

Religion and Political Activism in Mexico

by

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## ABSTRACT

Why do religious organizations facilitate secular political activism in some settings and not others? This dissertation uses regional variation in political activism across Mexico to elucidate the relationship between religious organizations and political activism, as measured through associational activity and involvement in political protests. I utilize a quantitative analysis of 13,500 data observations collected from the nationally representative National Survey of Political Culture and Citizenship (ENCUP), supplemented by municipal and diocesan-level data from a variety of governmental and Church statistical databases, to test several theories describing religion's potential impact on political activism. I also utilize a qualitative comparative analysis examining the relationship between the Catholic Church and political mobilization in the Mexican States of Chiapas, Morelos, and Yucatán. I present an agent-based model developed to delineate the micro-level mechanisms linking Church institutional configurations and religion's pro-social effects to individual incentives to politically organize. The predictions of the agent-based model are assessed against my statistical dataset. The study finds where religious institutions devolve decision-making, monitoring, and sanctioning authority to the laity, individuals develop capacities to overcome collective action problems related to political activism. Religious ideology is also found to influence capacities for political activism.

## DEDICATION

To Erica, for inspiring this project

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## Chapter 1

### INTRODUCTION

*Under what conditions do religious organizations facilitate secular political activism?* Religion has played a key role in spurring many secular political movements. Consider the Civil Rights movement in the United States without the influence of the Southern Baptist Church. Islam appears to have prompted all manner of political engagement across the Arab world, and Buddhism has been at the forefront of political activism in regions such as Myanmar and Tibet. The spread of Protestantism has likewise been linked to democratic development (Woodberry 2012). Empirical research in a variety of regional settings points to religious institutions as providing the mobilizing ideological frames, social networks, recruitment, civic skills, and resources necessary for collective action (Putnam and Campbell 2010; Verba, Schlozman and Brady 1995; Trejo 2009, 323; Tarrow 1994, 11; McAdam 1982). Furthermore, religiosity appears to have a positive impact on various measures of democracy, social trust, and political participation (Putnam 1993; Skocpol and Fiorina 1999; Seligson 1999; Norris 2004; Klesner, 2007).

Notwithstanding these findings, religious institutions have sometimes inhibited civic activism. Prior to Vatican II, the Catholic Church was often aligned with conservative and anti-democratic interests, leading Putnam to argue the Catholic Church has had a historically negative impact on civic activism in Italy (Putnam 1993, 107). Muslims have had difficulty organizing politically in Europe (Pfaff and Gill 2006 ), and religious adherents of all stripes are sometimes encouraged to focus on spiritual rewards rather than secular fortunes.

Existing accounts of religion and politics often emphasize either the rational incentives or the ideational inspirations that link religion to political outcomes. However, this literature has not yet provided a convincing micro-level explanation for how mainstream religious institutions enable political activism by the laity. Little agency is given to the individuals at the grassroots who incur the costs of political organization and form the popular base of activist movements.

I present a new theory uncovering the micro-level mechanisms connecting religious institutions to political activism by the laity. I utilize the insight from theories of collective action specifying how institutions structure individual incentives for producing public goods. In doing so, this study forms rationalist micro-level hypotheses detailing religious institutions' impacts on political activism, and it contributes to our understanding of political participation, the relationship between religion and collective action, and the more general relationship between institutional hierarchies and collective action. This dissertation also provides insight into the relationships between political competition and political activism, ethnicity and public goods, and the debate over the role of ideology and interests in explaining secular political activism. Notably, I find little support suggesting ethnic fractionalization impacts political activism.

By political activism, I refer to citizens' interactions with political institutions through protest and associational activity. Associational activity can involve substantial investments of time and money, and protest (whether violent or peaceful) often involves unknown and potentially large costs and benefits (Benson and Rochon 2004). The costs of voting, however, are relatively low. Thus, turnout may shed less light on collective action outcomes than other forms of political participation (Aldrich 1993, 265; Whitely

1995; Bañck et al. 2011). This study accordingly focuses on political activism rather than the broader and more general category of political participation.

Because of the costs involved, political activism constitutes a public good where individuals have an incentive to free-ride off the efforts of others (Olson 1965; Buchanan 1965; Cornes and Sandler 1996; Siroky 2012). Theories of collective action tell us that the provision of public goods is heightened when individuals' actions are monitored and defection is sanctioned. These monitoring and sanctioning functions are performed more efficiently and effectively when performed at a decentralized local level (Hechter 1987, Ostrom 1990; Rydin and Pennington 2000; Agrawal 2001; Coleman and Steed 2009). Previous scholarship has also demonstrated that the structure of religious institutions has the potential to affect political outcomes, notably both by influencing the cost calculations of religious elites and constraining their options (Warner 2000; Warner and Wenner 2006; Pfaff and Gill 2006, Kalyvas 2000).

The primary theoretical contention of this dissertation draws from these insights, suggesting that where local laity hold decentralized monitoring, sanctioning, and decision-making authority in religious institutions, communities have heightened capacities to engage in political activism. At the same time, a number of empirical studies in psychology and behavioral economics suggest some individuals cooperate for altruistic rather than self-interested reasons, and religions contribute to such pro-social behavior (Henrich et al. 2001; Saroglou et al. 2005, 75-76; Pessi 2011; Norenzayan and Shariff 2008). When combined with decentralized religious structures, these religiously-motivated altruistic cooperators are more likely to cooperate with others at critical



junctures, making cooperation a more attractive option for self-interested individuals and thereby providing kindling for sustained cooperative interactions.

Decentralization prompts an evolving process wherein heterogeneous agents slowly engage in reciprocal interactions, provide increasing levels of religious club goods that entice new membership, and form an organizational base that can then be applied to political activism. My theoretical model is accordingly marked by feedback, heterogeneity amongst actors, adaptation, and evolutionary processes. Agent-based modeling (ABM) provides an ideal manner to model the evolution of sustained cooperation resulting from religious decentralization. It can examine the emergence of macro-level phenomena, such as sustained political activism, as it results from the iterated interactions of individuals over time (Miller and Page 2007; Janssen and Ostrom 2006; Goldstone and Janssen 2005). These computer simulations can easily model agents whose individual-specific traits and preferences adapt and change (Epstein 1999; Goldstone and Janssen 2005; Van Der Leeuw 2004, 125; Lansing 2002). Accordingly, it can model how religious institutions structure the interactions of heterogeneous agents, and it can track the evolution of reciprocal interactions and the provision of public goods.

In addition to religious decentralization, this study examines a variety of other factors that might also explain variation in political activism. Chapter 2 details these alternative explanations in fuller detail. Briefly summarized, a variety of literature suggests religion causes political activism through ideas and beliefs. Essentially, variation in religious theology explains variation in politics (Philpott 2007, 511; Hurd 2008; Philpott 2000; Fox and Sandler 2004; Thomas 2005; Mitchell 2007). Other influential

theories suggest that religious competition forces religious elites to lend their institutional resources to the aid of secular political movements (Gill 1998, Trejo 2009).

Furthermore, political party competition may open political opportunities for action. Accordingly, where there are heightened levels of political party competition, individuals should have more space to engage in collective action (Birch 2010; Franklin 2004; Norris 2004; McCann and Domínguez 1998). Also, areas that have been historically marked by a contentious relationship between religious institutions and the state may inhibit opportunities for religious institutions to foster political activism (Fetzer and Soper 2005; Chand 2001, 160). Accounts emphasizing horizontal inequality point to disparities in economic development, suggesting that areas marked by heightened levels of economic hardship should be more likely to promote political engagement (Gurr 1970; Stewart 2000; Besancón 2005; Cederman et al. 2011). Finally, ethnic heterogeneity may also have a negative impact on the provision of public goods. Ethnically homogeneous communities should subsequently be more likely to engage in political activism (Putnam 2007; Alesina, et al. 1999; Fearon and Laitin 1996; Fearon and Laitin 2003; Collier and Hoeffler 2004; Collier et al 2009; Sambanis 2001; Habyarimana et al. 2007; Lyall 2010; Baldwin and Huber 2010; Huber 2011).

Mexico provides an important forum in which to examine this relationship. Because it is a young multi-party democracy with a unique history of church/state relations, it demonstrates substantial sub-national empirical variation in conceptual measures of interest to this study. Mexican citizens tend to be highly religious, and there is variation in levels of political activism across regions of the country. The Mexican Catholic Church, though generally hesitant to voice political opinions, has prompted high

levels of civic activism in specific regions of Mexico along important issues of indigenous rights and electoral mobilization (Trejo 2009; Mattiace 2009; Camp 2008; Chand 2001; Blancarte 2006, 424, 429; Sabet 2008; Olvera 2004, 413).

Furthermore, because Mexico is a relatively advanced and well-developed country within Latin America, it offers a wealth of demographic and socioeconomic data to test the theories elaborated above. There is measureable sub-national variation both in the level of religious decentralization and in measures of the alternative explanations to be tested statistically, as further described in Chapter 4. (IFE 2010; CEMEFI 2010; Trejo 2009).

This dissertation subsequently makes use of both quantitative and qualitative empirical tests. For my quantitative analysis, I use over 13,000 Mexican adults surveyed by the nationally representative National Survey of Political Culture and Citizen Practices (*Encuesta Nacional Sobre Cultura Política y Prácticas Ciudadanas* – ENCUP). The ENCUP provides information on respondents’ protest and associational activities. I combine this data with information from a variety of government and religious sources. Statistical analysis of this data across several tests consistently suggests that religious decentralization by the Catholic Church has a positive impact on political activism in Mexico.

I also use qualitative analysis to examine the processes linking my theoretical explanation to political activism in a controlled comparison of indigenous political activism in Chiapas and Yucatán. Indigenous activism provides a particularly interesting subset of political activism. Within Mexico, indigenous communities are marked by deep poverty. They are often isolated geographically. Prior to the 1970s, they were not

characterized by political engagement (Yashar 2005, 25). In many regions of Mexico, these groups are strongly differentiated by language and custom. Indigenous communities in Mexico would appear unlikely to engage in collective action. However, a vibrant movement of indigenous political activism has emerged, particularly in Chiapas, since the 1970s. Yucatán, on the other hand, is a highly indigenous region of Mexico that is still characterized by little indigenous political activism.

The qualitative investigation of the dissertation accordingly conducts a controlled comparison of indigenous political activism in Chiapas and Yucatán. It also briefly examines the shadow-case of political activism in Morelos. Chiapas and Yucatán have historically developed at the periphery of Mexican national politics. Both are located in southeastern Mexico, have large indigenous populations, and have experienced Protestant evangelization. Because this study utilizes a sub-national comparison, they also share common national governments. Despite these similarities, they are marked by dramatic variation in indigenous political activism.

The results of this controlled comparison demonstrate that the Catholic Church decentralized decision-making, monitoring, and sanctioning to laity in Chiapas, but not in Yucatán. Within Chiapas, decentralized decision-making gave local indigenous laity a forum to formulate solutions to their social and economic problems. The decentralized monitoring and sanctioning of material club goods allowed communities to engage in reciprocal exchange and develop an organizational base enabling political activism. In Yucatán, on the other hand, the absence of Church decentralization meant that communities had no forum in which to discuss local problems, little reciprocal exchange, no organizational network, and subsequently little political activism. Beyond the

framework of the controlled comparison offered by Chiapas and Yucatán, this dissertation also presents a brief “shadow case” examining the relationship between religious decentralization and political activism in Morelos. The inclusion of this non-indigenous case serves to ensure that nothing particular to indigenous communities drives the results of qualitative comparison between Chiapas and Yucatán.

### *Dissertation Organization*

Chapter 2 of this dissertation presents an extended discussion of the theory of religious decentralization. Previous literature examining the relationship between religious institutions and political activism tells us that religious institutions provide critical organizational resources enabling political activism. However, little agency is given to the laity themselves who build their own political organizations and fashion their own political movements, often outside the formal organizational and ideological structures of religious hierarchies.

I develop my own theory stipulating that the decentralization of decision-making, monitoring, and sanctioning by religious institutions to the laity leads to heightened capacities to engage in political activism. Within the theory, a minority of pro-social cooperators play an important role in prompting political activism given religious decentralization, making religious institutions particularly effective at prompting political activism. I then more fully explore the alternative explanations introduced above.

The chapter concludes with a discussion of my research methodology. I present the advantages of ABM for modeling theory. I justify my case selection of Mexico as the empirical setting of this study, briefly introduce my statistical analysis, and conclude with a discussion of my qualitative case comparison of Chiapas, Yucatán, and Morelos. While

statistical analysis helps to establish general relationships, qualitative analysis helps us to understand the mechanisms that link causes to effects.

Chapter 3 presents my agent-based model. The chapter opens with a brief summary of the model before launching into a technical discussion of its behavior. The chapter then describes the simulated experiments designed to examine the relationship between religious decentralization and political activism. The results suggest religious decentralization prompts increasing reciprocal interactions, contributions to club goods, and subsequently the organizational structures that facilitate political activism.

Chapter 4 presents my statistical analysis. I explain the statistical measurement of political activism, decentralization, and the alternative explanations explored by this dissertation. I then provide a discussion of my use of fixed effects logistic regression and fixed effects negative binomial regression to analyze my statistical data. The results of the analysis support the contention that religious decentralization has a positive association with political activism. The results also suggest that religiously committed individuals are more likely to participate in political activism. At the same time, I find little evidence that church/state histories, ethnic heterogeneity, or political party competition impact political activism. Economic hardship and religious ideology, on the other hand, are also supported by the statistical analysis. Religious competition finds weak support.

Chapters 5 and 6 present my controlled qualitative comparison. Chapter 5 examines Chiapas, a state that has been marked by heavy engagement in political activism. I demonstrate that the Catholic Diocese of San Cristóbal de las Casas within Chiapas decentralized monitoring, sanctioning, and decision-making to laity beginning in

the 1960s. Decentralized decision-making enabled laity to select local lay leadership who chose their own themes for discussion during Catholic instruction. Communities accordingly discussed their local problems and formulated solutions to them. Monitoring and sanctioning were facilitated by economic cooperatives created by the Diocese to provide material welfare to parishioners. Once established, the hierarchy granted complete monitoring and sanctioning control over these small local producer groups to the laity.

As these religious clubs grew and provided excludable benefits to members, individuals developed reciprocal bonds within and between local communities. The organizational base that developed as a result directly enabled the political activism that emerged in Chiapas beginning in the 1970s. Religiously committed individuals also played an important role in prompting larger cooperation by providing initial contributions to the religious club goods. These initial contributions in turn made the benefits of the religious club more attractive and prompted further contributions from others.

Chapter 6 presents Yucatán, a state marked by little political activism. I show that the Catholic Archdiocese of Yucatán is highly centralized. The laity have few substantive decision-making opportunities, and the Archdiocese has not provided similarly decentralized monitoring and sanctioning opportunities in the management of religious material club goods that it has through cooperatives in Chiapas. Reciprocal interactions have not grown within or between communities, and there are few independent organizations to facilitate political activism.

The qualitative investigation has important implications for the alternative theories that might also explain political activism. I find that ideology is insufficient to prompt political activism if it is not accompanied by religious decentralization. I also find that religious competition fails to explain variation in political activism between Chiapas and Yucatán. Furthermore, rather than prompting political activism, political party competition in many cases created negative incentives for individuals to participate. Economic hardship may create demand for political activism, but it is insufficient to spur it. Historical relations between the church and the state explain little of the variation in political activism between Chiapas and Yucatán. Finally, the results of this study have important ramifications for a large body of literature that suggests ethnic fractionalization is linked to the under-provision of public goods. Chiapas, which is marked by high degrees of ethnic fractionalization, experienced sustained political activism across a wide variety of indigenous communities. The relatively homogeneous indigenous communities of Yucatán, on the other hand, did not.

Chapter 7 examines the relationship between religious decentralization and political activism in the non-indigenous setting of Morelos. Morelos has been characterized by a great deal of political activism. The Catholic Diocese of Cuernavaca has played a pivotal role in prompting this activism by decentralizing decision-making authority to laity through Christian base communities. These Christian base communities also served to grant monitoring and sanctioning capacities to laity in a similar manner as Chiapas through cooperatives and neighborhood economic support groups. The Christian base communities subsequently served as the organizational basis of powerful activist movements in Morelos. Finally, Chapter 8 restates the theoretical contribution of this



dissertation and summarizes its results. It then states the implications of this study and suggests future avenues of research. This dissertation now turns to a discussion of the theory of religious decentralization and the methods used to assess the relationship between religion and political activism in Mexico.

## Chapter 2

### THEORY AND METHODS

As suggested in the introductory chapter of this dissertation, religious institutions have had a historically important role in prompting political activism across a variety of empirical settings. Existing literature examining the relationship between religion and political activism suggests that religious institutions often provide the ideological frames, social networks, and institutional resources that support collective action. Yet previous analyses of religion and political participation have not assessed mainstream religious institutions' micro-level influences on lay political activism. Little agency has been given to the laity themselves who incur the costs of political mobilization. We are left with a vague understanding that religion somehow facilitates collective action, but we lack a more precise sense of when it can be expected to do so.

This dissertation provides insight into a central empirical and theoretical puzzle. *Why do religious organizations facilitate secular political participation in some settings and not others?* This chapter elaborates my theoretical response to this question. I argue that where religious institutions devolve decision-making, monitoring, and sanctioning authority to the laity, individuals develop capacities to overcome collective action problems related to political activism. This chapter also establishes my methodological approach to examining the question. I triangulate the advantages of agent-based modeling, quantitative statistical analysis, and comparative qualitative case studies within the empirical setting of Mexico.

I begin this chapter with a discussion of key concepts and definitions. I then review the literature assessing the relationship between religion and collective action. I

argue that this literature can best be categorized into three broad classes. The first class views religion from a resource mobilization perspective, suggesting that religions often provide the material resources and ideological mobilizing frames facilitating collective action. The second class contends that religion facilitates collective action through its ideological appeals. The third takes a rational interest-based perspective. I argue that these perspectives are inadequate to understand religion's impact on political activism. They either fail to test key propositions, cannot explain spatial patterns of political participation, or do not develop convincing micro-level explanations for why religion prompts lay political activism.

Following this discussion, I outline my own theoretical alternative. I argue that where religious institutions are characterized by decentralized decision-making, monitoring, and sanctioning at the local lay level, communities are marked by increased capacities to engage in political activism. Following this discussion, I examine the relative merits of agent-based modeling, quantitative analysis, and qualitative historical analysis. I follow with a justification for centering the empirical examination of this dissertation within Mexico while also presenting my criteria for selecting the cases for my qualitative comparison.

### *Political Activism, Political Participation, and Religious Institutions*

Before beginning, a key distinction must be made between political participation and political activism. *Political participation* is characterized by citizens' interactions with political institutions through voting, associational activity, and protest (Putnam 1995; Klesner 2009). Participation includes political activities individuals engage in both individually (voting) and collectively (such as membership in political organizations and

political protest). It also includes both high and low cost political behavior. I conceptualize *political activism*, on the other hand, as collective and high-cost political behavior (such as protest and associational membership). Political activism is therefore a subset of political participation, but one that does not include individual and relatively low-cost activities such as voting. Theories of collective action emphasize the costs of political activism to be overcome to produce public goods. They presumably explain collective and high cost political activism better than individual and relatively low-cost voting behavior.

Also, this study investigates secular political activism rather than political activism oriented around religious goals. It is not difficult to understand why religiously-committed individuals would organize around religiously-related policies or to oppose political policies they find morally corrupt. Secular political activism, on the other hand, involves issues not traditionally associated with religious dogma, such as demands for democratization or social rights. Furthermore, this study conceptualizes religious institutions as the collective interests of institutional hierarchies and laity (Camp 1997, 18). The hierarchy consists of individuals who make organizational and doctrinal decisions. The laity, on the other hand, receive doctrinal instruction, though these categories may not always be mutually exclusive.

