intensity* (INT) of party regulation is measured by assigning a score to the sources of law in force, ranging from 0 (No regulation) to 6 (Highest Intensity) – see Appendix for details. We measure *Party System Fragmentation* by resorting to 3 indicators drawn from the secondary literature: Electoral Fragmentation (EFRG), Parliamentary Fragmentation (PFRG) and Governmental Fragmentation (GFRG) – see Siaroff 2019. We also calculate a general Fragmentation Index (FRG) as the mean value of the 3 indexes. Looking at the *Focal Population*, we consider as “institutionalized” (INS) a party that, over a timespan corresponding to 3 national elections, has not significantly altered its organizational order (Arter and Kestilä-Kekkonen 2014). We also include in our analysis the total number of parties contesting each election in the period and the number of Competitive parties, that is the number of parties winning seats to the Chamber of Deputies in each election.

Table 2. Dimensions, sub-dimensions, variables, indexes and indicators

Dimension	Sub-dimension	Variable	Range	
Political system	Stability of the regulative structures	ST: (N°Reforms/N°Years)	0 - ∞	
	Intensity of the regulative structures	INT: EL+PFL+PL+PC	0-6	
	Focal population	N° Competitive Parties/Tot parties	0-1	
		N° Institutionalized parties/Competitive parties	0-1	
	Party system fragmentation	Electoral Fragmentation (EFRG)	0-1	
		Parliamentary Fragmentation (PFRG)	0-1	
		Governmental Fragmentation (GFRG)	0-1	
	Party Organization	Strategies	Intra-Party Power Concentration Index (PCI)	0-1
			Party Leader Maximization (PLM)	0-1
			Intra-party Democracy Maximization (IPD)	0-1
Incentives (INC)			0-1	
Party Organization	Structures	Formalization Index (FORM)	0-1	
		Structural Differentiation Index (SD)	0-1	
	Resources	Human (M/V)	0-1	
		Financial (Public Funding/Total Party Income)	0-1	
		Technical (Electoral Expenses//Total Party Income)	0-1	

Source: own elaboration.

Coming to “Party Organization”, *Party Strategies* are registered through 4 variables. Intra-party power concentration concerns the distribution of power at different party layers. Here, in line with the methodology adopted by Pizzimenti and Calossi (2018; 2020), we combine the level of ex-officio involvement of regional representatives in the party national organs with the level of autonomy assigned to the party regional organs (see Appendix), to obtain an index of power concentration (PCI) ranging from 0 (the highest the role played by the national organs) to 1 (the highest the powers and autonomy assigned to the regional organs). The maximization of the role of the party leader (PLM) and the maximization of the intra-party democracy (IPD) are calculated by resorting to a number of variables (see Appendix), measuring the powers and prerogatives of the party highest representative; and members’ involvement in leader and candidate selection: both indexes range from 0 (parties with a weak leadership and low levels of intra-party democracy) to 1 (parties with a strong leadership

and high levels of intra-party democracy). Coming to incentives (INC), we analyse the level of membership openness, that is the role and powers assigned to members and other possible rank-and-file figures such as sympathizers or supporters: this is calculated by resorting to 6 indicators (See Appendix): the index ranges from 0 (closed membership) to 1 (open membership). As for *Structures*, formalization corresponds to the codified schemes of interaction between party organs, which are measured through 8 variables (see Appendix) whose values range from 0 (poor formalization) to 1 (high formalization); structural differentiation identifies the level of complexity of party organs, analysed through 5 variables (See Appendix) ranging from 0 (low differentiation) to 1 (high differentiation). Finally, concerning party *Resources*, we have included indicators for all the relevant sub-dimensions but physical resources, since available data are neither complete nor reliable for most of the parties in our sample. As for human resources we resort to the Members/Voters ratio; economic resources are calculated resorting to the ratio between party public funding and party total income; while technical resources are measured through the quota of funds allocated to electoral campaigning on party total income.