#### *Religion, Resource Mobilization, Ideology, and Interests*

A variety of literature has investigated the relationship between religious institutions and political activism. The approaches used by previous scholarship can be classified among three broad categories of explanation, including resource mobilization, ideology, and rational interest-based theories of religion and political behavior. Each of

these approaches suffer from problems. Accordingly, we still lack a clear understanding of why mainstream religious organizations prompt political activism among the laity in some areas, but not in others.

Many studies have examined individual-level variables in an attempt to explain political engagement, and religiosity is consistently found to have an effect on individual political participation across a variety of empirical settings (Putnam 2000; Putnam and Campbell 2010; Skocpol and Fiorina 1999; Seligson 1999; Krishna 2002; Norris 2002; Klesner, 2007). Putnam and Campbell and Skocpol and Fiorina have uncovered this positive association in the United States. Klesner and Seligson report similar findings in Latin America. Norris's large-N cross-national analysis found that religiosity is an important determinant of political participation across a variety of the world's regions. While these studies helpfully demonstrate the existence of a broad relationship between religiosity and political behavior, they do not help us understand when religious institutions can be expected to support political activism.

In an attempt to explain how religious institutions often seem to facilitate political activism, theories of resource mobilization suggest that religions produce cultural capital, ideological frames, social networks, and institutional resources that support collective action (Dhingra and Becker 2001; Putnam 2000; Loveland, et al. 2005; Caputo 2009; Verba, Schlozman and Brady 1995; Trejo 2009, 323; Tarrow 1994, 11; Morris 1981; McAam 1982; Calhoun-Brown 2000; Harris 1999; Wickham 1997; Wiktorowicz 2004). As an exemplar of this type of theory, Deborah Yashar argues that trans-community networks were a necessary condition for the emergence of indigenous political activism

across Latin America. Unions, churches, NGO's, and state organizations often unintentionally provided organizational structures necessary to support collective action.

Yashar finds that churches helped to build rural networks between communities in Guatemala, Ecuador, Bolivia, and Mexico. "Churches often provided the means of communication, the locus of interaction, and literacy skills that linked one community to another. So too, church leaders inspired by liberation theology created [Christian base communities] that encouraged activism ... Bishop Samuel Ruiz, for example, organized indigenous fora, brought resources to indigenous communities, and encouraged more active forms of localized organizing" (Yashar 2005, 74). Yashar argues that in Chiapas liberation theology provided an ideological framework that unified a plan of action within individual dioceses and across the region. Religion also brought institutional resources as Bishop Samuel Ruiz provided training and financial resources to indigenous communities.

A problem with this theory generally and as applied to the Chiapan case is that little agency is given to the rank and file laity who do the work of mobilizing politically. Because the Bishop in Chiapas wanted the people to organize, they were able to do so. As the next section discussing the theoretical and empirical challenges to ideological perspectives also points out, there are many examples of progressive Catholic bishops who wanted to encourage political activism within their dioceses, but they were unsuccessful. Because this literature examines structural factors and group resources, how religious institutions encourage collective action at a micro-level is not well-understood (Lichbach 1998, 347). Furthermore, Yashar's work, like much of this literature, makes little attempt to test religion's role in prompting resource mobilization

against cases where religious organizations have not prompted such behavior.<sup>2</sup> We are left with a vague sense that religious institutions play an important role in facilitating civic engagement, but we lack a well-specified and convincing micro-level theory explaining how and when.

### *Ideology*

Some accounts of religion's impact on political activism have examined the impact of ideology and argued that variation in religious beliefs influences political engagement. Religious actors are thought to understand and define their political options through their beliefs (Philpott 2007, 511; Hurd 2008; Philpott 2000; Fox and Sandler 2004; Thomas 2005; Mitchell 2007). In this way, ideology influences political behavior. As an example, Daniel Philpott has recently argued that ideology holds explanatory primacy in understanding why some religious institutions support democratization while others support political violence.

While Philpott takes institutional configurations seriously, he argues that the Catholic third wave of democratization between 1974 and 1990 in Latin America was largely the result of a theological reorientation within the Church. He argues that where progressive thinking became entrenched among lay activists and bishops, the Church was most likely to advocate for democracy. Progressive thinking, particularly through liberation theology, was common in parts of Latin America where the Church embraced a preferential option for the poor.

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<sup>2</sup> It should be noted that Yashar's primary independent variable of interest involves the role of corporatism, not religion. Yashar does, however, posit that the pre-existence of social networks often facilitated by religious institutions are necessary to enable indigenous activism.

Philpott states “variations in ideas then explain variations in politics. It was those Catholic churches where this new political theology took root deepest, widest, and earliest that came to support democracy most vigorously” (Philpott 2007, 511). He suggests that the national churches that never resisted authoritarian regimes were those that were relatively uninfluenced by liberation theology. In countries such as Argentina and Uruguay, “neither liberal democratic political theology nor liberation theology took root among the laity and clergy anywhere nearly as deeply as they did in Brazil, Chile, and elsewhere ... These churches, because of their ideas and their institutions, stood on the sidelines of the Catholic Wave” (Philpott 2007, 512).

There are several problems with this framework. The argument has the potential to slip into tautology. Where Catholicism failed to embrace liberation theology, the Church did not advocate for democratic reform. However, how does one identify the widespread acceptance of liberation theology *a priori* without identifying whether or not the Church and its laity challenged political authority? Furthermore, Philpott cites Argentina as a case where liberation theology failed to take hold within the Church, but in reality a significant minority of Catholics worked to protest authoritarian abuses during the Dirty War (Klaiber 1998, 90). Why would liberation theology have taken root among some laity and not others, and why would it have affected the laity but not the hierarchy?

The explanation encounters further empirical challenges. Within the United States, it does not appear that religious ideology drives individual propensities toward political activism. Instead, it is membership in church groups and organizations (Putnam and Campbell 2010; Djupe and Gilbert 2009). Furthermore, the existence of a progressive ideology is not sufficient to compel political activism, even when it is encouraged by the



hierarchy. In the 1970s, progressive bishops in the Mexican diocese of Chihuahua attempted to promote liberation theology in northern Mexico. However, the people did not respond to it (Chand 2001, 191). The problem for the Church in Chihuahua was that it attempted to force its own agenda onto the laity. Once the Church gave more autonomy to laity in the 1980s, it had success in prompting political activism around electoral reform. In the 1970s, “the issue of social justice was artificially imposed on society by the Church and a relatively narrow group of social activists ... Instead of attempting to promote its own goals, the Church in the 1980s chose to respond to society’s autonomously determined agenda” (Chand 2001, 191).

### *Rational Explanations*

Rational explanations offer an intriguing alternative for assessing the relationship between religious organizations and political activism. Deductive theoretical models have been developed to study religiously-motivated terrorist organizations. Many explain terrorist violence as a result of organizational interests, with some suggesting theology is rarely the primary cause of terrorism (Pape 2003; Pape 2005; Hoffman and McCormick 2004; Pedahzur 2005; Caplan 2006; Bloom 2007). Others draw on economic theories of clubs to suggest the extreme sacrifice requirements of strict sects provide symbols of credible commitment, making them highly effective providers of club goods and, in turn, terrorists. Strict requirements weed out defectors, ensuring the individuals who remain are highly committed and willing to engage in terrorist activities (Buchanan 1965; Olson 1965; Cornes and Sandler 1996; Kaul et al. 1999; Chamlee-Wright and Storr 2009; Iannaccone 1992; McBride 2007; Iannaccone and Berman 2006; Berman and Laitin 2008; Berman 2009).

Certainly terrorist acts are inherently political, and terrorism is an important form of political activism. Yet, because this perspective stresses religious insularity and extreme sacrifice requirements, it has difficulty explaining how mainstream religious institutions, whose requirements are much less extreme, also promote political activism (Makowsky 2011). The perspective has difficulty explaining why a mainstream institution with few strictly enforced doctrinal requirements such as the Catholic Church was able to spark demonstrations against authoritarian rule across Latin America and Europe. The political activity of sects is over-predicted while the potential of large religious institutions to mobilize political activism is under-predicted. Strict evangelical sects in Mexico, for example, have not been politicized. Instead, it has been the Catholic Church that has prompted collective action in several regions.

Other rational explanations of religious behavior emphasize organizational interests over ideological factors and focus on the incentives of religious elites (Gill 1998; Kalyvas 2000; Warner 2000; Gill 2001; Bellin 2008; Trejo 2009). Several theorists suggest religious competition forces religious elites to be more attuned to the social needs of their laity. These elites then shift the institutional support of the religion to a particular social cause, prompting collective action (Gill 1998; Trejo 2009). Guillermo Trejo has applied this argument to indigenous protest in southern Mexico. He asks why some bishops and priests promoted the development of indigenous organizations in some regions while others did not.

Trejo contends that so long as religious competition was limited, the Church could content itself with serving elites in society, thereby nurturing its own financial and institutional position. However, the introduction of Protestant religious competition in

some regions empowered non-elite parishioners by giving them an exit option. If they were not well-served by the Church, they could leave for an alternative religion. The Church could no longer take the support of its parishioners for granted, and it was forced to reinterpret its doctrine and scriptures to accommodate them. However, the Church faced a reputation deficit for having sided with political and economic elites over several centuries. “Siding with poor rural indigenous movements demanding a radical transformation of rural economic structures, even in the event of state repression or a violent reaction by the rich, would be a powerful and credible signal of a long-term Catholic commitment to the material well-being of poor parishioners” (Trejo 2009, 328). In essence, Protestant competition compelled religious clergy to be more concerned over the preferences of their less-advantaged constituents. In order to demonstrate their commitment to these preferences, they sponsored and nurtured political movements to enable parishioners to advocate for material redistribution from the state.<sup>3</sup>

The argument is attractive and presents a plausible explanation for why religious elites would be interested, from an interest-based perspective, in supporting the political goals of parishioners. However, it does little to explain why parishioners themselves would go to the trouble to politically organize given the extensive costs of political activism. An assumption is made that religious leadership naturally enables activism amongst the laity. Even if the Church subsidized some of the costs of collective action by

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<sup>3</sup> Shami (2012) provides an interesting line of theory that supports the religious competition argument. Shami suggests that even among very horizontal patron-client relationships (such as one might argue characterize the relationship between Catholic clergy and their parishioners), collective action emerged when the peasant clients were able to choose from multiple patrons or had an exit option. Just as Trejo argues the Catholic Church assisted indigenous collective action when faced with the prospect of exiting parishioners, Shami finds that local resource-rich patrons in Pakistan under similar circumstances “not only refrained from blocking peasants’ collective action but actually went as far as to assist them in such activities” (Shami 2012, 589).

offering forums for meeting and by channeling resources for civic activism, the perspective cannot explain how the Church overcame incentives for parishioners to free-ride. Why did laity organize themselves and push for political reform rather than sitting back and allowing the Catholic Church to do it for them? The theory explains the incentives of religious elites to allow space for religion to be used as a vehicle for collective action, but it does not provide a convincing micro-level explanation for how religion facilitates collective action by the people. Once again, little agency is given to the individuals engaging in political participation.

#### *A Theory of Religious Decentralization and Political Activism*

In developing my own micro-level theory accounting for the impact of religious institutions on the development of political activism, I take insights from both rational and ideological approaches to the study of religion and politics seriously. On one hand, it is nearly undeniable that belief plays an important role in explaining religion's influence on political activism. On the other hand, political activism is a costly activity, and a convincing theory must also assess how religious institutions overcome incentives to free-ride.

I suggest religious institutions play an important role in shaping the nature of lay interactions. I assume that the majority of individuals within religious institutions seek to maximize their personal utility, and their options are constrained and channeled by institutional structures and incentives. At the same time, I draw on research in behavioral economics and psychology that has demonstrated that preference mechanisms are heterogeneous. This is to say that while a majority of individuals may act out of self-interest, a minority of individuals act out of altruistic considerations. Religion has been

demonstrated to positively affect these altruistic considerations, as cited below. Given decentralized institutional configurations, these pro-social cooperators provide kindling for promoting sustained cooperation among the larger religious population.

The interdisciplinary literature on cooperation and collective action provides a promising avenue to link institutional configurations to grass-roots level collective action and political outcomes (Bermeo 2010; Keohane 2010; Levi 2010; Mansbridge 2010; Baumgartner 2010). Much work has assessed cooperation under the prisoner's dilemma and the conditions that foster sustained cooperation (Axelrod 1984; Whitley 1995, 213-214; Nettle and Dunbar 1997; Nowak and Sigmund 1998; Brandt et al 2003; Nowak and Sigmund 2005; Janssen 2008). Research in collective action, drawing from these insights, emphasizes how the "tragedy of the commons" is overcome by institutional arrangements allowing for local level governance. Where centralized states manage local common pool resources without granting a role in decision-making, monitoring, or sanctioning of the use of those resources to local actors, collective action is generally thwarted and the management of the resource fails. Individuals at the local level assume the center will manage planning of the resource for them, and they free-ride off these efforts. Individuals have little expectation that others will cooperate rather than defect, and subsequently the dominant strategy is to withdraw and avoid interacting with others (Ostrom 1990; Rydin and Pennington 2000; Agrawal 2001; Coleman and Steed 2009; Andersson, et al. 2010; Scott 2009; Orbell and Dawes 1993; Hauk and Nagel 2001; Janssen 2008).

In local governance, the responsibility for decision-making is placed on the users of the resource themselves in small groups that potentially monitor and sanction others. Decision-making allows local communities to assess their local challenges and formulate

their own solutions to meet them. Monitoring allows for the diffusion of information regarding past interactions to group members. Cooperative behavior can be reciprocated while non-cooperators can be avoided (Ostrom 2007, 200-201). This allows for the development of generalized reciprocity wherein individuals are reasonably confident that others will cooperate in future interactions and that their own cooperation will not be exploited by others (Putnam 1993, 172). While previous scholarship has used the term “trust” to describe a similar phenomenon, the term is loaded with normative and moral value judgments that make it difficult to pin down conceptually (Ciriolo 2007; Nannestad 2008, 418). Accordingly, I use the phrase “anticipated reciprocity” to refer to the general confidence of individuals that others in the community will cooperate rather than defect.

Groups develop the capacity to apply meaningful sanctions as they become more efficacious in producing desired material club goods, and defectors are punished through exclusion from those goods. Individuals engage in increasingly cooperative interactions as they learn who will reciprocate, and reciprocal interactions throughout the community grow. Communities can then address complex public goods problems as the costs of building a local organizational base and the exclusionary mechanisms of control at the “club” level have already been established (Hechter 1987, 123; Rydin and Pennington 2000, 161-162).

I extend this logic to religious institutions. The structure of religious institutions has the potential to affect political outcomes (Warner 2000; Warner and Wenner 2006; Pfaff and Gill 2006; Kalyvas 2000). They are nearly ubiquitous across human societies. They accordingly have the potential to play a powerful role in shaping the interactions of individuals at a local level. I contend that where religious institutions decentralize

monitoring, sanctioning, and decision-making authority to members, churchgoers have heightened access to information regarding the cooperative behavior of their fellow laity. Members subsequently engage in higher levels of reciprocal interactions with others and engage in higher levels of religious club activity. Group members accordingly have the club exclusionary sanctioning mechanisms in place to encourage the production of non-excludable public goods such as political activism.

Political activism subsequently develops as an externality resulting from religious decentralization. Through decentralization, religious elites either intentionally or unintentionally create an organizational base that facilitates political activism. In a previous study examining the origins of European Christian Democracy, Stathis Kalyvas found that the Catholic Church had difficulty controlling the political activity of laity once mobilized (Kalyvas 1996). I anticipate a similar effect for decentralization. Religious clergy unleash organizing potential among the laity that cannot be controlled.

Decision-making encompasses the ability of the laity to set the agenda for the direction of the religious institution. Monitoring encompasses the responsibility individuals have in ensuring other members of the community reciprocate cooperative behavior. Sanctioning involves the application of punishment on defectors, generally manifested by exclusion from material club benefits.

Religious club goods are likely to consist of “a variety of spiritual, social, emotional, and material benefits” including sacraments, existential assurances of salvation, social gatherings, sick visits, and social services (McBride 2007, 405-406). Spiritual contributions to religious club goods are difficult to monitor and efforts to do so can undermine group cohesion (Iannaccone 1994, 1186). Furthermore, many religions are

unlikely to decentralize key spiritual sanctioning mechanisms such as permanent exclusion from the religious organization. On the other hand, material club goods produced by laity are prime candidates for exclusion. Material contributions by individuals can be easily monitored, and material rewards can also be withheld from non-contributing laity. This dissertation accordingly conceptualizes sanctioning as the exclusion of material religious club goods.

As alluded to in the introduction, the theory applies more usefully to higher-cost political activism than lower-cost forms of political participation such as voting. The costs of political participation are not constant. Associational activity often entails substantial investments of time and money. Protest, particularly in non-democratic regimes, has the potential to be quite costly (Benson and Rochon 2004). Voting, on the other hand, has relatively low costs. Thus, theories of collective action may be more successful in explaining political activism as a substantial number of variables impact voting behavior (Aldrich 1993, 265; Whitely 1995). Recent research has further demonstrated that selective incentives prompting protest may be less effective in encouraging voting, and vice versa (Bäck et al. 2011). As such, I expect to see that the nature of religious institutional centralization has a stronger impact on associational and protest activity than on voting behavior. The foregoing discussion leads to Hypothesis 1 of this dissertation:

*Hypothesis 1:*

- a) *Religious decentralization is associated with heightened engagement in associational and protest activity.*



- b) *Decentralization increases reciprocal interaction and engagement in the production of religious club goods.*
- c) *Voting activity is least likely to be affected by religious decentralization.*

The other important micro-level consideration involves the role of belief. To model such ideological imperatives, I draw on experimental findings concerning the relationship between religion and altruism. Several studies suggest a segment of the population make decisions through altruistic considerations rather than through strict cost/benefit rationality. There is accordingly heterogeneity in social preferences (Henrich et al. 2001; Andreoni 1990; Bowles and Gintis 2004; Charness and Rabin 2002; Simpson and Willer 2008). Henrich et al., for example, demonstrate through the ultimatum game that respondents care about fairness, reciprocity, and are often willing to incur personal costs in order to secure these outcomes. Religion, with its emphasis on morality and charity, contributes to such pro-social behavior in committed adherents (Saroglou et al 2005; Pessi 2011; Norenzayan and Shariff 2008). Empirical studies demonstrate that religion positively impacts altruistic tendencies either to avoid guilt or to project a pro-social image. Whatever the motive, the relationship has been demonstrated across a variety of experimental settings, and religiously-committed individuals also tend to engender confidence from others (Norenzayan and Shariff 2008, 59-60).

Some individuals, therefore, are more likely to cooperate in their interactions with others due to religion's ability to prompt pro-social behavior. When combined with decentralized monitoring, sanctioning, and decision-making, these individuals can play an important role in prompting political activism. They cooperate at critical junctures when the development of sustained cooperation is tenuous and uncertain. In doing so,

they increase the level of confidence in the general population that others can be expected to cooperate rather than defect. In addition to the institutional incentives to interact and cooperate resulting from decentralization, these pro-social cooperators enhance the value of religious club goods and increase the incentive for the self-interested majority of religious membership to participate and cooperate. This leads to Hypothesis 2:

*Hypothesis 2:*

- a) *Highly religiously committed individuals should participate in higher levels of political activism than the rest of the population.*
- b) *Highly religiously committed individuals should help elicit cooperation from others in decentralized environments.*

An important scope condition is that the theory applies most usefully to religions with many adherents. While small religious sects are often characterized by decentralized governance, small and isolated groups of individuals lacking a means to network beyond their own localities are unlikely to marshal the resources necessary to prompt political activism.

The theory also does not attempt to explain the particular secular issues advocated by religiously-motivated political activism. Instead, the theory makes a simplifying assumption that there is some unspecified political issue or issues(s) whose resolution is of mutually beneficial interest to a subset of the religious group. Political information individuals receive from social networks in their congregations, political cues given by clergy, the status of the religious group in society at-large, and individuals' own personal attributes affect the direction of political activism (Djupe and Gilbert 2009). These

factors are likely to display a great deal of geographic variation, and my theory speaks of political activism without reference to specific issues.

Finally, a word is necessary on this study's conceptualization of political activism as a public good. The political goal of a particular group may not be desired by the entire population. What one portion of society views as a public good may be viewed as a public detriment to another. Consider activism seeking to effect regime change as an example. Such activism is sure to be contentious. Some sectors of society might benefit from this change, but other sectors would certainly stand to lose. Doubtlessly, potential losers would not label political activism as a public good in these circumstances. Despite these considerations, political activism benefits at least a subset of individuals in society, and those individuals still have incentives to free-ride off the efforts of others. Political activism therefore is a public good to this subset desirous of regime change. If anything, the presence of committed opposition further increases the costs of activism and incentives to free-ride.

#### *Alternative Explanations*

In addition to testing the impact of religious decentralization on propensities to engage in political activism, this study will also test a variety of alternative explanations that could potentially explain or influence the relationship between religious institutions and political activism. I have already outlined two of these alternative explanations in the preceding review of the literature: religious competition and religious ideology.

Additional alternative explanations include political party competition, the impact of church/state historical development, relative deprivation, and ethnic heterogeneity.

### *Political Party Competition*

Within Mexico, increased political party competition during the 1980s and 1990s may have opened political opportunities for action (Kitschelt 1986; McAdam 1982; Tarrow 1994; Fearon and Laitin 2003). The PRI political party governed Mexico under a single-party system for fifty years, but the situation began to change in the 1980s. Political competition may have heightened interest in political participation as Mexican voters increasingly perceived they had a legitimate choice (Birch 2010; Franklin 2004; Norris 2004; McCann and Domínguez 1998).

Furthermore, Anthony Gill has recently made the argument that political competition improves the bargaining power of religious institutions vis-à-vis the state. As he applies his argument to Mexico, the Church became more willing and capable of advocating on behalf of its interests as the PRI sought support to fend off challenges from political rivals. “To the degree that the PRI’s rivals gained in strength, the Church gained political leverage” (Gill 2008, 159). Presumably, political party competition increases Mexican political participation as Church leadership, to heighten its negotiating position, actively encourages the political participation of its laity. Third, there is the popular perception of a strong link between the PAN party and the Church. It is possible this could influence political participation in regions demonstrating higher levels of PAN political strength, though scholars generally downplay a Church/PAN link (Camp 1997; Loaeza 2003; Camp 2007; Camp 2008; Blancarte 2006; Mizrahi 2003; Magaloni and Moreno 2003; Domínguez and McCann 1995). All of these perspectives, however, suggest political party competition should be associated with heightened levels of political activism.

## *History*

It is also possible that the historically contentious relationship between the Church and the Mexican state may have a differential impact on the Catholic Church's ability to prompt political activism across Mexico. History affects religious groups' opportunities to represent their interests to the state. For example, Muslim cultural and religious practices have been generally accommodated in the United Kingdom, but their public expression has been highly contested in France. It has been argued that variation in this accommodation is the result of differences in how these nations have historically resolved confrontations between church and state (Fetzer and Soper 2005).

Within Mexico, the relationship between the Mexican Catholic Church and liberal democratic reformers has been characterized by conflict. Following the Mexican Revolution, liberal reformers enacted a variety of anti-clerical measures to curtail the power of the Church. By the 1926 passage of the Calles Law, priests were not permitted to support political parties or criticize the government, religious orders were closed, primary education was secularized, and all foreign priests were deported from Mexico. Religious clergy were required to register with the government (Wilkie 1966, 222). In response, the hierarchy suspended religious services. Rural peasants, already aggrieved by agrarian crises resulting from the Mexican Revolution, rebelled throughout the countryside in central and western Mexico.

This insurrection, which became known as the *Cristero* War, lasted three years and involved more than 25,000 combatants before a *modus vivendi* was finally negotiated between the Church and the Mexican state (Jrade 1985; Blancarte 2006, 426; Chand 2001, 153). While dioceses in central Mexico have been wary of disrupting the uneasy

truce with the state, dioceses in peripheral regions, such the northern and southern regions of Mexico, are argued to have had more space to act politically and encourage political activism by their laity (Chand 2001, 160-162).

### *Relative Deprivation*

Relative deprivation has long been conjectured to explain political activism as individuals become frustrated by their economic status and seek to change it (Gurr 1970). More recent literature assessing the impacts of horizontal inequality has revived the case for relative deprivation by demonstrating an empirical relationship between inequality and insurgency (Cederman et al. 2011; Stewart 2000; Besançon 2005). At the same time, the implications of relative deprivation need not only be confined to insurgent violence. Horizontal inequality raises the demand for social change generally and produces not only violent insurgent activities, but also protest and collective organizing. The argument has been challenged, however, as scholarship has suggested that economic hardship is insufficient to prompt collective action (Olson 1965; Fearon and Laitin 2003; Collier and Hoeffler 2004).

### *Ethnic Heterogeneity*

Finally, a vibrant body of literature provides mixed but generally supportive evidence suggesting ethnic fractionalization has a negative effect on the production of public goods through a variety of mechanisms (Putnam 2007; Alesina, et al. 1999; Fearon and Laitin 1996; Fearon and Laitin 2003; Collier and Hoeffler 2004; Collier et al 2009; Sambanis 2001; Habyarimana et al. 2007; Lyall 2010; Baldwin and Huber 2010; Huber 2011). The “preferences” mechanism suggests co-ethnics are more likely to produce public goods because they share common tastes and have higher other-regarding

preferences for each other. The “technology” and “strategy selection” mechanisms suggest cooperation is heightened when individuals share the same language and cultural heritage. They can subsequently locate and punish defectors. They may also interact differently with out-group members (Habyarimana et al. 2007). Whatever the mechanism, these theories suggest ethnically fractionalized communities are less likely to produce public goods.

### *Methods*

I now continue with a discussion of the methods employed by this study to ascertain why religious institutions prompt secular political activism in some settings, but not others. I utilize a multi-method research design that triangulates the comparative advantages of agent-based modeling, statistical analysis, and qualitative case studies. Agent-based modeling allows me to model the social complexity that is implied by my theory of religious decentralization. The simulated empirical predictions emerging from the computer model are subsequently assessed against both qualitative and quantitative evidence. Statistical analysis maintains a comparative advantage in testing for the existence of a general relationship between religious decentralization and political activism, while qualitative analysis maintains a comparative advantage in explicating the causal mechanisms linking independent variables to dependent outcomes.

### *Agent-Based Modeling*

The theoretical model of religious decentralization I have elaborated above is marked by propensities for feedback, heterogeneity amongst actors, and adaptation. With decentralization, individuals (or agents as I refer to them in the parlance of agent based modeling) located in small local communities can monitor and sanction other community

members more efficiently than a large and centralized institution. The result is the gradual evolution of cooperation as individuals adapt and slowly learn to expect cooperation from others. Feedback is critical as “reputations for being trustworthy, levels of trust, and reciprocity are positively reinforcing ... [while] a decrease in any one of these can generate a downward cascade leading to little or no cooperation” (Ostrom 2007, 200). As stipulated, my theory does not assume all agents share homogenous social preferences. While most agents seek to enhance their own self-interest, a minority are characterized by pro-social preferences. Because of this complexity, an agent-based computer model is the ideal manner to model the theory.

Agent-based modeling has considerable methodological advantages when assessed against traditional mathematical formal models. It can examine the emergence of social structures from the decisions of individual virtual agents relying on simple decision rules (Janssen and Ostrom 2006; Goldstone and Janssen 2005). These agents possess their own heterogeneous strategies and traits and adapt and change over time (Epstein 1999; Goldstone and Janssen 2005; Van Der Leeuw 2004; 125; Lansing 2002). The method allows the researcher to engage in controlled computational experiments through simulation (Axelrod 2006; Grimm, et al. 2005). Any system-level behavior that emerges and sustains itself is the direct result of interactions at the micro-level (Miller and Page 2007), and agent-based models can assess positive and negative feedback in the system (Goldstone and Janssen 2005). Agent-based modeling furthermore has a distinguished history of examining the determinants of cooperation and indirect reciprocity (Axelrod 1984; Nettle and Dunbar 1997; Nowak and Sigmund 2005; Janssen 2008).



At the same time, there may be methodological disadvantages associated with agent-based modeling. The most common critique of the approach is that it is not as “sound” as traditional mathematical formal modeling. Agent-based models “do not prove anything ... they do not offer a compact set of equations – together with their inevitable algebraic solution – which can easily be interpreted and generalized” (Leombruni and Richiardi 2005, 105).<sup>4</sup> In reality, simulations employ well-defined functions which “unambiguously define the macro-dynamics of the system” (Leombruni and Richiardi 2005, 105). In essence, the behavior of all agents within the system and the resultant emergent system-level behavior is the result of precise mathematical functions.

Another critique is that the results obtained from computations are merely reflections of how the computer program is designed to operate. Nothing novel can therefore be learned. While it is true that the program’s output is an extension of the programming language used to create the model, frameworks for emergence such as adaptation, reproduction, mutation, and feedback give the model the potential to create novel insights. Much like formal mathematical models, empirical testing is necessary to substantiate the predicted behavior of the model.

Additionally, the charge is made against agent-based models that they only abstractly represent the world. However, good social science theories are abstractions of specific phenomena and generalizable to other domains. This is a strength, not a liability, of agent-based modeling. Finally, some suggest that it is difficult to empirically test the

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<sup>4</sup> It should be noted that Leombruni and Richiardi (as well as Miller and Page) write in defense of agent-based modeling. It is difficult to find formally published critiques of the approach. As the scholars note, “it is not necessary to justify [skepticism] toward a new methodology: it is sufficient simply to ignore it. Consequently, there are no discussions on the side of traditional economics about the perceived limitations of ABM” (Leombruni and Richiardi 2005, 104).

implications of agent-based models. Yet agent-based modeling allows for simulated experiments that produce quantified and clear empirical predictions. Running these simulations many times provides a particular distribution of outcomes that potentially vary with experimental manipulation. If the simulated patterns emerging from the model do not hold in empirical reality, the model has been refuted (Miller and Page 2007).

Briefly described, my agent-based model reproduces a group of agents, some of whom are members of the religious organization, others of whom are not. The model randomly draws agents to interact in either club or public goods interactions. The level of decentralization of the religious institution influences the cost/benefit decisions of the laity as they assess the probability of being caught and the severity of sanctioning. A minority of agents is influenced by religion's pro-social effect and cooperates unconditionally. These individual interactions are repeated hundreds of thousands of times in order to assess the impact of religious decentralization on political activism through simulated experiments.

### *Empirical Tests*

My multi-method research design also leverages the strengths of qualitative and quantitative analysis (Gerring 2007). In this section, I justify the selection of Mexico as the empirical setting for this study. I then briefly introduce the statistical analysis of Mexican survey data performed in Chapter 4. I continue by describing my qualitative analysis in which I contrast indigenous activism in the Dioceses of San Cristóbal de las Casas in the Mexican State of Chiapas and the Archdiocese of Yucatán in Yucatán. Political activism is also examined in the Mexican State of Morelos in order to expand the theoretical scope of the qualitative study beyond indigenous activism.

## *Mexico*

This study examines political activism in Mexico. Latin America generally makes a fascinating region for analysis of the relationship between religion and politics. The Church has an extraordinary cultural influence, providing a relatively common and core religious theology in a region Anthony Gill describes as a “unique historical laboratory from which to pursue rigorous social-scientific research” (Gill 1998, 3). This universality controls for a variety of potentially confounding religious variables. At the same time, there is variance within the Catholic Church as to how individual Church administrative units (dioceses) are governed. Despite the common conception that the Vatican has authority over the every-day activities of the Church, Mexican bishops have a great deal of autonomy to govern their individual dioceses as they see fit (Camp 1997, 262). Subsequently, there is variation of the management structure of individual Catholic dioceses.

Mexico, more specifically, offers a data-rich opportunity to examine the relationship between religion and political activism. It demonstrates sub-national variation in all dependent and independent variables of interest to this study. Levels of voting, associational activity, and protest each vary across the country (IFE 2010; CEMEFI 2010; Trejo 2009). While many of Mexico’s 90 dioceses are governed authoritatively, others are governed in a decentralized manner (Camp 1997, 276). Mexico subsequently exhibits variation in the centralization of the Church. Furthermore, due to Mexico’s contentious church/state history, the Mexican Church tends to be more ideologically conservative than the rest of Latin America. Some regions, though, have been influenced by liberation theology (Chand 2001, 193), and there is measurable

difference in ideological belief. Mexico's transition from single-party rule has produced regional variation in party competition (Hiskey and Bowler 2005; IFE 2010), and Mexico is marked by demographic variation in economic development, ethnic characteristics, and religious competition (INEGI 2010; ONDH 2008).

### *Quantitative Analysis*

Furthermore, Mexico's relatively high level of economic development allows access to statistical data covering the entire nation, at the municipal level, detailing regional variation in all of the above measures. The existence of such rich data permits use of sub-national large-N statistical analysis to neutralize irrelevant variables and isolate theorized causal effects (Gerring 2004, 350), increasing valid causal inference (Snyder 2001), and facilitating abstraction to test general causal relationships with broad theoretical implications beyond Mexico (King, Keohane, and Verba 1994).

The project accordingly makes use of quantitative analysis. Statistical analysis is useful in establishing general relationships, controlling for a large number of variables, and estimating causal effects (King, Keohane, and Verba 1994; Collier Seawright and Munk 2004, 23, 26; Gerring 2004). My statistical analysis tests the general relationship linking levels of religious institutional decentralization to levels of political participation across all of Mexico utilizing a dataset I have constructed from a variety of sources. It also tests and controls for the influence of religious ideology, religious competition, party competition, historical church/state legacies, relative deprivation, ethnic fractionalization, and individual-level factors.

I utilize data from the National Survey over Political Culture and Civic Practices (ENCUP). The ENCUP dataset analyzes the perceptions, knowledge, attitudes and

behaviors of Mexican citizens in a nationally representative survey. I combine this dataset with additional data detailing Mexican demographic characteristics, Church organizational characteristics, and electoral outcomes.<sup>5</sup> The resultant dataset uses more than 13,000 individual observations that are used in fixed-effects logistic regression and fixed-effects negative binomial regression to test the general proposition that religious decentralization leads to heightened levels of political activism. These statistical tests are presented in Chapter 4, along with tests of the alternative explanations elaborated above.

### *Qualitative Investigation*

Despite the advantages of statistical analysis, qualitative analysis maintains a comparative advantage in examining the causal processes stipulated by my theory. In order to develop a thoroughly convincing argument that decentralization prompts political activism, it is necessary to demonstrate that the decentralization of monitoring, sanctioning, and decision-making authority of religious institutions to laity prompts increased reciprocity, increased contributions to religious club goods, and the subsequent development of an organizational base that is then directly applied to political activism. While the statistical analysis I develop establishes a general relationship between decentralization and political activism, examination of the mechanisms at work required localized, qualitative field-work with a comparative methodological advantage in explicating causal mechanisms (Gerring 2007).

My qualitative examination focuses on indigenous activism, a particularly interesting subset of political activism. Across Latin America, Africa, Asia, and Europe, economically, politically, and socially disenfranchised indigenous individuals have

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<sup>5</sup> As described in further detail in Chapter 4.

collectively banded together for political change despite being particularly susceptible to the costs of time and financial recourses inherent to political activism. Indigenous activism accordingly provides a compelling test of the theory by examining individuals least likely to engage in collective action. Additionally, indigenous political movements have become frequent and important focal-points for resistance against neoliberal economic policies and have increasingly becoming the focus of scholarly analysis (Yashar 2005, Mattiace 2009; Rus et al. 2003; Van Cott 2010).

Finally, the inherently ethnic character of indigenous activism provides an opportunity to assess the impact of religious institutions against ethnic theories of political activism. The qualitative case studies presented in this dissertation accordingly focus on indigenous activism by examining the Mexican states of Chiapas and Yucatán. However, I also examine Morelos to assess the relationship between religion and political activism in a non-indigenous setting, ensuring nothing particular to indigenous political activism drives the results of the case studies.

Southern Mexico is home to the largest indigenous populations of Mexico, but the vitality of indigenous movements varies considerably across the region. Indigenous mobilization has been strongest in Chiapas and Oaxaca but limited in Yucatán and Puebla (Mattiace 2009; Trejo 2009). Applying a similar logic as Varshney's study of ethnic violence in India, this study works off the underlying assumption that it is impossible to develop a theory of political activism without also demonstrating that its posited causes are absent where such activism has failed to develop (Varshney 2003, 6). This study accordingly examines whether religious organization contributes to the presence of

indigenous activism in Chiapas and its absence in Yucatán within “a controlled comparison based on variance” (Varshney 2003, 14).

According to Guillermo Trejo’s *Mexico’s Indigenous Insurgency* (MII) dataset, Chiapas experienced a total of 2,382 protest events from 1976 to 2000 as compared to 60 in Yucatán over the same period (Trejo 2010).<sup>6</sup> While similarly systemized quantitative evidence is not available for associational activity, qualitative evidence strongly suggests civic associational activity is markedly higher in Chiapas than in Yucatán (Mattiace 2009). An important exception involves voting, where Yucatán displays historically higher levels of electoral turnout than Chiapas. During the 2006 Presidential elections, for example, Chiapas experienced a turnout rate of 47.97% while Yucatán’s turnout rate was 66.11% (IFE 2010).

On the other hand, the cases share many similarities. Both are located in southeastern Mexico and have large indigenous populations. 37.3% of the inhabitants of Yucatán speak an indigenous dialect, and in rural villages the proportion is often as high as eighty or ninety percent (INI-CONAPO 2000). Similarly, 24.6% of Chiapas’ inhabitants speak an indigenous dialect, with much larger shares in rural villages (INI-CONAPO 2000). Both have experienced relatively high levels of Protestant evangelicalism. Though Chiapas has experienced the largest levels of religious competition in Mexico, with only about 64% of its population adhering to Roman Catholicism, Yucatán has also experienced a great deal of advances in Protestant

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<sup>6</sup> Trejo’s protest events capture demonstrations, road blockades, hunger strikes, and the like undertaken by indigenous populations and movements across “883 Mexican indigenous municipalities between 1975 and 2000 (Trejo 2009, 329-330). “A protest event is assigned to a municipality every time indigenous villagers or groups from that municipality participate in a protest event, regardless of where the event takes place.” (Trejo 2009, 330).

competition as 20% of its population do not consider themselves Catholic (INEGI 2010). Both share histories at the periphery of Mexican politics, allowing for cases that are relatively untainted by the strife of the Cristero War (Chand 2001, 160). Furthermore, because this comparison utilizes two cases in the same country, both share the same national government, largely controlling for the influence of federal policies.

The Catholic diocese is the unit of analysis of the study. The political state of Chiapas is divided into three dioceses: the Archdiocese of Tuxtla Gutiérrez to the Northwest, the Diocese of Tapachula to the South, and the Diocese of San Cristóbal de las Casas in the mountainous and indigenous northeastern portion of the state. This study focuses its investigation on the Diocese of San Cristóbal de las Casas as 80% of the indigenous population of the state reside in this diocese, facilitating comparison with the Archdiocese of Yucatán. It is also where the majority of indigenous activism in Chiapas has taken place - 2,132 of Chiapas' 2,382 protest events occurred in the Diocese of San Cristóbal de las Casas (Trejo 2010). The borders of the Mexican state of Yucatán and the Archdiocese of Yucatán are the same.