8. Empirical analysis and findings

As Table 3 shows, in the 25 years following the 1992-1993 systemic shock, the registered value of ST stands in the lower half of the range (ST = 0.44). Differently from the past 45 years, during the so-called Second Republic the electoral laws at all institutional levels were reformed, and even the law disciplining national elections was modified three times. Moreover, the continuous changes in the party funding regime (7 significant modifications were approved by the Parliament) has been described as a process of “normative layering” (Pizzimenti 2017) – whereby new norms were laid over the old ones.

Table 3. Regulative structures stability and party organizational institutionalization

Period	ST	INT	A Total parties (Mean Value)	B Competitive parties (Mean Value)	C Institutionalized parties (Mean Value)	B/A	C/B
1994-2018	0.44	4	38.4	8.4	2.6	0.25	0.31

Source: own elaboration.

In parallel, the number of institutionalized parties looks very limited, both in absolute terms and in relative terms (as calculated on the number of competitive parties). At the 1994 election, none of the parties that won seats to the Chamber of Deputies could be considered as institutionalized according to our criteria. In 2018, none of them existed any more, except for FI (that had temporarily merged with AN, from 2009 to 2013) and LN⁵. In line with our assumption A1, then, a rather low level of stability of the regulative structures of political competition is accompanied by a low share of institutionalized parties on the number of competitive parties (0.31).

⁵The PRC was one of the parties that won seats in 1994: however, since the party ceased to be competitive in 2008, we opted not to include it in our sample.

We now point to the intensity of party regulation. The value is consistent (INT=4), even if the overall regulative framework is far from univocal. On the one hand, despite the Italian Constitution (art. 49) recognizes explicitly parties' fundamental role for democracy (Piccio 2012), Italian parties have always been disciplined as private associations. However, the recent Law 13/2014 on party funding introduced a form of party regulation (in terms of party registration as well as of controls on party statutes) as a pre-condition to access indirect public funds. According to scholars (Allegrì 2020), this reform has to some extent implemented the constitutional provision concerning the "democratic method" that should inform intra-party dynamics.

Having ascertained that, from 1994 to 2018, the stability and the intensity of the regulatory framework ran in parallel to a poor institutionalization of the party population, we now point our attention to the level of party organizational variance (Table 4), to verify the assumed existing relationships between INT and variance in party organizational profiles (A2 and A3).

Table 4. Party organizational sub-dimensions

	Strategies				Structures			Resources	
	PCI	PLM	IPD	INC	FORM	SD	M/V	PF/TOT	ELEC/TOT
Mean	0.47	0.63	0.15	0.45	0.50	0.45	0.05	0.55	0.23
St. Dev	0.17	0.16	0.16	0.33	0.05	0.09	0.03	0.16	0.21

Source: own elaboration.

In Table 4 we report the values registered along each sub-dimension. We first focus on party Strategies. The mean value of PCI shows that, on average, Italian parties adopted moderately regionalized organizational templates: in this respect, the variance in party organizational choices, at the population level, looks modest. By focusing instead on the maximization of the role of the party leader (PLM) and the maximization of the intra-party democracy (IPD), our indexes show that the parties in our sample have, on average, empowered their leaders while limiting the bottom-up selection of both candidates to national elections and the top party position: also in these cases, it is possible to register an all in all limited variance. On the contrary, coming to incentives (INC), party organizational variance is significant (St. Dev: 0.33) with the mean value set at 0.45 – that is an organizational profile in which party boundaries are somewhat closed. Also concerning Structures and Resources party variance is limited. As for the former, the values of both formalization and structural differentiation indexes are set in the middle of both scales, with practically no variance; as for the latter, variance is higher concerning the indicator measuring the quota of the party income devoted to electoral expenses. According to A2, these findings seem to confirm that higher regulative intensity corresponds to lower levels of party organizational variance – despite some exceptions, in line with the rationale of the dimensional approach.

Table 5. Party organizational dimensions and party organizational profile

	Strategies	Structures	Resources
Mean	0.43	0.48	0.28
St. Dev	0.21	0.07	0.13

Source: own elaboration.