These dioceses allow for a most similar systems design (also known as Mill's Method of Difference) (Lijphart 1971, 687-688; Przeworski and Teune 1970, 32-33). As described above, the regions demonstrate dramatic variation in levels of associational and protest activity, with the Diocese of San Cristóbal de las Casas marked by very high levels and the Archdiocese of Yucatán marked by very low levels (Trejo 2009; Mattiace 2009). Yet they show similarities along a wide range of potentially confounding variables.



I identified municipal field research sites for the collection of interview data with the assistance of Guillermo Trejo's *Mexico's Indigenous Insurgency* (MII) dataset. The MII dataset tracks indigenous protest with city-year units of analysis from 1976 to 2000 (Trejo 2010).<sup>7</sup> In order to identify viable cities rather than city-years for qualitative investigation, I summed the total protest events in each municipality of Chiapas and Yucatán from 1976 to 2000 and developed averages of Trejo's provided measures of religious competition, corporatism, electoral competition, repression, poverty, and proportion indigenous population for each municipality over the same time period.<sup>8</sup> I added three additional variables. The first measured the population of each city in the year 2000 (INI-CONAPO 2000). I added a binary variable indicating whether the city was located in the Catholic Diocese of San Cristóbal de las Casas. This was done to differentiate the Diocese of San Cristóbal de las Casas from the other two dioceses of Chiapas and from the Archdiocese of Yucatán. A second binary variable was developed to assess whether a city belonged in the state of Chiapas or Yucatán. I then regressed the total number of protests in each municipality in Chiapas and Yucatán as a function of religious competition, corporatism, electoral competition, repression, poverty, proportion indigenous population, population, and the two binary variables for state and diocese.

Following the regression, I computed standardized residuals. The criteria for case selection was that cities must have had standardized residual values less than  $|2|$ , ensuring they were not in some way deviant (Seawright and Gerring 2008). The cities also needed

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<sup>7</sup> With gratitude to Professor Guillermo Trejo for providing me with his data on Chiapas and Yucatán before it was publicly available.

<sup>8</sup> See Trejo 2009, pages 330-331.

maximum variation in protest events to facilitate the controlled comparison. At the same time, the cities needed to be as near as possible across a range of theoretically relevant independent variables. I identified San Cristóbal de las Casas in Chiapas and Valladolid and Tizimín in Yucatán for investigation.<sup>9</sup> They display wide variation in the number of protest events.

The cities also display similar characteristics across a wide range of factors, including population, religious competition (with a mean across all communities in Chiapas and Yucatán ( $\mu$ ) of 1.55 and standard deviation ( $\sigma$ ) of 0.41), poverty ( $\mu = 0.47$ ;  $\sigma = 0.11$ ), corporatism ( $\mu = 0.59$ ;  $\sigma = 0.13$ ), electoral competition ( $\mu = 1.39$ ;  $\sigma = 0.18$ ), repression ( $\mu = 0.14$ ;  $\sigma = 0.44$ ), and proportion indigenous ( $\mu = 0.62$ ;  $\sigma = 0.28$ ), but maximum variance on protest ( $\mu = 14.89$  and  $\sigma = 35.1$ ). This makes these as representative as possible while maintaining a viable method of contrast across a range of variation in protest (Seawright and Gerring 2008). I present the characteristics of the selected cities in Table 1 below. A more detailed description of San Cristóbal de las Casas is presented in Chapter 5, while more detailed descriptions of Tizimín and Valladolid are provided in Chapter 6.

In addition to Chiapas and Yucatán, Cuernavaca also has an extensive history of political activism, particularly while the Diocese of Cuernavaca was under the stewardship of Bishop Sergio Méndez Arceo from 1952 to 1983 (Mackin 2003).

Cuernavaca provides an example of the impact of religious decentralization in a non-

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<sup>9</sup> I had originally identified a fourth case, Palenque in Chiapas, for analysis. Although the parish priest originally agreed to cooperate in my study after personally meeting with me, he later reconsidered. Rather than identifying a second research location in Chiapas, my research and interviews instead led me throughout much of the state, including regions as disparate as Bachajón, Chamula, Tuxtla Gutierrez, Comitán, and Las Margaritas.

indigenous context, helping to ensure that nothing particular to indigenous activism or ethnic identity drives the results found in the analysis of political activism in Chiapas and Yucatán. Only 4.7% of the population of Morelos is indigenous (compared to an average of 7.1% among Mexican states), and only 2.3% of the population of the state speaks an indigenous dialect. These numbers are even lower in the city of Cuernavaca where I conducted my qualitative interviews. 2.8% of the population is indigenous and 1.5% of the population speaks and indigenous dialect (INI-CONAPO 2000).

Table 1. Characteristics of Selected Cities

City	State	Protest Events	Population	Poverty	Standardized Residual
San Cristóbal	Chiapas	101	132,421	0.34	1.29
Tizimín	Yucatán	0	64,104	0.39	-0.40
Valladolid	Yucatán	6	56,776	0.33	-0.17
City	Religious Comp.	Corp.	Electoral Comp.	Repression	Percent Indigenous
San Cristóbal	1.32	0.24	1.65	0.81	0.31
Tizimín	1.58	0.41	1.66	0.00	0.66
Valladolid	1.23	0.49	1.60	0.00	0.64

Data for the qualitative comparisons was collected from secondary historical sources<sup>10</sup> and from more than 70 interviews conducted in the field from the spring of 2011 through the fall of 2012. I also used semi-structured interviews in the collection of my data. These have the advantage of generating reliably comparable data while allowing for the possibility of unanticipated responses (Leech 2002). Interviewees were selected through non-random purposeful and snowball sampling of Church officials, government

<sup>10</sup> With regard to the secondary historical data, historians may bring their own theoretical biases into their analyses, and it is subsequently problematic to treat these as pure histories for testing social scientific theories. However, such dangers can be mitigated to the extent that the researcher uses a variety of historical works, each expressing different explanations for the occurrence of the historical phenomenon of interest (Lustick 1996).

officials, civic leaders, and regular citizens. While the case studies cannot make a claim to the statistical representativeness of qualitative interview respondents, respondents were specifically selected to reflect a spectrum of socioeconomic statuses whose responses could then be triangulated against each other. Respondents were also targeted for their capacity to provide rich information on themes of theoretical interest to the study.<sup>11</sup>

Furthermore, access to indigenous communities was greatly facilitated by contacts within the Church, local government, and community leaders. A random sample of religious adherents within each parish was impossible for logistical reasons given my research site and because of the privacy concerns of local priests for their congregations. At the same time, random sampling in qualitative research may be inappropriate due to the large sampling error inherent in the relatively small samples used for in-depth qualitative interviews. Finally, “choosing someone at random to answer a qualitative question would be analogous to randomly asking a passer-by how to repair a broken down car, rather than asking a garage mechanic – the former might have a good stab, but asking the latter is likely to be more productive” (Marshall 1996, 523).

### *Conclusion*

This chapter has suggested that the current literature linking religious institutions to political activism falls within three broad categories: resource mobilization, ideological inspiration, and rational utility. The resource mobilization approach fails to explain how the laity themselves mobilize, and much of this literature has relied on anecdotal evidence rather than systematically collected data. The ideology literature suffers from empirical

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<sup>11</sup> All interviews were transcribed in Yucatán, Mexico by Spanish-speaking undergraduate students at the Universidad Autónoma de Yucatán.

inconsistencies, and it is difficult to identify the presence of political theology *a priori* without also referencing whether or not that particular political ideology prompted political activism. Rational approaches to the study of religion are highly suggestive, but, like the resource mobilization school, have not offered a convincing micro-level theory of how mainstream religious organizations prompt political activism by their laity. Little agency is given to the laity themselves.

I offer a theory of religious decentralization, suggesting that where religious institutions are characterized by decentralized monitoring, sanctioning, and decision-making authority to laity, communities are marked by heightened levels of reciprocal interaction, increased club goods production, and the development of an organizational base facilitating political activism. This theory is to be tested against a variety of other theoretical approaches that might also explain political activism by laity in Mexico. Agent-based modeling provides an ideal means to model the relationship given the expected complexity of interaction among individuals at a local level.

Latin America generally makes an interesting laboratory for assessing the relationship between religion and political activism due to the general predominance of a single religious institution. At the same time, there is a great deal of variation in variables of interest, such as the presence of religious competition. Mexico, in particular, provides a great deal of variation in these measures as well as access to data. Quantitative analysis is used to test the general predictions of the model, while qualitative analysis is used to assess the causal mechanisms. I select the Diocese of San Cristóbal de las Casas and the Archdiocese of Yucatán to conduct a controlled qualitative comparison examining variation in indigenous political activism, while the shadow case of the Diocese of

Cuernavaca is also included to ensure nothing particular to indigenous activism influences the results of the qualitative comparison.

The next chapter presents an agent-based model to examine the complex relationship between religious decentralization and political activism. Chapter 4 then assesses the general relationship between religious decentralization and political activism through a large-N statistical analysis of Mexican survey data. Chapters 5, 6, and 7 present my qualitative examinations of Chiapas, Yucatán, and Morelos. Finally, Chapter 8 discusses the conclusions of the study.

## Chapter 3

### RELIGIOUS DECENTRALIZATION AND THE EVOLUTION OF POLITICAL ACTIVISM: AN AGENT-BASED MODEL

The previous chapter elaborated a theory linking religious decentralization to political activism. Chapter 4 presents a statistical analysis establishing a general relationship between religious decentralization and political activism using nationally representative Mexican survey data. The causal mechanisms linking religious decentralization to political activism are further specified in this chapter and will be tested through qualitative investigation of Chiapas, Yucatán, and Morelos in Chapters 5, 6, and 7.

This chapter presents a computational agent-based model designed to model the evolutionary relationship between religious decentralization and political activism. The theory advanced by my dissertation and informed by this agent-based model suggests decentralized religious institutions provide heightened monitoring and sanctioning capacities at a local level, prompting heightened reciprocal exchange. This results in heightened contributions to club goods and the development of the organizational frameworks necessary to produce the public good of political activism.

The development of club goods is evolutionary. Following decentralization, it takes time for individuals to learn to anticipate cooperative reciprocal exchange from others. Initial contributions to club goods slowly prompt additional contributions from others, further increasing the value of the club good and increasing incentives for additional individuals to cooperate. The theoretical model is accordingly marked by propensities for feedback, heterogeneity amongst actors, and adaptation.

As discussed in the previous chapter, agent-based modeling maintains a distinctive comparative advantage in modeling theories involving social complexity. Agent-based models are capable of modeling path-dependent histories where initial cooperative contributions prompt further cooperative interactions from others. Within the context of my theory, agent-based modeling can track the evolution of the production of club and public goods resulting from systematically varied levels of religious decentralization.

My agent-based model recreates a population of individuals divided into two groups. One group belongs to a particular religious institution, and the rest of the population does not. Individuals are randomly drawn to interact under a prisoner's dilemma scenario in either club or public goods interactions (as described below). The prisoner's dilemma is chosen because it recreates the challenges associated with producing collectively provided goods. Political activism is a public good entailing costs of time, money, and potentially safety. While at least a subset of society stands to benefit from the political change that potentially results from political activism, all individuals have incentives to free-ride off the efforts of others to avoid paying these costs. The prisoner's dilemma captures the payoffs of such a situation well. Cooperation to produce political activism has a mutually beneficial impact on all agents, but actors have strong incentives to "defect" by free-riding off the efforts of others. By doing so, they can enjoy the benefits of others' efforts and contributions without paying the inherent cost themselves.

This chapter proceeds by first describing the world of the agent-based model and the basic club and public goods games. Club goods games involve the production of



excludable material religious club goods by members of the religious group. Public goods games involve the production of political activism, a non-excludable public good, and these interactions are opened up to include all members of the population. The researcher determines the proportion of interactions in which the two games are played. The club goods games exclusively involve members of the religious club interacting in the production of excludable material club goods. Members first decide whether or not they will interact. They take the reciprocity they generally anticipate from others, as well as the reputation of their drawn counterpart, into account before deciding whether or not to interact.

If both agents decide to interact, they then calculate separate utilities for cooperating and defecting. In making these calculations, they first take standard prisoner's dilemma payoffs into account. This is to say that both gain from mutual cooperation, but the best payoff entails defecting while one's counterpart cooperates. However, agents also consider the likelihood that defection will be monitored by members of the religious club, and, if monitored, how severe sanctioning will be. Sanctioning entails exclusion from the religious organizations' material club goods. Agents assess the club's history of providing material club goods to members. This history is determined by the number of previous club interactions that have resulted in cooperative contributions. The greater the previous level of cooperation within the club, the greater the potential loss if an individual's defection is monitored and sanctioned.

In public goods games, interactions are opened up to the entire population. Interactions proceed in the same manner as in the club games. Individuals still decide whether or not they will interact with others, and if they do, they decide whether to

cooperate or defect. However, political activism is a public good that cannot be excluded from non-contributors. Thus members of the general population who are not members of the religious club make no consideration of monitoring or sanctioning in their utility calculations. Members of the religious club, however, make similar calculations regarding the provision of public goods as they do in the production of club goods when interacting with a fellow club member. Defection is still sanctioned. Once decentralized, the theory suggests that religious organizations have engendered both the cultures of reciprocal exchange and the organizational monitoring and sanctioning mechanisms to encourage contributions to political activism.<sup>12</sup>

Following the description of the model, I present my experiments systematically and separately varying levels of monitoring and sanctioning.<sup>13</sup> As described, monitoring and sanctioning are separately varied at successive values, and the model is run at each value 100 times. I present average values over these 100 model runs of political participation, reciprocal interaction, and the provision of material club goods at each interval value of decentralization. The results show that heightened levels of decentralization are associated with heightened political activism, higher levels of anticipated reciprocity from others, and higher contributions to religious club goods.

Finally, the model has the comparative advantage of modeling heterogeneous social preferences. The theory elaborated in the previous chapter takes religious ideology

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<sup>12</sup> At the same time, members can always withdraw from an interaction without penalty (Orbell and Dawes 1993; Janssen 2008). They are never forced to provide public goods as a condition of receiving excludable club goods.

<sup>13</sup> Within the context of the agent-based model, decision-making is implied to be decentralized with levels of monitoring and sanctioning. Without decentralized decision-making, agents would not be free to pursue their own autonomously chosen political goals.

seriously by suggesting a minority cadre of religiously committed individuals cooperate unconditionally in their interactions with others. I assess the impact of these pro-social cooperators by varying their number systematically. When there are no such cooperators, decentralization still enables political participation, but higher levels of monitoring and sanctioning are necessary than in situations in which there are higher numbers of pro-social cooperators. The results suggest that such religiously committed membership provides critical kindling to spark sustained cooperative interactions among the general population.

### *Model Description*

My model uses Netlogo's programming software and builds off a framework developed by Janssen (2008) examining signaling and cooperation. The population consists of two types of agents: a user-specified proportion of individuals who are part of a religious organization and the remainder who are not. Each agent has his/her own unique level of anticipated reciprocity from others and his/her own unique reputation. The model randomly draws two agents from the same religious institution to interact with each other in the production of an excludable religious club good, or it randomly draws two agents from the entire population to produce political activism, a public good. Political activism is produced when at least one of the actors cooperates during a public goods interaction. The frequency of the public goods game is chosen by the researcher. Agents have the option to either withdraw (in which case no interaction occurs), defect, or cooperate. The majority of agents do so under a prisoner's dilemma payoff structure

that assumes agents desire the goods being produced but have an incentive to free-ride off others.<sup>14</sup>

A small minority of agents in the religious group, on the other hand, will cooperate with all individuals with whom they decide to interact, reflecting religion's empirically demonstrated pro-social effects. If they decide to interact, they never defect and always cooperate. The procedures for both the club goods game and the public goods games are described below.<sup>15</sup>

*Religious Club Goods:* If the interaction is for a religious club good, two agents (A and B) are drawn randomly from the religious in-group to interact. Within the round, Agent A first decides whether or not he/she will even participate in the interaction as a probability based on: *i*) the reputation of Agent B, to the extent Agent A is aware of it,<sup>16</sup> and *ii*) Agent A's own general expectation of reciprocity from others. Agent B does likewise with respect to Agent A. If either chooses to withdraw from the interaction, the round ends and everyone receives the payoff for withdrawing ( $\pi = 0$ ).<sup>17</sup> If both decide to continue, the majority of players evaluate the expected utility of cooperating and defecting separately based on Prisoner's Dilemma payoffs. A minority of theologically inspired agents will cooperate unconditionally.

Critically, agents' utility calculations are also influenced by the levels of monitoring and sanctioning. If caught defecting, agents are sanctioned for a specified

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<sup>14</sup> See Appendix A § A.3 for the payoff structure.

<sup>15</sup> See Appendix A § A.1 and A.2 for a detailed discussion of the model's initialization parameters.

<sup>16</sup> The monitoring rate (discussed below) determines the probability Agent A knows Agent B's reputation. If Agent A is unaware of Agent B's reputation, Agent A interacts with Agent B with a 50% probability.

<sup>17</sup> See Appendix A Section A.4 for the mathematical equation for agents' decisions to interact.

number of rounds ( $s$ ) by exclusion from the goods provided by the religious group. The number of club goods provided is variable as the model progresses and depends on the level of cooperation of religious club members. Agents approximate the potential value of these goods by considering how many club goods the religious organization has produced over the previous ( $s$ ) rounds. They also consider the probability they will be caught, as determined by the monitoring rate.

The monitoring rate ranges from 0 to 1. When monitoring is set to 0, interactions with religious members have a zero probability of being monitored. No other agents in the religious club will be aware of the result of the interaction. When monitoring is set to 1, interactions within the religious institution have a probability of 1 of being monitored, and all other religious agents will be aware of the result of the interaction. All interactions in which at least one agent cooperates produce a club benefit for all other club members.<sup>18</sup> If agents are caught defecting, sanctioning means they no longer receive this benefit, and no club member will interact with this individual during the tenure of the number of rounds for which the defecting member has been sanctioned.<sup>19</sup> Though clergy may be inclined to commute or lessen lay sanctioning decisions, higher levels of sanctioning imply that this occurs less frequently.

*Political Activism/Public Goods:* If the second game is played, two agents are randomly drawn to produce political activism, a non-excludable public good. Using the same process as described in the club goods game, individuals decide whether or not to

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<sup>18</sup> This benefit is based on having received the benefit of the group contributor's cooperation without paying a cost in its production.

<sup>19</sup> See Appendix A § A.5 for mathematical equations for agents' strategic calculations.

interact based on their anticipated reciprocity and reputation and assess the expected utilities of cooperation and defection. However, in the public goods game, the interaction is not restricted to religious group members, but is instead opened up to the general population. The interaction can accordingly consist of 1) two individuals in the religious group, 2) one individual who is in the religious group and another who is not, or 3) two individuals unaffiliated with the religious group.

1) If the interaction consists of *two individuals in the same religious institution*, the interaction occurs in precisely the same manner as in the club goods game. Any defecting behavior has the potential to be monitored and sanctioned accordingly. Agents have access to the reputations of each other depending on the monitoring of the religious institution.

2) If the interaction is *between an individual belonging to the religious institution and an individual who is not*, the interaction is not monitored by the religious institution, and a defecting agent receives no impact to his or her reputation. The out-group member has his/her own perception of the general reputation of the in-group, which is subsequently influenced by the in-group member's decision to cooperate or defect after the interaction. The in-group member similarly has a sense of the general reputation of the out-group, which is impacted by his/her opponent's cooperation or defection.

3) If the interaction consists of *two non-religious group members*, there are no monitoring or sanctioning considerations involved. The general reputation of the out-group of each actor is impacted by the other's decision to cooperate or defect.

At the end of either the public or club goods game, the agent receives his/her immediate Prisoner's Dilemma payoff. Agents "learn" after each interaction. If opposing

agents cooperate, agents expect more reciprocity from others and are thus less likely to withdraw from interactions in the future. If an opposing agent defects, agents decrease their anticipated reciprocity from others and become more likely to withdraw from interactions in the future. In addition to adapting their behavior based on their own personal experiences, agents also have the capability to see the payoffs of other agents and copy the behavior of successful individuals.<sup>20</sup> The evolutionary procedures have the advantage of assessing whether emergent systems are robust to the introduction of new agents.

### *Experiments*

Two series of simulation experiments were performed to examine the impact of religious decentralization on political activism, with decentralization entailing greater monitoring and sanctioning capabilities. Monitoring and sanctioning are analyzed separately because, though tightly connected, they are not identical processes.<sup>21</sup> As the monitoring and sanctioning experiments have similar results, only results from the monitoring experiments are presented here.<sup>22</sup> Sanctioning is held constant at an intermediate value of 7 sanctioned time-steps. Monitoring is allowed to vary from 0 to 1 at successive interval values of 0.1 while holding all other variables constant. Each parameter value is run 100 times, for a total of 1,100 runs. Each model run contains 15,000 individual time-steps (individual interactions).

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<sup>20</sup> See Appendix A § A.6 & A.7 for discussions of both learning and evolutionary behaviors.

<sup>21</sup> Decision-making is implicitly devolved with monitoring and sanctioning capabilities in the agent-based model.

<sup>22</sup> All sanctioning results are included in Appendix B.

The agent-based model allows for tracking several variables produced as a result of individual interactions at controlled parameter values. Of greatest concern is the production of political activism, a non-excludable public good produced out of interactions involving the general population where at least one individual cooperates. The model sums the total number of these interactions at the end of each model run (15,000 interactions). The second variable is the general level of anticipated reciprocity in the population, measured as the average of all individual agents' level of anticipated reciprocity from others at the end of each model run. The third variable is the general level of reputation, measured as the average of all individual agents' reputation at the end of each model run. The final variable is the total production of religious club goods.

*Initial Parameterizations:* The parameters of the model were chosen due to their face validity and because they show a dynamic range of behavior. A sensitivity analysis wherein each of these parameterizations is systematically varied is presented in Appendix C. Table 2 shows baseline parameter values and the subsequent values used for the sensitivity analysis. As both monitoring and sanctioning need to be enacted for decentralization to affect political activism, very low levels of sanctioning make it difficult for monitoring to exert an impact. On the other hand, very high levels of sanctioning need only small levels of monitoring in order to prompt high levels of political activism. If set too high, sanctioning does not allow the researcher to examine the subtle effects monitoring might have. Accordingly, sanctioning is set to an intermediate value of 7 in the monitoring experiments.<sup>23</sup>

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<sup>23</sup> The rationale for all other initial parameter conditions is provided in Appendix A § A.2.



Table 2: Baseline Parameter Values and Sensitivity Analysis

<i>Parameter (Global Variables)</i>	<i>Baseline</i>	<i>Sensitivity Tests</i>
Monitoring (Sanctioning Experiments)	0.5	0.3, 0.7
Sanctioning (Monitoring Experiments)	7	5, 9
Number of agents ( $n$ )	100	50, 400
Steepness: ( $\gamma$ )	2	1, 3
Anticipated Reciprocity and Reputation Boundary ( $b$ )	0.5	0.2, 1.0
Learning Rate ( $\lambda$ )	0.05	0.02, .1
Percent of Individuals in Religious Group ( $p$ )	50%	30%, 70%
Frequency of the Public Goods Game ( $f$ )	20%	10%, 50%
Pro-Socially Motivated	10%	0%, 25%
Individuals replaced at each generation ( $g$ )	10%	0%, 20%
Interactions per generation ( $r$ )	500	200, 1000
Mutation Rate (reputation and anticipated reciprocity) ( $m$ )	0.2	0, 0.4

### *Results*

Figure 1 displays the mean number of interactions resulting in political activism for 100 model runs at each monitoring interval. Low levels of monitoring result in relatively low levels of political activism. The mean of the 100 runs with monitoring set to zero shows that an average of approximately 106 participatory interactions were created in each run. There is no statistically significant difference between the political activism produced at monitoring values of 0, 0.1, and 0.2. At a monitoring value of 0.3, the model begins to become more dynamic - an average of approximately 143 participatory interactions are produced, and the difference from model runs where monitoring is set to 0 is statistically significant at  $p < 0.001$ . The model then begins to take off as the number of participatory interactions increases to an average of approximately 622 per run by the time monitoring is increased to 0.7. At the highest levels of monitoring, the model exhibits decreasing returns. By the time monitoring is at a value of 1, an average of 680 participatory interactions are produced per model run. The

dispersion in participatory interactions produced at the intermediate monitoring values of 0.3 through 0.6 is noteworthy and will be revisited in a moment.

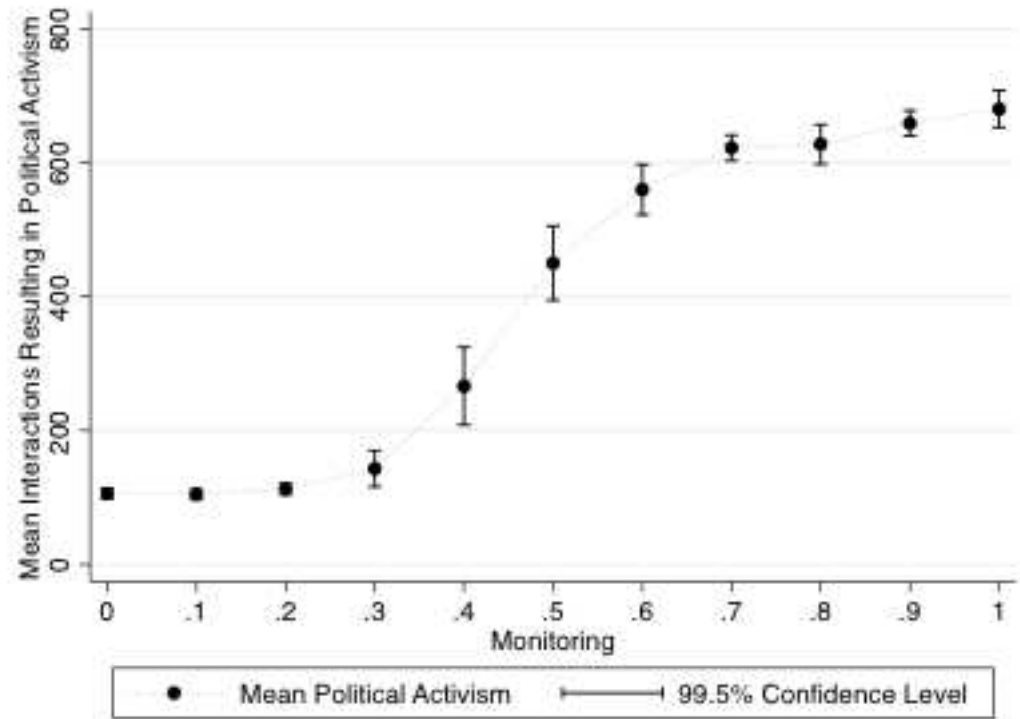


Figure 1. Monitoring and Political Activism

Figure 2 presents the distribution of participatory interactions of all 100 model runs when monitoring is set to 0, 0.5, and 1. Sanctioning is held constant at 7. At a low level of decentralization where monitoring is set to 0, we see that model runs are tightly clustered, with a mean of 106, standard deviation of 26.5, and maximum and minimum values of 215 and 62, respectively. 94 of the 100 model runs predicted between 50 and 150 total interactions resulting in political activism. Though not as tightly clustered, when monitoring is set to 1, we see 97 of 100 model runs produced at least 600 participatory interactions with a mean of 680, standard deviation of 96.5, and maximum and minimum

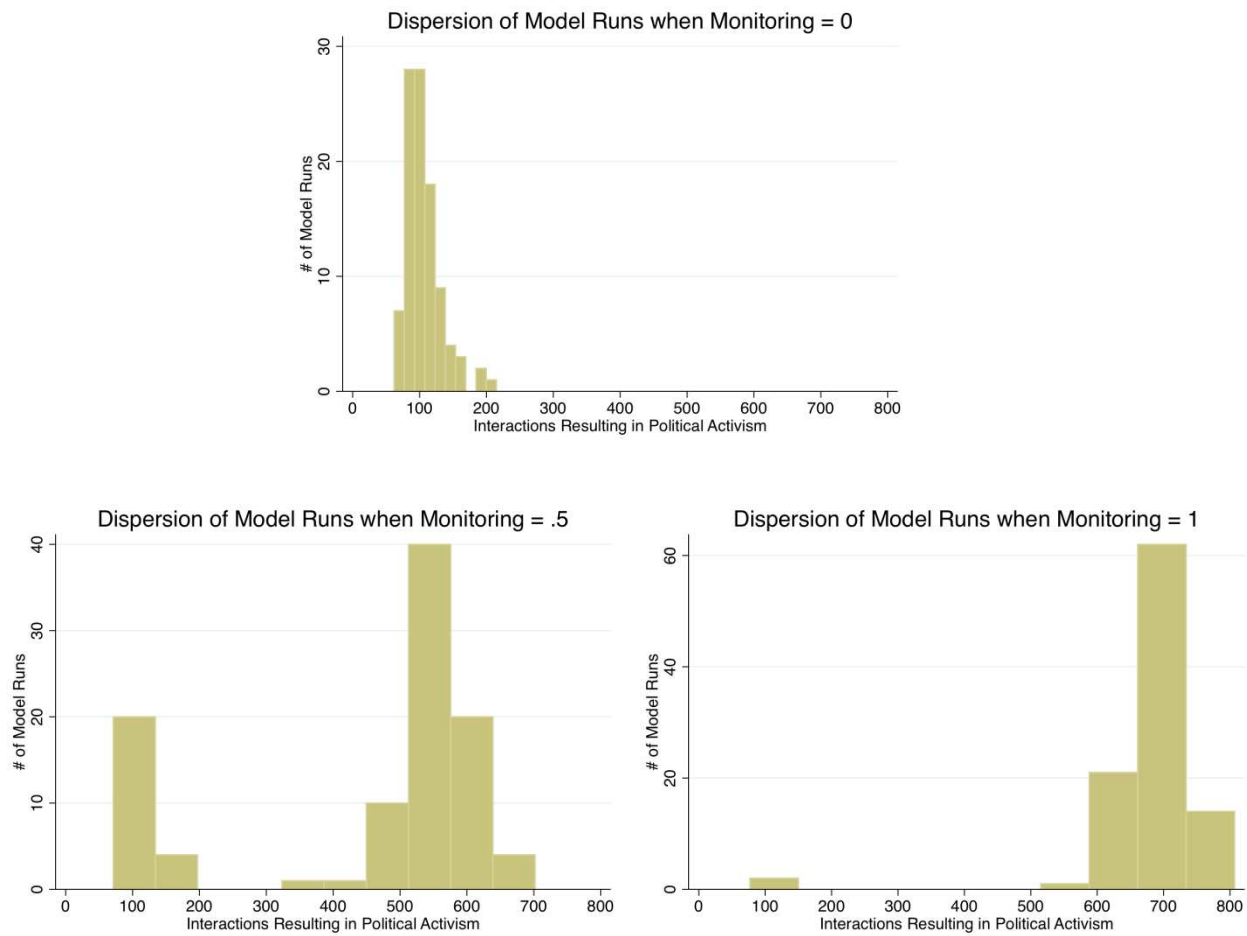


Figure 2: Dispersion Across Model Runs

values of 807 and 77. Even with the highest values of monitoring, it was possible for cooperation to lag, as exhibited by two model runs that hovered around 100.

The most dynamic and interesting behavior of the model occurs at the intermediate values, here represented by monitoring set to 0.5. The institutional incentives have less certain impacts in these runs. A mean of 450 participatory interactions were produced across model runs, but the standard deviation is 195, with maximum and minimum values of 71 and 702. While 74 out of 100 runs produced at least 450 participatory interactions, we see 24 model runs where the number of participatory interactions produced is within the range of 70 to 200. This speaks to the feedback mechanisms built into the model, the importance of critical junctures, and the influence of path dependency as cooperation either emerges or fails to emerge at this particular level of monitoring. The model is not deterministic. At critical junctures, when cooperation was perhaps emerging but fragile, some actors made the decision to cooperate based on their own particular traits and histories of interaction within the model. This further increased levels of anticipated reciprocity and reputations and created a path where individuals were increasingly likely to cooperate. On the other hand, in other model runs at similar critical junctures, actors made the decision to defect based on their own individual attributes. This decreased levels of anticipated reciprocity from others and reputations and create a downwardly spiraling path of defection and withdrawal from interaction.

Figure 3 illustrates the impact of monitoring on the mean values of general anticipated reciprocity and agent reputation after 100 model runs. Unsurprisingly, monitoring has a similar effect on the levels of anticipated reciprocity and reputation as it

does on interactions resulting in political activism. There is a surprising development with regard to monitoring's relationship with reputation. With monitoring levels between 0 and 0.3, there is actually a negative relationship between average reputation and monitoring. This is likely because most agents still have strong incentives to defect. The club goods produced are not sufficiently large to prevent defection, but agents are more aware of other agents' defecting behavior through increased monitoring. This relationship becomes positive, however, once monitoring is equal to 0.4 and beyond. Increasing levels of monitoring generally appear to have a positive impact on average values of anticipated reciprocity and reputation across model runs.

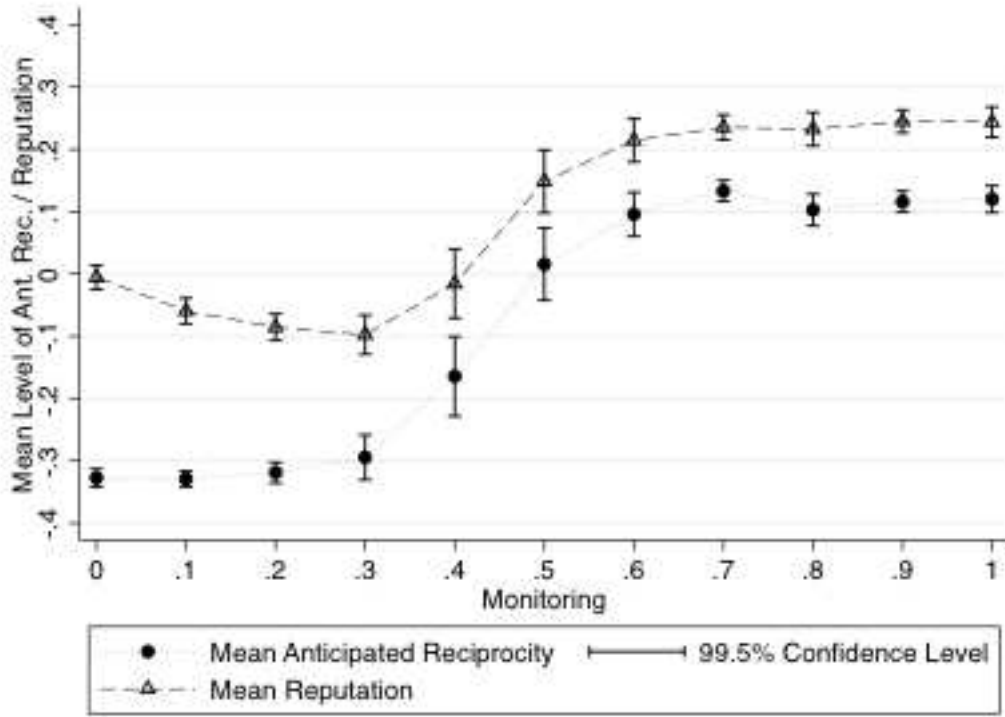


Figure 3. Impact of Monitoring on Anticipated Reciprocity and Reputation

Figure 4 examines decentralization and the provision of club goods. We see a relationship between decentralization and the provision of club goods that is similar to

the relationship between decentralization and political activism, suggesting political activism is linked to effective club good provision. Increasing values of the club good limit defection as individuals do not want to risk being sanctioned from their provision. Public goods like political activism are difficult to provide because there is no enforcement mechanism to punish non-contributors. However, effective clubs have the anticipated reciprocity and sanctioning machinery in place to encourage member participation in the production of public goods.

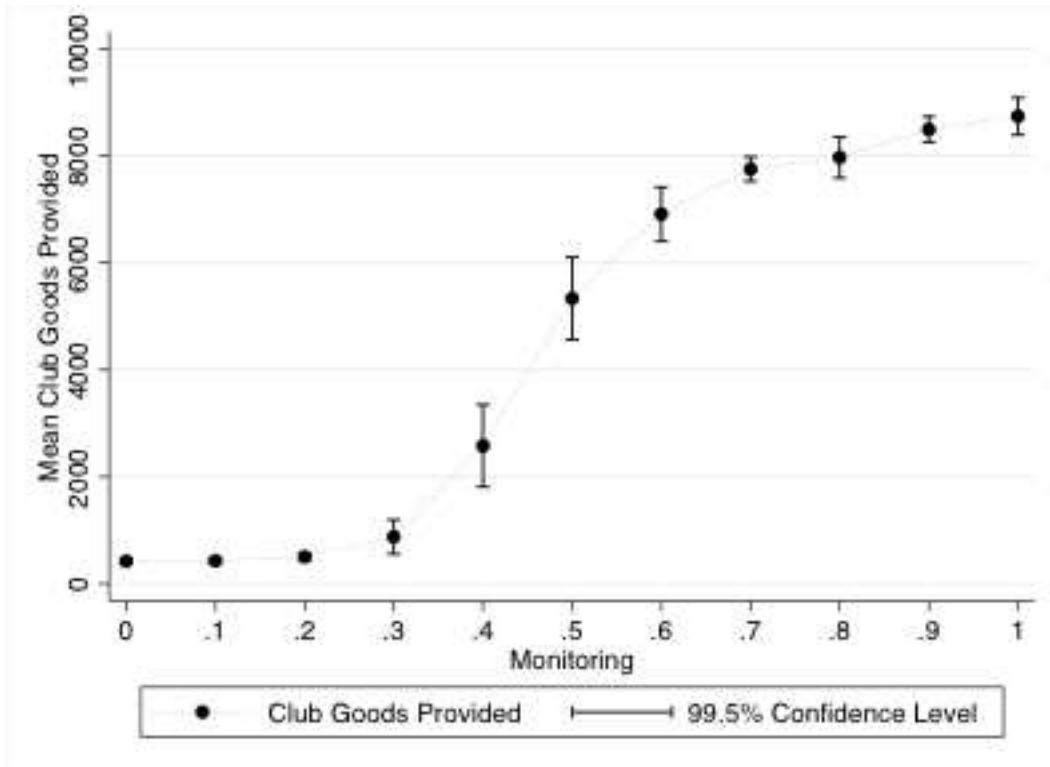


Figure 4. Monitoring and Club Good Provision

Finally, we must consider religion’s impact on pro-social behavior. Figure 5 demonstrates the effect of varying numbers of individuals in the model who, due to religion’s pro-social effect, cooperate in all interactions they agree to enter into. When there are no pro-social cooperators, there must be higher monitoring levels than seen in