Next, coming to our assumption A3 – which affirms that high levels of intensity of the regulative structures makes variance in party structures and resources to diminish – it is possible to observe (Table 5) how variance is actually higher concerning party *Strategies*, thus confirming that parties tend to converge more along their Structures and Resources⁶.

Lastly, with regards to the fragmentation of the party system (Table 6), it is possible to observe how the reforms adopted in these decades failed to achieve their main objectives – namely, to diminish the electoral and parliamentary fragmentation. Moreover, during the whole period, the number of parties in government ranged from 2 (in 2018) to 8 (in 2000): while the First Republic was a “frozen” political system, where the parties in government were more or less the same through different combinations, the new patterns of competition emerged in 1994 brought to a significant alternation.

Table 6. Regulative structures intensity and the fragmentation of the party system

Period	EFRG	PFRG	GFRG	FRG
1994-2018	0,8	0,8	0.49	0.7

Source: own elaboration.

However, no relationship seems to exist between the fragmentation of the party system and party organizational variance, thus refuting our assumption A4 and in contrast to the evidence that emerged in recent comparative analyses (Masi, Pizzimenti 2022).

9. Conclusive remarks

The study of parties and Organization Theory have rarely talked to each other. The aim of this article was to contribute to fill this gap. In this respect, our primary goal was to define a basic analytical framework focused on the co-evolutive relationships between party organizations and their environment in liberal democracies, by combining the premises of Comparative Organizational Analysis, Structural analysis and the dimensional approach put forward by the promoters of the Political Party Database Project. We built our framework around the concepts of dimensional convergence and divergence, in time, enabling a fine-grained analysis of party organizational development at the system level. We tested four assumptions, concerning seven sub dimensions of the political system and party organization, on a rather peculiar case: the Italian party system between 1993 and 2018. The Italian case is particularly interesting, as it provides a quasi-experimental research design as a consequence of the systemic shock suffered by the political system and the party population in 1992-1993. Our data tend to confirm our assumptions, except for A4: an unstable regulatory framework of the political competition actually co-evolves with poorly institutionalized party organizations; at the same time, the rather high intensity of the regulations disciplining the political competition correspond to a tendency to organizational convergence, despite divergence emerges along a (limited) number of dimensions – a finding that

⁶For each dimension, the index is calculated as the mean value of the scores reported along each sub-dimension.

corroborates the validity of the dimensional approach. In this respect, party Strategies represent the dimensional cluster that shows higher variance compared to both Structures and Resources – which is consistent with the comparative literature in the field. On the contrary, the evidence raised through the empirical analysis concerning the assumed existing relationship between party system fragmentation and variance in party organizational profiles contradicts the recent comparative findings: probably, while fragmentation constitutes a structural feature of the Italian party system since 1948, the increased intensity of the laws and regulations disciplining the political competition in the last decades had a predominant impact on party organizational choices.

All in all, the “exceptional nature” of the Italian case – as assumed by the literature – seems to be mitigated to some extent. Also, testing the robustness of our analytical framework on a single case limits our ability to generalize our results, which would benefit from a larger comparison: in this respect, our analytical framework could be further refined, to include other dynamics of the relationships between political systems’ features and party organizational development. However, even as it stands now, it shows some potential to explain party development.

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Appendix

Table A1. Parties included in the analysis

Partito Della Sinistra / Democratici di Sinistra (PDS / DS)
Partito Popolare Italiano / Democrazia è Liberta (PPI / DL)
Partito Democratico (PD)
Forza Italia (FI)
Alleanza Nazionale (AN)
Fratelli d'Italia (FdI)
Lega Nord (LN)

Source: own elaboration.