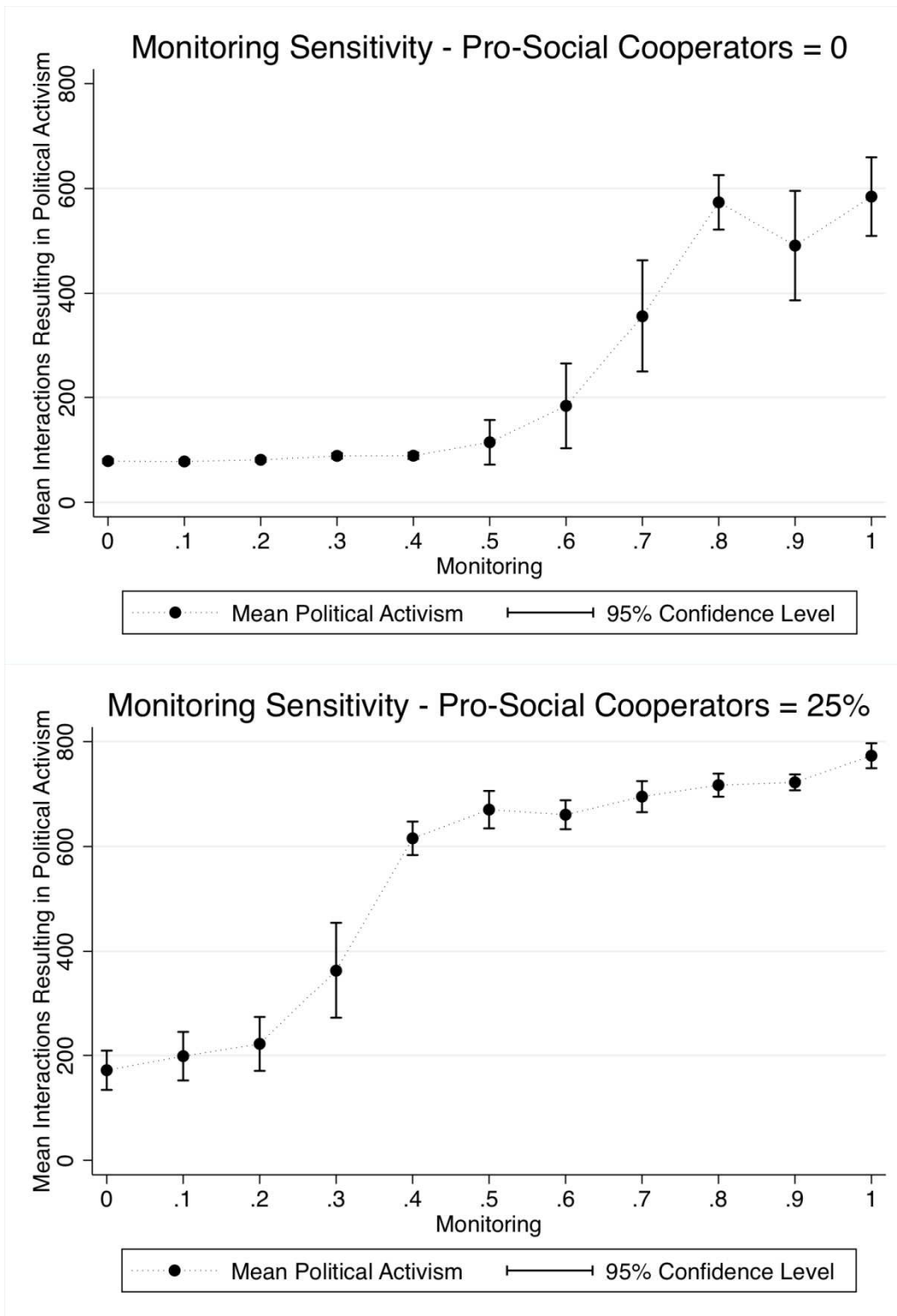


Figure 5: Religion's Pro-Social Effects

the baseline model of Figure 1 to prompt widespread political activism. By contrast, if we assume 25% of the religious population will always cooperate, we see much lower levels of monitoring are necessary to prompt political activism. There is, again, a highly path-dependent quality to the model. Sustained cooperation can emerge or collapse as a result of individual interactions at critical junctures. To the extent that ideologically committed individuals are interacting during these critical junctures, they increase the probability cooperation will occur at key moments, enhancing the value of the club good, lessening the incentives of self-interested agents to defect, and increasing anticipated reciprocity. Monitoring and sanctioning are still important, however, as they provide the self-interested religious majority with incentives to interact and cooperate. Religion's pro-social effect often proves an effective mobilizer because it provides a catalyst for cooperative interactions, lessening the monitoring and sanctioning necessary to encourage sustained cooperation.

### *Sensitivity Analysis*

The preceding model analysis utilized a particular set of model parameters such as the percent of individuals in the religious in-group and anticipated reciprocity and reputation thresholds. Each of these parameters can take a variety of values. It is therefore important to demonstrate the results obtained above are not due to a particular combination of parameters, and that the general pattern holds when parameters take on different values. Sensitivity analyses to alleviate this concern are presented in Appendix C of this dissertation.



## *Conclusion*

Within this chapter, I contributed an agent-based model explaining, at a micro-level, political activism spurred by religious decentralization. The model examined the interactions of actors in a prisoner's dilemma setting where agents withdraw, cooperate, or defect in the production of either political activism (a public good) or religious club goods. The agent-based model predicted that where religious organizations are characterized by decentralization to laity, actors engage in increasingly cooperative interactions within the religious club, levels of anticipated reciprocity grow, religious groups provide heightened levels of excludable religious club goods, and religious clubs develop organizational capacities to produce non-excludable political activism. Religion's ability to elicit pro-social behavior from membership lessens the monitoring and sanctioning necessary to prompt collective action, making it an efficient mobilizer.

The agent-based model provides a compelling theoretical exercise accounting for how religious decentralization prompts the evolution of political activism through the effective provision of material club goods. However, the model must be validated by empirical evidence. First, there should be a general and broad relationship between religious decentralization and political activism. Chapter 4 presents a statistical analysis that demonstrates such a relationship between religious competition and political activism among survey respondents in Mexico.

While this statistical analysis establishes a general relationship between decentralization and political activism, it does little to illustrate the mechanisms posited by the agent-based model accounting for how this relationship is produced. Qualitative

analysis has a comparative advantage in this regard. If the mechanisms specified by the model produce political activism, religious decentralization should be marked by increased capacities for decision-making, monitoring, and sanctioning of religious material club goods. Decentralization should allow individuals to anticipate reciprocal exchange from others. Empirically, this should manifest itself through increased reciprocal exchanges between individuals and across communities. Individuals should be increasingly drawn to interact in religious clubs as they provide increasing levels of material club goods for their members. These effective religious clubs should then directly contribute to the organizational base that engages in political activism. Where decentralization does not exist, we should see the absence of decision-making, monitoring, and sanctioning, little reciprocal exchange, no organizational network linked to religious institutions, and subsequently little political activism.

Chapter 5 illustrates the mechanisms of the model through the case of Chiapas. Here, I demonstrate that the Catholic Church decentralized authority to the laity. As specified by the agent-based model, this decentralization led to heightened levels of reciprocity, the effective provision of religious material club goods, and the development of an organizational base that enabled political activism by indigenous communities across the region. In contrast, Chapter 6 demonstrates that the Catholic Church did not similarly decentralize in Yucatán. The result, as also predicted by the agent-based model, has been few reciprocal networks, few religious clubs engaged in club goods production, and subsequently the absence of an organizational framework supporting political activism. Finally, Chapter 7 examines the relationship between religious decentralization

and political activism in the non-indigenous case of Morelos through a shadow-case that also follows the pattern established by the agent-based model.

## Chapter 4

### RELIGION AND POLITICAL ACTIVISM IN MEXICO: A STATISTICAL ANALYSIS

The previous chapter presented an agent-based model predicting a general and positive relationship between religious decentralization and political activism. The model also illustrated the causal mechanisms eliciting this general relationship. Chapters 5, 6, and 7 utilize qualitative analysis to examine the posited causal mechanisms that connect religious decentralization to political activism through case studies of Chiapas, Yucatán, and Morelos. The purpose of this chapter, however, is to account for the general relationship between religious decentralization and political activism through a statistical analysis of a pooled cross sectional survey dataset of Mexican political behavior. Is religious decentralization associated with higher levels of political activism? I test the data using fixed effects logistic regression and negative binomial regression. The results support the primary contention of this dissertation that religious decentralization has a positive impact on political activism in Mexico.

The chapter begins with a discussion of the measurement of political activism and the dataset used to conduct the statistical analyses. I then present hypotheses derived from my own theory as well as alternative explanations to be tested empirically. Throughout this discussion, I elaborate the measurement of these variables. I follow with a discussion of the statistical methods used to conduct the analysis, and I continue with a presentation of statistical results. Finally, I discuss cross-validation and re-sampling procedures performed on the model to guard against potential over-fitting.

### *Dependent Variable - Political Activism*

For the dependent variable, this statistical study examines the political activism of Mexican survey respondents. I utilize data collected by the National Survey over Political Culture and Civic Practices in Mexico (Encuesta Nacional Sobre Cultura Política y Prácticas Ciudadanas – ENCUP). This dataset analyzes the perceptions, knowledge, attitudes and behavior of Mexican voters in a nationally representative survey with causal leverage over nearly the entire Mexican electorate (ENCUP 2010). Mexican households were randomly surveyed from all of Mexico’s 31 states and the Federal District, and respondents were questioned over their participation in various protest activities, associational affiliations, and voting behavior. My statistical analysis draws on a pooled cross-sectional dataset of 13,463 individuals randomly surveyed by the ENCUP separately in 2001 (4,183 observations), 2003 (4,580 observations), and 2005 (4,700 observations). The dataset has been described as “easily the richest dataset available to explore political participation in the early years of Mexico’s new democracy” (Klesner 2009, 62).

I measure political activism across three dimensions, including *Protest*, *Political Associational Activity*, and *Voting*. The data allows for a variety of methods for analyzing *Protest*, which is operationalized across three separate measures. The first measure of *Protest* is a dichotomous variable assessing whether or not an individual participated in any one of several potential protest activities.<sup>24</sup> This is a broad measure that

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<sup>24</sup>Including organizing, sending letters to a newspaper, complaining to authorities, soliciting support from a civic association, attending marches, petitioning a political party for help, petitioning the federal legislature for help, calling a radio or TV program, writing the President or other authorities, signing

encompasses a variety of potential protest events. The second measure of *Protest* is a count variable that adds the total number of these various protest activities each individual has engaged in. The third measure of *Protest* isolates protest that is both political and collective, including whether an individual attended marches or petitioned government or party representatives.

*Political Associational Activity* examines associational membership in explicitly political groups. The ENCUP data questionnaire asks individuals about their involvement in a variety of potential associations.<sup>25</sup> Many of these, such as union membership or membership in professional associations, are not directly political. Accordingly, my measure of *political associational activity* captures only those forms of associational activity that are explicitly civic and political in nature. It is a dichotomous measure that includes whether individuals participated in political parties, political organizations, or civic organizations.

*Voting* is a dichotomous measure indicating whether an individual voted for President, Senator, Federal Deputy, State Governor, municipal president, or local deputies. Individuals are coded as having voted if they voted in any of these elections. See Table 3 (on pages 87-88) for summary statistics of all dependent variables.

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petitions, posting letters/fliers, circulating manifestos, carrying signs, or participating in any other form of protest.

<sup>25</sup> These include whether or not individuals are members of a union, a political party, a professional association, a cooperative, a political group, a benefit association, a religious group, a civic organization, a charitable organization, a neighborhood association, a retirement association, an art association, or any other form of association.

*Hypotheses and Independent Variables:*

Religious Decentralization: As theorized in Chapter 2, religious decentralization should create reciprocal interactions and an organizational base that can be applied to political activism. Qualitative analysis maintains a comparative advantage in linking these causal mechanisms of the theory. At the same time, data restrictions prevent testing them quantitatively. This chapter subsequently seeks to establish only the existence of a general relationship between religious decentralization and political activism. Increases in religious decentralization should be associated with increases in activity in protest and associational behavior.

However, the costs of political participation are not constant across its various forms. Associational activity can involve substantial investments of time and money. Protest often involves unknown (and potentially large) costs (Benson and Rochon 2004), but the costs of voting are relatively low. Thus, turnout may shed less light on collective action outcomes than other forms of political participation, and a larger number of variables have impacts on the decision to vote (Aldrich 1993, 265; Whitely 1995). Recent research has demonstrated that selective incentives prompting protest may be less effective in encouraging voting, and vice versa (Bäck et al. 2011). As such, I expect to see that the nature of religious institutional centralization has a stronger impact on associational and protest activity than on voting behavior.

*Hypothesis 1: Individuals living in dioceses with heightened levels of religious decentralization are marked by heightened levels of political activism. Voting activity is least likely to be affected by this relationship.*

Religious decentralization is captured quantitatively by measuring the number of deacons in each Catholic diocese. As the following qualitative chapters illustrate, deacons are lay Catholics trained by the Church to perform particular sacramental functions, and deacons in Mexico are often considered to be leaders in their respective communities (Trejo 2004, 202). They are directly empowered by the Church to perform priestly functions, represent the Church, and take on leadership positions within the community. Their numbers in each diocese, as expressed in the *Anuario Pontificio* and collected from the Catholic Hierarchy Organization (Hierarchy of the Catholic Church 2010), serves as an excellent statistical means to assess the decentralization of that particular diocese. Not only does the measure indicate literal devolution of control from the Church hierarchy to members of the laity, but the number of deacons in each diocese is also an important indicator of the general proclivities of a Bishop to devolve control of church activities to the laity more generally (Chand 2001, 169; Camp 1997).

The deacon measure is assessed three ways: 1) as a continuous measure, 2) as a dichotomous measure, and 3) as a categorical measure. First, in order to correct for a non-normal distribution, I take the natural log of the number of permanent deacons in each diocese.<sup>26</sup> Though better than the raw deacons variable, the resultant transformation still does not create a normal distribution due to a large number of dioceses with no deacons. Accordingly, I also capture religious decentralization with a simple dichotomous variable assessing whether or not a diocese contains any deacons. Furthermore, the results of the agent-based model elaborated in the previous chapter suggest the relationship between

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<sup>26</sup> To account for diocese with no deacons, 0.5 was added to the raw value of all deacon values before making the transformation.



religious decentralization and political activism is unlikely to be linear, and that at intermediate levels political activism may or may not emerge. Because of this, I assess the deacons variable categorically. The first category measures only those dioceses with no deacons, accounting for approximately half of all dioceses. The next measure, *Moderate Decentralization*, captures those dioceses that have an intermediate number of deacons. This measure captures roughly 40% of the dioceses in Mexico. Finally, *Heavy Decentralization* represents those dioceses ranking in the top 10% in numbers of permanent deacons. See Table 3 for summary statistics of all independent variables.

#### *Alternative Hypotheses*

Ideology: As discussed in Chapter 2, a variety of scholars have attributed differences in religious belief to differences in political behavior. Ideological frameworks suggest national churches in Latin America advocated most strongly for democracy where liberation theology took root amongst Catholic laity and bishops. As such, those diocese in Mexico influenced by progressive Catholicism are conjectured to prompt political activism.

*Hypothesis 2: Individuals in dioceses more receptive to progressive Catholicism are marked by heightened levels of political activism.*

To operationalize ideology, I borrow from Gill's ideological score suggesting the timing of a Bishop's appointment influences his receptivity to the influence of liberation theology. Gill argues that Bishops appointed under the most progressive Popes (John XXIII and Paul VI) were more likely to be influenced by progressive Church thinking (Gill 1998, 105-106). This measure is modified to reflect Mexico's own development.

Following John Paul II's selection as Pope, the Vatican sent a special envoy, Girolamo Prigione, to combat progressive trends in the Mexican Church. Prigione was largely insulated from the influence of the Mexican Episcopate, and he systematically replaced retiring Bishops with Bishops adhering to an orthodox and conservative social stance (Chand 2001, 183, 198). Accordingly, appointments of bishops made under Prigione's stay in Mexico as Vatican envoy (from 1978 to 1997) are expected to be more ideologically conservative than appointments made before or after his tenure. Data was collected from information provided by the Mexican Episcopal Conference (CEM – Conferencia del Episcopado Mexicano) detailing the date of the appointment of past and current bishops in all Mexican dioceses. The ideological variable is coded dichotomously as 0 if the bishop of a diocese was appointed under Prigione, and 1 if he was not (CEM 2011).

Religious Competition: Some suggest religious competition forces religious elites to be more attuned to the social needs of their laity. Under conditions of religious competition, elites shift the institutional support of their religion to a particular social cause, prompting collective action (Gill 1998; Trejo 2009). Accordingly, one would expect to see that regions marked by heightened levels of religious competition should be marked by heightened levels of political activism, as assessed by Hypothesis 3:

*Hypothesis 3: Individuals in regions marked by heightened levels of religious competition engage in higher levels of political activism.*

Data assessing religious competition has been collected at the municipal level from the 2000 Mexican Census (INEGI 2010). The census provides information on the

number of individuals who self-identify as Catholics, Historical Protestants, Pentecostals, members of the Church of the Living God, members of other evangelical groups, members of non-evangelical biblical groups, 7<sup>th</sup> Day Adventists, Mormons, Jehovah's Witnesses, Jewish individuals, other, or as non-religious. This data is used in an effective number of religions index (ENR) where 1 is divided by the sum of the proportion of individuals adhering to all religious groups.<sup>27</sup>

Party Competition. Increased political competition in Mexico during the 1980s and 1990s may have opened political opportunities for action (Kitschelt 1986; McAdam 1982; Tarrow 1994; Fearon and Laitin 2003). The PRI political party governed Mexico under a single-party system for fifty years, but this began to change during the 1980s. There are several mechanisms through which political competition might influence political activism. First, increased political competition may have heightened interest in political activism as Mexican voters increasingly perceived they had a legitimate choice and were free to act on it (Birch 2010; Franklin 2004; Norris 2004; McCann and Domínguez 1998).

Second, Anthony Gill has recently made the argument that political competition improves the bargaining power of religious institutions vis-à-vis the state. As he applies his argument to Mexico, the Church became more willing and capable of advocating on behalf of its interests as the PRI sought its support to help fend off challenges from political rivals, though this was predicated on the Church's ability to demonstrate that it could politically mobilize its laity (Gill 2008, 159-160). Political competition should then

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<sup>27</sup> ENR =  $1 / \sum r_i^2$ , where  $r_i$  is the proportion of individuals in a municipality adhering to religion  $i$ . (Trejo 2009).

increase Mexican political activism as Church leadership, to heighten its negotiating position, actively encourages the political activism of its laity. Through either mechanism, we would expect to see statistically that heightening levels of political competition lead to heightening levels of political activism. Accordingly, Hypothesis 4 states:

*Hypothesis 4: Individuals living in areas marked by increasing political party competition are marked by heightened levels of political activism.*

Municipal-level data for political party competition was obtained from the Mexican Federal Electoral Institute (*Instituto Federal Electoral* – IFE). The measure for party competition takes a Herfindahl index of the proportion of votes received by each political party at the municipal level for the proportionally represented seats in the Mexican federal lower legislative chamber – the Chamber of Deputies (Molinar 1991; IFE 2010; Hiskey and Bowler 2005). This creates a measure for the effective number of political parties. Lower legislative chamber elections are used because they are held every three years, as opposed to six years for the Senate and Presidential elections, giving the measure greater variation over time.<sup>28</sup>

History. History has been posited as playing a major role in church/state relations. It can alter the cost/benefit calculations of religious elites (Warner 2000), shape, in a path-dependent manner, the institutional opportunities a religious group has for representing its interests to the state (Fetzer and Soper 2005), and histories of conflict with the state, such as occurred in Mexico, can inhibit the willingness of religious elites

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<sup>28</sup> Municipal votes received for proportional vs. popular seats in the Chamber of Deputies have a correlation of 0.999.

to take a strong political stand (Chand 2001). Mexico's church/state history is marked by a great deal of conflict. As detailed in Chapter 2, the Mexican government pushed anti-clerical laws at the end of the 1920s, resulting in a violent uprising throughout the Mexican countryside that lasted several years. The violence took place primarily in the center of the country, and peripheral regions were largely unaffected. This has led some scholars to note that the Catholic Church has had more room to push for political activism in regions generally unaffected by the violence of the Cristero War (Chand 2001, 160). This theory suggests Hypothesis 5:

*Hypothesis 5: Individuals in regions less affected by the Cristero War should be marked by heightened levels of political activism.*

Data measuring the historical influence of church/state conflict in Mexico is taken from Jean Meyer's historical examination of the Cristero War, *La Cristiada: Los Cristeros, Vol. 3* (Meyer 1978, 108-109). Meyer presents data detailing the number of Cristero combatants in each Mexican state involved in the conflict. History is accordingly measured as the number of Cristero combatants (per one thousand) by *state*. See Table 3 for summary statistics for the History variable.

Economic Deprivation. As discussed in Chapter 2, accounts emphasizing relative deprivation and horizontal inequality might suggest that demand for political activism is higher where economic hardship creates demand for political change. Hypothesis 6 accordingly postulates:

*Hypothesis 6: Individuals in less-developed regions are more likely to engage in higher levels of political activism.*

Data for the relative deprivation measure is collected from the United Nations Programs for the Development of Mexico (ONDH 2008) detailing human development indices across Mexico at the municipal level. Deprivation is a relative measure where less-developed regions would be expected to have more economic hardship than regions ranking higher on the human development index.

Ethnicity. Ethnic heterogeneity might influence the provision of public goods through preference, technology, and strategy selection mechanisms. The “preference” mechanism suggests co-ethnics are more likely to produce public goods because they share common tastes and have higher other-regarding preferences for each other. The “technology” and “strategy selection” mechanisms suggest cooperation is heightened when individuals share the same language and cultural heritage, facilitating the location and punishment of defectors (Habyarimana et al. 2007). In Mexico, the most common ethnic cleavage is a distinction between indigenous individuals and mestizos. At the same time, there are a great number of various indigenous groups in Mexico, each speaking a different language and holding different customs. Preference, technology, and strategy selection mechanisms would be expected to hold within these individual indigenous groups. Theoretically, we would expect that regions marked by higher levels of ethnic homogeneity would be marked by heightened levels of public good provision, as expressed through heightened levels of political activism. This leads to Hypothesis 7:

*Hypothesis 7: Individuals in regions marked by higher levels of ethnic homogeneity are marked by heightened levels of political activism.*

Data on ethnic heterogeneity in Mexico has been collected from the National Commission for the Development of Indigenous Peoples (Comisión Nacional para el Desarrollo de los Pueblos Indígenas – CDI). The data details, at the municipal level, the proportion of individuals within a municipality speaking indigenous dialects. I use this data to create a Herfindahl measure of separate ethnicities as assessed through the squared sum of the proportion of individuals speaking a number of different languages in each municipality (Hegre and Sambanis 2006; CDI 2010).

#### *Individual Controls*

The data includes several individual controls as well. Older individuals, economically wealthier individuals, more religious individuals, and males are more likely to engage in political activism in Mexico (Klesner 2009). Accordingly, it is important to assess the impact of these individual attributes on the model.

All individual-level variables are collected from the ENCUP dataset. *Age* is a simple numerical number reporting the respondents' age. Respondents were asked to fill in their economic status into one of several provided categories. I have collapsed these categories in three simple measures of whether or not an individual self-identified as being economically well-off, average, or poor. *Male* is a dichotomous variable where individuals are coded as 1 if male and 0 if female. Individuals are also placed into categories based on their self-identified level of religiosity (this is only available in the 2003 and 2005 data) (ENCUP 2010). Individuals who never go to church, or who only go to church for special occasions, are coded in the No Religiosity category. Individuals who attend church less than once a week are coded in the Low Religiosity category,

individuals who attend church once a week are coded in the Medium Religiosity category, and individuals who attend church more than once a week are coded into the High Religiosity category.

### *Statistical Models*

In order to test these hypotheses, I use fixed-effects logistic regression and fixed-effects negative binomial regression models on a pooled cross-sectional dataset utilizing fixed-effects for both year and diocese. As described earlier, the nature of the ENCUP protest data makes it possible to construct various measures for protest. Several of the models rely on simple, dichotomous assessments of whether or not an individual has engaged in a particular political activity. Logistic regression has an advantage in this regard as linear probability models utilizing ordinary least squares creates the potential for biased estimates. While the data at hand does not ask how frequently individuals engage in political activism, my measure counting the different kinds of protest activity an individual engages in is a manner to assess differences in the relative level of political involvement among respondents. Negative binomial regression is chosen over Poisson regression to account for overdispersion in the data.

The diocese is chosen as the unit for applying fixed effects. Mexico is divided into 91 of these religious administrative units, and they are drawn specifically to match the demographic characteristics of the populations they serve. It is an ideal unit of analysis to control for a wide range of potential geographic, political, religious, cultural, and socio-economic unobservable effects. The diocese is also chosen as the appropriate spatial fixed effect because it is *the* central administrative unit of the Catholic Church.



Bishops have an extraordinary amount of liberty to govern their dioceses as they see fit, and the priests of individual parishes are directly subordinate to the Bishop.

Furthermore, I choose fixed-effects over hierarchical random effects models. A wide array of variables might influence the relationship between the independent variables in the model and political activism by individuals. For example, geography is likely to play a mitigating factor on the effect of decentralization on political activism. It is more difficult for individuals in mountainous areas to collectively organize protests or associational activity than it is for individuals living in relatively flat areas. Similarly, individuals living in urban areas have advantages in organizing over individuals living in rural areas. We can imagine any number of additional unobservable or un-measurable variables that might systematically affect these relationships, including local historical development, regional differences in external trade relations, characteristics of local political leaders, and cultural differences across regions.

Random effects rely on the assumption that the variation between individuals (dioceses in this case) is not in some way influenced by omitted variables. Because random effects do not control for omitted variables bias, one must be certain that a model has been specified to include any and all relationships that could potentially intervene between the independent and dependent variables (Rabe-Hesketh and Skrondal 2012, 530; Allison 2009). As suggested above, such an assumption is untenable for an analysis of individual political activism in Mexico. Fixed effects, on the other hand, control for such omitted variables bias.

Similarly, random effects are desirable if the group variable has been randomly selected from a larger population of groups. For example, if the dataset reflected a random sample of perhaps 20 of Mexico's 91 dioceses, random effects would be appropriate in order to model the random selection effect. In this case, however, nearly all Mexican dioceses are included in the dataset (87 of Mexico's 91 dioceses – or 96%). The dioceses are not a sample but instead reflect what is essentially the full population of Mexican dioceses, making fixed effects appropriate and preferable (Littell et al. 2002).<sup>29</sup>

Finally, I run the majority of my models on only the 2003 and 2005 pooled data. This is because the wording in the questionnaire used by ENCUP changed from 2001 to 2003 in such a way as to potentially introduce bias into the analysis.<sup>30</sup> The questionnaires from the 2003 and 2005 surveys, on the other hand, are identically worded. Additionally, while the 2001 survey does not provide information on an individual's religiosity or religious affiliation, the 2003 and 2005 surveys do. The 2003 and 2005 analyses are restricted to individuals who identified as Catholic, as the effects of Catholic religious variables would presumably only exert their effects on this segment of the population. I include models incorporating the 2001 data, despite the difference in wording, to serve as additional robustness checks.

Continuing with my data analysis, I first present separate descriptive statistics for both the full dataset and the dataset excluding the 2001 survey. Following this brief

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<sup>29</sup> Hausman tests on the data also suggest fixed effects are preferable to random effects.

<sup>30</sup> The 2001 survey asks individuals if they are currently members of associations, whereas the 2003 and 2005 surveys ask individuals if they are, or have ever been, members of associations. Additionally, the 2001 data asks individuals if they have engaged in participatory actions within the last month, whereas the 2003 and 2005 data ask individuals if they have done so within the last year.

discussion, I present modeling results for the protest data. Logistic regression is used to model the general protest and more specific political protest variables, while negative binomial regression is used to model the count of protest activities an individual engages in. I then present logistic regression results for both political associational activity and voting behavior.

### *Descriptive Statistics*

Table 3a below presents descriptive statistics for the entire dataset, while Table 3b presents descriptive statistics for the 2003 and 2005 pooled data. As we can see from the data including 2001, a relatively high number of individuals, roughly 50% of the population, suggested they had engaged in some form of protest or another. However, once we examine political protests, the percentage of the population shrinks considerably to about 20% of the population. The count protest variable suggests significant spread, with a mean of about 1.15 counts of protest per person but a standard deviation of nearly 2. This is suggestive that a negative binomial regression is preferable to Poisson regression. 16.4% of the population engaged in some form of political association, while 82.4% of the population voted, making voting by far the most utilized form of political participation in Mexico. This is unsurprising given the relatively low costs to voting as compared to other forms of political activism.

As for the independent variables, 46.8% of the dioceses in Mexico have no deacons at all. 43.8% are marked by moderate decentralization, and 9.4% are marked by heavy decentralization. The descriptive statistics for religious competition and history are reflective of the natural logs of the original measures. We see from the ethnicity variable

that most of Mexico is relatively ethnically homogeneous, but some municipalities of the country have as many as three major ethnic groups. The average number of effective political parties for each municipality is nearly three.

Table 3a: Descriptive Statistics Including 2001

Variable	Obs	Mean	Std. Dev.	Min	Max
<b>Dependent Variables</b>					
Protest	13108	0.495	0.500	0	1
Political Protest	13088	0.203	0.402	0	1
Count Protest	13108	1.149	2.188	0	14
Political Associations	13123	0.164	0.370	0	1
Vote	13101	0.824	0.381	0	1
<b>Decentralization</b>					
Continuous	13285	0.800	1.742	-0.693	5.833
Dichotomous	13285	0.532	0.499	0	1
Decentralization	13285	0.468	0.499	0	1
No Decentralization	13285	0.438	0.496	0	1
Moderate Decentralization	13285	0.094	0.292	0	1
Heavy Decentralization	13285				
<b>Alternative Explanations</b>					
Religious Competition	13463	0.360	0.238	0.015	1.581
Ethnic Fractionalization	13463	1.102	0.228	1	3.031
Political Competition	13067	2.964	0.550	1.547	5.524
Relative Deprivation	13437	0.825	0.068	0.534	0.951
Ideology	13463	0.349	0.477	0	1
History	13463	1.769	3.196	0	12
<b>Individual Level</b>					
Good Economic Status	13463	0.193	0.394	0	1
Regular Economic Status	13463	0.415	0.493	0	1
Bad Economic Status	13463	0.379	0.485	0	1
Male	13463	0.443	0.497	0	1
Age	13463	40.717	15.371	18	97

Table 3b: Descriptive Statistics Excluding 2001

Variable	Obs	Mean	Std. Dev.	Min	Max
<b>Dependent Variables</b>					
Protest	9211	0.557	0.497	0	1
Political Protest	9192	0.230	0.421	0	1
Count Protest	9211	1.635	2.453	0	14
Political Associations	9222	0.221	0.415	0	1
Vote	9213	0.825	0.380	0	1
<b>Decentralization</b>					
Continuous Decentralization	9163	0.904	1.818	-0.693	5.833
Dichotomous Decentralization	9163	0.543	0.498	0	1
No Decentralization	9163	0.457	0.498	0	1
Moderate Decentralization	9163	0.431	0.495	0	1
Heavy Decentralization	9163	0.112	0.315	0	1
<b>Alternative Explanations</b>					
Religious Competition	9280	0.359	0.236	0.015	1.581
Ethnic Fractionalization	9280	1.103	0.231	1	3.031
Political Competition	8884	3.099	0.545	1.933	5.524
Relative Deprivation	9266	0.825	0.068	0.534	0.951
Ideology	9280	0.395	0.489	0	1
History	9280	1.746	3.167	0	12
<b>Individual Level</b>					
Good Economic Status	9280	0.211	0.408	0	1
Regular Economic Status	9280	0.398	0.490	0	1
Bad Economic Status	9280	0.372	0.483	0	1
Male	9280	0.455	0.498	0	1
Age	9280	40.354	15.237	18	97
No Religiosity	9045	0.225	0.417	0	1
Low Religiosity	9045	0.261	0.439	0	1
Medium Religiosity	9045	0.394	0.489	0	1
High Religiosity	9045	0.121	0.326	0	1
Self-Identified Catholics	9280	0.825	0.380	0	1

As for individual-level characteristics, about 40% of sampled Mexicans self-identify as having regular economic status, followed closely by 38% of sampled Mexicans who consider themselves as having poor economic status. A minority consider

themselves as being well-off economically. 44% of the sample is male. The average respondent was slightly over 40 years old. While the 2001 survey did not identify religious characteristics, according to the 2003 and 2005 pooled sample, nearly 40% stated that they attended church weekly, measured here as medium religiosity. 12.1% attended church more than once a week, nearly 40% attended once a week, 26.1% did so less than once a week, and 22.5% either did not attend church or only did so for special events such as weddings. 82.5% of the country identifies as Catholic. The descriptive statistics for 2003 and 2005 follow a similar pattern as the full dataset. Individuals in 2003 and 2005, however, tended to participate at slightly higher levels, likely due to a slight modification in the wording of the survey questionnaires.<sup>31</sup>

A correlation matrix checking for potential correlations amongst independent variables did not identify particular problems. The only two variables that shared a correlation above 0.4 were ethnic fractionalization and relative deprivation, with a correlation of -0.46.

### *General Protest Results*

Table 4 presents statistical results for the fixed-effects logistic regression results on the general measure of protest. The models suggest religious decentralization, religious competition, ideology, relative deprivation, and economically well-off males increase the odds of engaging in some form of protest behavior. Model 1 presents results for the continuous conceptualization of the decentralization variable. Model 2 presents

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<sup>31</sup> See footnote 30.

results for the dichotomous version, while Model 3 presents results for the categorical version. Model 4 presents the continuous version while including the 2001 data.

The general protest model supports my theoretical contentions. According to the continuous measure of religious decentralization (Model 1), a one unit increase in the natural log of the number of permanent deacons increases the odds an individual participates in a general protest event by a magnitude of about 1.3. The dichotomous model suggests that dioceses with permanent deacons increase the odds that an individual participates in protest by a factor of about 1.7 compared to individuals in dioceses with no deacons. The categorical measure helps to conceptualize the non-linear form of the relationship, where dioceses characterized by moderate decentralization increase the odds of individuals participating by a magnitude of about 1.7. The 10% most decentralized dioceses increased the odds of activism by a factor of about 3.7 compared to individuals in dioceses with no deacons. All are statistically significant at the 99% confidence interval.

Religious competition is also statistically significant. A one unit increase in the log of the effective number of religions is associated with between a 2.2 and 2.4 factor increase in the odds an individual participates, depending on the model. These relationships are statistically significant at the 99% confidence level. In the full three year model, however, religious competition does not have a statistically significant effect. Additionally, dioceses more likely to be open to progressive Catholicism are associated with between a 1.5 and 1.7 factor increase in the odds of political protest, depending on

the model, and all are statistically significant at the 99% confidence level (with the exception of the 2001 model).

Table 4: Fixed-Effects Logit-Regression Results on General Protest

	(Model 1) Continuous	(Model 2) Dichotomous	(Model 3) Categorical	(Model 4) Continuous w/ 2001
VARIABLES	odds ratio	odds ratio	odds ratio	odds ratio
Decentralization (Continuous)	1.336*** (0.0724)	-	-	1.144*** (0.0452)
Decentralization (Dichotomos)	-	1.714*** (0.218)	-	-
Moderate Decentralization	-	-	1.692*** (0.215)	-
Heavy Decentralization	-	-	3.685*** (1.142)	-
Religious Competition	2.355*** (0.692)	2.346*** (0.689)	2.218*** (0.652)	1.282 (0.232)
Ethnic Fractionalization	1.090 (0.186)	1.079 (0.184)	1.124 (0.193)	1.096 (0.133)
Political Competition	1.011 (0.0627)	1.015 (0.0625)	1.017 (0.0629)	1.027 (0.0481)
Relative Deprivation	0.310** (0.174)	0.280** (0.156)	0.280** (0.156)	0.379** (0.156)
Ideology	1.678*** (0.275)	1.760*** (0.291)	1.512** (0.265)	0.861 (0.0852)
History	0.970 (0.0245)	0.967 (0.0243)	0.966 (0.0243)	0.961** (0.0197)
Good Economic Status	1.225*** (0.0826)	1.223*** (0.0824)	1.224*** (0.0825)	1.172*** (0.0610)
Bad Economic Status	0.926 (0.0532)	0.924 (0.0531)	0.924 (0.0531)	0.919** (0.0391)
Male	1.214*** (0.0619)	1.217*** (0.0620)	1.213*** (0.0618)	1.192*** (0.0452)
Age	0.999 (0.00169)	0.999 (0.00169)	0.999 (0.00169)	1.001 (0.00126)
Low Religiosity	1.159** (0.0854)	1.163** (0.0855)	1.168** (0.0859)	-
Medium Religiosity	1.214*** (0.0859)	1.218*** (0.0861)	1.222*** (0.0864)	-
High Religiosity	1.336*** (0.138)	1.344*** (0.139)	1.347*** (0.139)	-
Constant	0.568	0.829	0.958	0.814
Observations	7,073	7,073	7,073	12,501

Robust standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1



Furthermore, relative deprivation has a strong impact on political protest. Each unit increase in the human development index decreases the odds an individual participates in political protest by a factor of 0.3 (every unit decrease in the human development index therefore increases the odds of political protest by a factor of approximately 3.3). Individuals with good economic status were associated with a factor increase of about 1.2 across all models, and this relationship is statistically significant at the 99% confidence level. Males similarly increased the odds of participating in general political protest, as did increases in religiosity. Individuals who went to church more than once a week increased the odds of participating by a factor of 1.4 as compared to individuals who seldom or never go to church.

#### *Political Protest Results*

Table 5 presents the results of the fixed-effects logistic analysis of the political protest measure. The models suggest religious decentralization, relative deprivation, ideology, economic status, and males are positively associated with political protest. According to the continuous measure of religious decentralization (Model 1), a one unit change in the natural log of the number of deacons increases the odds an individual participates in a political protest event by a magnitude of about 1.2. The dichotomous model suggests that dioceses with permanent deacons increase the odds by a factor of 1.7 that an individual participates in political protest. Dioceses characterized by moderate decentralization increase the odds of individuals participating by a magnitude of about 1.7, and the 10% most decentralized dioceses increased the odds of activism by a magnitude of about 1.9. All of these relationships are statistically significant at 99%

confidence interval except heavy decentralization, which is significant at the 90% confidence interval.

Table 5: Fixed Effects Logit-Regression Results on Political Protest

	(Model 1) Continuous	(Model 2) Dichotomous	(Model 3) Categorical	(Model 4) Continuous w/ 2001
VARIABLES	odds ratio	odds ratio	odds ratio	odds ratio
Decentralization (Continuous)	1.214*** (0.0788)	-	-	1.103** (0.0507)
Decentralization (Dichotomos)	-	1.674*** (0.250)	-	-
Moderate Decentralization	-	-	1.671*** (0.250)	-
Heavy Decentralization	-	-	1.927* (0.676)	-
Religious Competition	1.634* (0.477)	1.616* (0.471)	1.605 (0.470)	1.223 (0.255)
Ethnic Fractionalization	1.034 (0.195)	1.032 (0.194)	1.037 (0.196)	1.014 (0.144)
Political Competition	1.067 (0.0792)	1.083 (0.0795)	1.081 (0.0796)	1.106* (0.0619)
Relative Deprivation	0.109*** (0.0674)	0.101*** (0.0621)	0.101*** (0.0622)	0.118*** (0.0568)
Ideology	3.178*** (0.731)	3.341*** (0.775)	3.223*** (0.801)	1.178 (0.151)
History	0.993 (0.0287)	0.991 (0.0286)	0.991 (0.0286)	0.986 (0.0235)
Good Economic Status	1.191** (0.0920)	1.188** (0.0918)	1.189** (0.0918)	1.135** (0.0702)
Bad Economic Status	1.053 (0.0718)	1.051 (0.0717)	1.051 (0.0717)	0.991 (0.0521)
Male	1.306*** (0.0772)	1.310*** (0.0775)	1.310*** (0.0775)	1.268*** (0.0580)
Age	1.005** (0.00193)	1.005** (0.00193)	1.005** (0.00193)	1.006*** (0.00148)
Low Religiosity	1.074 (0.0941)	1.075 (0.0943)	1.076 (0.0943)	-
Medium Religiosity	1.032 (0.0869)	1.035 (0.0872)	1.035 (0.0873)	-
High Religiosity	1.188 (0.140)	1.192 (0.140)	1.192 (0.140)	-
Constant	0.103	0.107	0.111	0.286
Observations	7,021	7,021	7,021	12,481

Robust standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

Unlike the previous model of general protest, religious competition has a mixed impact on political protest. It is positively associated with political protest in Models 1 and 2, but only at the 90% confidence level. It is not statistically significant in Model 3. Dioceses more likely to be receptive to progressive Catholicism increase the odds an individual engages in political protest by a factor of more than three (excluding the 2001 model). Relative deprivation, again, is strongly associated with political protest. Every unit increase in the Human Development Index is associated with a decrease in the odds of political protest by a factor of about 0.1.