Table A2. Variables and indexes

Stability – ST = Number of Reforms/Number of Years

Intensity – INT = Electoral law + Party Funding Law + Party Law + Party Constitutionalization

- Electoral Law = 0
- Party Funding Law = 1
- Party Law = 2
- Party Constitutionalization = 3

FOCAL POPULATION

- Number of Competitive Parties/Total parties
- Number of Institutionalized parties/Competitive parties

FRAGMENTATION

- Electoral Fragmentation (EFRG) (Siaroff, 2019)
- Parliamentary Fragmentation (PFRG) (Siaroff, 2019)
- Governmental Fragmentation (GFRG) – Average number of parties in government

PARTY ORGANIZATION⁷

Strategies

- Intra-Party Power Concentration Index (PCI) = (Involvement + Autonomy)/2
 - Involvement of regional representatives in national organs

Coding

0 – No rules in the statute about the body composition

1 – Only regional delegates

2 – Partially composed of regional delegates with voting rights

3 – Partially composed of regional delegates without voting rights

4 – No regional delegates, which can still be invited/consulted

5 – Only national delegates

6 – No involvement, the function is performed exclusively by leadership and/or direct membership consultations

Variables

- Leadership selection body composition
- Candidate selection body composition
- Electoral strategies drafting body composition
- Executive body composition

⁷ After coding, all values have been recalculated to have a 0-1 interval for all variables.

- Autonomy of regional organs at the regional level

Coding

- – No autonomy, the function is performed exclusively by leadership and/or direct membership consultations
- 1 – Only national delegates/representatives
- 2 – Partially composed of national delegates/representatives with voting rights
- 3 – Partially composed of national delegates/representatives without voting rights
- 4 – No national delegates, which can still be invited/consulted
- 5 – Only regional delegates
- 6 – No rules in the statute about the body composition

Variables

- Leadership selection body composition
- Candidate selection body composition
- Electoral strategies drafting body composition
- Executive body composition

- Party Leader Maximization (PLM)

Coding

- – No
- 1 – Yes

Variables

- Presence of more than one leader
- Party leader has exclusive representation of the party
- Party leader has the power to summon the party congress
- Party leader has the power to summon the party executive organ
- Party leader has the power to decide on party organizational structure
- The party leader nominates his own cabinet
- The party leader manages the party name and symbol
- The party leader authorizes the deposit of candidates lists and symbol

- Intra-party Democracy Maximization (IPD)

Which body has the final say in selecting leadership/candidates

- Leadership selection
 1. Party congress
 2. Highest executive organ
 3. Another national body
 4. Party Leader
 5. Party Members
 6. Semi-open primaries
 7. Open primaries
- Candidates selection
 1. A sub-national body
 2. A national body
 3. A specific body for this function
 4. Party leader
 5. Closed primaries
 6. Semi-open primaries
 7. Open primaries

- Incentives (INC)

- Party statutes recognize a separate level of formal affiliation with reduced obligations and reduced rights (for instance, party “friend” or “registered sympathizer”). This does not include members with reduced dues but full rights, such as reduced fees for young people or unemployed.
 - Only members
 1. Members and sympathizers
- Presence of a register for non-members
 - No
 1. Yes

Party Organizational Development

- Is it possible for an individual to join the national party directly?
 - No
 - 1. Yes
- Are there temporal limits to membership?
 - No
 - 1. Yes

Structures

- Formalization Index (FORM)
 - Coding*
 - 0 – Not mentioned in party statutes
 - 1 – Only mentioned
 - 2 – Partly disciplined
 - 3 – Disciplined in detail
 - Variables*
 - Objectives/Preamble
 - Party symbol
 - Membership
 - Basic units
 - National governance
 - Sub-national governance
 - Management of finances
 - Guarantee bodies
- Structural Differentiation Index (SD)
 - Number of layers
[Number]
 - Does the statute calls for a party secretary?
 - Yes
 - 1. No
 - Does the statute calls for a party president?
 - Yes
 - 1. No
 - Number of executive organs at the national level
[Number]
 - Number of administrative organs at the national level
[Number]

Resources

- Human
 - Members/Voters
- Financial
 - Public Funding/Total Party Income
- Technical
 - Electoral Expenses//Total Party Income

Source: own elaboration.