Once again, economically well-off individuals are more likely to participate, and males also increase the odds of political protest by a factor of about 1.3 across the models, significant at the 99% confidence level. Older individuals are more likely to engage in political protest. Interestingly, religiosity does not have statistical significance in these models.

#### *Count Protest Results*

Table 6 presents results from the Fixed-Effects Negative Binomial Logit Regression Results on Protest Count. Collectively, the models suggest that religious decentralization, economic status, males, and religiosity have positive and statistically significant effects on individuals' tendencies to engage in successive counts of political protest. The statistically significant positive Alpha value of 1.9 for all models confirms that negative binomial regression is preferable to Poisson regression due to overdispersion of the count data.

Table 6: Fixed-Effects Negative Binomial Logit Regression on Protest Count

	(Model 1) Continuous	(Model 2) Dichotomous	(Model 3) Categorical
VARIABLES	odds ratio	odds ratio	odds ratio
Decentralization (Continuous)	1.133*** (0.0464)	-	-
Decentralization (Dichotomos)	-	1.257** (0.126)	-
Moderate Decentralization	-	-	1.241** (0.124)
Heavy Decentralization	-	-	2.385*** (0.552)
Religious Competition	1.404* (0.285)	1.405* (0.285)	1.382 (0.280)
Ethnic Fractionalization	0.983 (0.129)	0.977 (0.128)	1.003 (0.131)
Political Competition	1.015 (0.0486)	1.018 (0.0489)	1.017 (0.0488)
Relative Deprivation	0.747 (0.316)	0.716 (0.303)	0.743 (0.314)
Ideology	1.159 (0.156)	1.185 (0.161)	1.030 (0.147)
History	1.006 (0.0212)	1.004 (0.0211)	1.004 (0.0211)
Good Economic Status	1.132** (0.0584)	1.133** (0.0585)	1.133** (0.0584)
Bad Economic Status	0.924* (0.0414)	0.924* (0.0414)	0.924* (0.0414)
Male	1.181*** (0.0466)	1.183*** (0.0467)	1.181*** (0.0466)
Age	1.000 (0.00135)	1.000 (0.00136)	1.000 (0.00136)
Low Religiosity	1.120** (0.0644)	1.121** (0.0645)	1.127** (0.0648)
Medium Religiosity	1.070 (0.0590)	1.070 (0.0590)	1.072 (0.0591)
High Religiosity	1.321*** (0.105)	1.320*** (0.105)	1.328*** (0.105)
Constant	0.812	0.952	1.070
Inlpha	1.893*** (0.0563)	1.895*** (0.0564)	1.891*** (0.0562)
Observations	7,098	7,098	7,098

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

The continuous measure of the decentralization variable is positively associated with political activism, statistically significant at the 99% confidence level. Every unit increase in the natural log of the number of permanent deacons increases the expected count of protest activities by a factor of about 1.1. Individuals in dioceses with permanent deacons increase the expected count of protest activities by a factor of 1.3. Individuals in dioceses with some deacons increase the expected count of protest activities by a factor of 1.2, while individuals in dioceses with many deacons increase the expected count by a factor of nearly 2.4 over individuals in dioceses with no deacons. All relationships (except moderate decentralization, which is statistically significant at the 95% confidence level) are statistically significant at the 99% confidence level. Amongst the individual-level indicators, economic status has a positive effect on factor changes of protest counts, as does religiosity. None of the other structural variables have consistently statistically significant effects across the models.

#### *Political Association Results*

Table 7 presents results for the fixed-effects logistic regression results on political association.<sup>32</sup> The results of the model provide weaker but supportive evidence that religious decentralization is associated with membership in political associations, and strong evidence that religious competition, relative deprivation, ideology, history, economic status, gender, age, and religiosity are associated with membership in political

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<sup>32</sup> The model was also run as a fixed-effects negative binomial regression. While not presented here, the results are similar to the fixed-effects logit model. The 2001 survey did not ask respondents about their involvement in political groups and is subsequently not included in the analysis.

associations. Religious decentralization is found to have a significant impact on political association, but the results are not as conclusive as with the protest variables. The

Table 7: Fixed Effects Logit Regression Results on Political Associations

	(Model 1) Continuous	(Model 2) Dichotomous	(Model 3) Categorical
VARIABLES	odds ratio	odds ratio	odds ratio
Decentralization (Continuous)	1.076 (0.0731)	-	-
Decentralization (Dichotomos)	-	1.354* (0.212)	-
Moderate Decentralization	-	-	1.329* (0.208)
Heavy Decentralization	-	-	2.890*** (1.065)
Religious Competition	2.383*** (0.699)	2.348*** (0.688)	2.236*** (0.660)
Ethnic Fractionalization	0.792 (0.145)	0.796 (0.146)	0.827 (0.152)
Political Competition	0.946 (0.0688)	0.951 (0.0690)	0.954 (0.0698)
Relative Deprivation	0.0819*** (0.0510)	0.0795*** (0.0495)	0.0776*** (0.0482)
Ideology	1.755*** (0.358)	1.835*** (0.376)	1.480* (0.329)
History	1.099*** (0.0359)	1.099*** (0.0359)	1.099*** (0.0359)
Good Economic Status	1.211** (0.0951)	1.209** (0.0950)	1.210** (0.0951)
Bad Economic Status	0.873* (0.0606)	0.872** (0.0605)	0.870** (0.0604)
Male	1.526*** (0.0927)	1.529*** (0.0929)	1.523*** (0.0926)
Age	1.014*** (0.00194)	1.014*** (0.00194)	1.014*** (0.00194)
Low Religiosity	1.187* (0.109)	1.187* (0.108)	1.193* (0.109)
Medium Religiosity	1.205** (0.106)	1.207** (0.106)	1.212** (0.106)
High Religiosity	1.528*** (0.186)	1.529*** (0.186)	1.534*** (0.187)
Constant	0.196**	0.174**	0.218**
Observations	7,096	7,096	7,096

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

continuous conceptualization fails to capture a statistically significant relationship. Individuals in dioceses with any deacons increase the odds that an individual is a member of a political association by a factor of 1.4, but this relationship is only significant at the 90% confidence level. The strongest relationship emerges from the categorical conceptualization. Individuals in dioceses with some deacons are 1.3 times more likely to be members of political associations, significant at the 90% confidence level, but individuals in dioceses with heavy decentralization are 2.9 times more likely to be members of political associations, significant at the 99% confidence level.

Religious competition is also found to have a positive impact on membership in political associations, as is relative deprivation, economic status, age, and religiosity. History has the opposite effect as theoretically expected, as the number of combatants in the Cristero War has a positive effect on political association membership.

### *Voting Results*

Finally, the fixed-effects logistic regression model for voting is presented in Table 8. Voting is a relatively low-cost political activity, and religious decentralization is not expected to be strongly associated with voting behavior. This is the case from the model, as indeed none of the structural characteristics of the model seem to be strongly associated with voting. On the other hand, age, economic status, and religiosity all have positive impacts on individual propensities to vote.

### *Discussion*

Overall, I find strong support for Hypothesis 1 that religious decentralization is associated with heightened activity in political protest and political organizations. The

Table 8: Fixed-Effects Logit Regression Results on Voting

	(Model 1) w/o 2001	(Model 2) w/ 2001
VARIABLES	odds ratio	odds ratio
Decentralization (Continuous)	0.925 (0.0640)	0.918* (0.0443)
Religious Competition	1.979* (0.795)	1.161 (0.278)
Ethnic Fractionalization	1.301 (0.311)	1.316* (0.215)
Political Competition	1.016 (0.0837)	1.036 (0.0621)
Relative Deprivation	0.229* (0.172)	0.538 (0.285)
Ideology	1.014 (0.212)	1.275* (0.162)
History	1.054 (0.0383)	1.058** (0.0285)
Good Economic Status	1.252** (0.111)	1.048 (0.0682)
Bad Economic Status	0.961 (0.0744)	0.894** (0.0494)
Male	1.105 (0.0759)	0.981 (0.0483)
Age	1.057*** (0.00390)	1.043*** (0.00251)
Low Religiosity	1.632*** (0.150)	-
Medium Religiosity	2.001*** (0.180)	-
High Religiosity	1.975*** (0.288)	-
Constant	0.988	1.158
Observations	7,074	12,505

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

continuous, dichotomous, and categorical predictor variables for religious

decentralization have consistently significant and positive associations with political

protest, whether through the general protest measure, the political protest measure, or the



count protest measure. While evidence for political associational activity is somewhat weaker and the continuous decentralization variable has no statistically significant relationship, the dichotomous version is significant at the 90% confidence level, and the heavy decentralization categorical variable is positive and significant at the 99% level. It is the only structural variable to show a statistically significant relationship in the count protest models. Finally, as expected theoretically, religious decentralization is not associated with voting behavior.

Hypothesis 2, that individuals in dioceses more receptive to progressive Catholicism should be marked by heightened levels of political activism, receives generally strong support as well. The relationship between ideology and protest is significant in the general protest and political protest models, although it is not statistically significant in the count protest models. It also shows statistically significant and positive effects in most of the political association models.

Additionally, Hypothesis 3 stating that individuals in regions marked by heightened levels of religious competition should engage in higher levels of political activism is generally, though not strongly, supported by the statistical analysis. The relationship is most tenuous with regard to political protest. Religious decentralization is found to be highly significant to general political protest, but was weakly significant with the political protest and protest count variables. On the other hand, it was found to be strongly significant with political associational activity. As the qualitative analysis of the following chapters will make clear, religious competition is not in and of itself a

sufficient condition to prompt political activism, and it poorly explains why indigenous activism failed to coalesce in Yucatán despite the presence of religious competition.

On the other hand, there is little support for the hypothesis that individuals living in areas marked by increasing political competition should be marked by heightened levels of political activism (Hypothesis 4). Indeed, this variable does not show up as significant in any of the models. As the qualitative discussion of the following chapters makes clear, the impact of political competition on activism is mixed. In many cases, increased party competition actually decreased incentives for some people to engage in political activism as both the PRI and PAN political parties were alleged to have punished vocal opponents upon taking power.

Similarly, there is little positive evidence for the assertion that individuals in regions less affected by the Cristero War should be marked by heightened levels of political activism (Hypothesis 5). The only models where it consistently comes up as significant is in the political association model, and it is in the opposite of the expected direction. In the case of this statistical analysis, there is little support given to the contention that Church actors at the periphery of Mexican politics during intense Church/state animosity had more room to prompt political engagement from their laity.

Economic deprivation, on the other hand, is generally found to influence the propensity of individuals to engage in protest and associational activity, supporting hypothesis 6 that individuals in less-developed regions are more likely to engage in higher levels of political activism. It is found to be statistically significant in all of the protest models with the exception of the count model. However, like religious

competition, it is not sufficient to spur political activism on its own, and individuals must also have organizational capacity to express their demands, as the case study of Yucatán in particular will also demonstrate.

Finally, little support is given for Hypothesis 7 that individuals in regions marked by higher levels of ethnic homogeneity should be marked by heightened levels of political activism. Ethnic fractionalization fails to predict either protest or associational activity in any of the models. This is because, as argued throughout this dissertation, theories of ethnic fractionalization fail to take account of the social institutions in which ethnic interactions are embedded. Ethnic fractionalization, on its own, accordingly sheds little light on political activism.

As for individual-level variables, it is unsurprising that gender, income level, and religiosity (and less consistently age) have positive effects on the odds that individuals participated in some type of political activity. These individual effects have been well-demonstrated in the past. At the same time, results for religiosity support my contention that religiosity has a pro-social effect making a minority of individuals more likely to cooperate in the production of political activism. Highly religious individuals nearly always increased the odds of engaging in political activism across my models.

#### *Cross-Validation and Re-Sampling*

In order to ensure that the data has not been over-fitted by the model, this analysis runs cross-validation tests while also re-running the model multiple times with re-sampled data from the original dataset. When models are overfitted to the data, the model cannot be expected to explain new observations. Cross-validation subsequently

involves developing estimates of prediction error for the model with independent datasets sampled from the original dataset. This is done in order to evaluate the model's ability to predict new observations.

With K-fold Cross-Validation (sometimes referred to as H-fold Cross-Validation), all observations in the dataset are used both to develop and validate the model. Using the Crossfolds Stata module, I split all of the observations of my dataset into 5 equally-sized mutually exclusive subsets. The model is estimated using 4 of these subsets while leaving one out, and this procedure is repeated so that each subset is excluded exactly once. Using the parameter estimates from the 4 training subsets, the root mean squared error is calculated for the excluded observations. The result is five separate estimates of the root mean squared error for each of the five excluded samples. If the model has not been over-fitted, the difference between these root mean squared error estimates should not be large (Vittinghoff et al.2012, 396-400). As Appendix Model 1 in Appendix D indicates, the root mean squared error does not vary largely between excluded sets for the general protest, political protest, count protest, or political association models.<sup>33</sup>

As a further test of the ability of the model to explain additional observations, Appendix Tables 2 through 5 in Appendix D demonstrate tests of each parameter with repeated samples of the population. Model 1, the successive two-thirds samples model, randomly sampled two thirds of the population, and model parameters were estimated for the sampled population. This procedure was repeated ten times, and mean odds ratios and standard errors are reported across the ten runs. Model 2 reflects estimates from bootstrap

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<sup>33</sup> All models, except political association, were run on the continuous version of the decentralization variable for the pooled 2003 and 2005 samples. Political association was run on the categorical model.

model runs where a sample of 2/3rds of the population was randomly drawn to construct a new population, and individual observations could be drawn multiple times. This procedure was repeated 50 times. As can be viewed from Appendix Tables 2 through 5, results do not systematically depart from the models presented here, though standard errors generally tend to be larger.

### *Conclusion*

This statistical analysis has demonstrated that religious decentralization, ideology, relative deprivation, and to a lesser extent religious competition all have positive impacts on the odds that individuals engage in political activism. On the other hand, church/state histories, ethnic fractionalization, and political competition do not appear to be associated with political activism in the Mexican context. Such an analysis demonstrates that religious considerations are important. Empirical credence is lent to theories that suggest that ideology is an important determinant of activism. At the same time, religious competition may compel religious leaders to be more attuned to the religious needs of their laity and to become more concerned with advocating for their political and/or economic concerns.

However, neither religious competition nor ideology explains how ordinary individuals overcome collective action problems, at a micro-level, to engage in political activism. Most Mexicans are not marked by extraordinary levels of religiosity (attending Church more than once a week), yet large political movements manage to emerge across the country. The efforts of religious elites to advocate for social causes do not speak to capacities of individual Mexicans to organize themselves and lobby for political change

on their own behalf. Only by examining how religious structure overcomes barriers to activism at a micro-level can we understand why religion so often seems to prompt large-scale social movements that are made up of more than simply religious elites or the most religiously faithful. As this analysis demonstrates, religious decentralization makes them more likely to engage politically.

This analysis, however, can only demonstrate that there is a general and positive relationship between religious decentralization and political activism. To fully explore the mechanisms of how this occurs, it is necessary to examine the posited causal mechanisms of the relationship with an in-depth analysis of qualitative case histories. Accordingly, I examine three cases, two where religious decentralization prompted political activism and one where it did not, to facilitate a controlled qualitative comparison based on variance. Chapter 5 presents religious decentralization in Chiapas. Here, religious decentralization is demonstrated to have prompted political activism by indigenous communities. Decentralization created heightened contributions to religious material club goods, increased reciprocal interactions, and created an organizational base from which political activism could emerge. Chapter 6 explores Yucatán, where the lack of religious decentralization is marked by few investments in religious club goods, few networks of reciprocal interaction, few cross-communal organizations, and accordingly little political activism by indigenous communities. Finally, Chapter 7 examines the relationship between religious decentralization and political activism in a non-indigenous setting.

## Chapter 5

### THE DECENTRALIZED CATHOLIC CHURCH IN CHIAPAS

The previous chapter established a general relationship between religious decentralization and political activism through quantitative investigation. While statistical analysis can point us to the existence of broad relationships, qualitative analysis maintains a comparative advantage in testing whether the mechanisms posited by the theory operate as specified (Gerring 2007). In the context of this study, in-depth qualitative analysis can examine how religious decentralization is connected to political activism. Chapters 5 and 6 accordingly offer a controlled qualitative comparison between the Mexican states of Chiapas and Yucatán. Chapter 5 examines Chiapas, a state that has seen significant indigenous political activism. Chapter 6 examines Yucatán, a state that has seen little indigenous activism. To assess the ability of the theory to explain political activism in a non-indigenous setting, Chapter 7 also examines the relationship between religious decentralization and political activism in Morelos.

This dissertation argues that the decentralization of authority by religious institutions to the laity creates heightened capacities for individuals to engage in political activism. If this theory is correct, I should first be able to identify the decentralized decision-making, monitoring, and sanctioning of material religious club goods in Chiapas, a case that has been marked by high levels of political activism. Decision-making allows local communities to autonomously set their own agendas for action. This has a spillover effect into political activism by giving individuals a forum to communicate and develop solutions to their own social and economic problems.

In order to conclude that a religious institution has decentralized monitoring and sanctioning to laity, we should first see that the religious institution has provided the intellectual impetus for the provision of material club goods. The religious institution should provide resources to the laity assisting them to produce these goods. It should also put monitoring and sanctioning directly into the hands of the laity. The laity should have a means to supervise the material contributions of club members, and non-participating members should generally be excluded from material club benefits. Church clergy should have minimal intervention in these monitoring and sanctioning decisions. If the posited mechanisms of the theory are correct, more individuals should be willing to interact and contribute to the production of these goods as the material benefits of the club grow. This should prompt increasing reciprocal interactions across the religious club as well as the development of an effective organizational base that emerges temporally prior to political activism.

Also, my theoretical account takes religious commitment seriously. It suggests a religiously-committed minority core of individuals engage in pro-social cooperative behavior at critical junctures. This cooperation prompts further cooperation from others, and these individuals play an important role in facilitating the effective provision of religious club goods. Finally, my theory cannot account for the specific character of activism because local control allows communities to develop a multitude of trajectories for political action. Precisely because control has been decentralized to a local level, we should see that individuals pursue political options that are unexpected and possibly even undesired by religious leaders.



To test the theory against a case that has experienced political activism, this dissertation examines Chiapas. In 1994, the Zapatista insurgency launched a surprise attack and seized control of several cities throughout the state in response to pervasive economic and social marginalization experienced by indigenous communities (Mattiace 2003, 18 - 20; Kovic 2004, 190, 201; Collier and Quaratiello 2005, 45; Interview 42; Interview 29). Though the mountainous terrain and poverty of Chiapas favor insurgency (Fearon and Laitin 2003), the vibrant and engaged network of civic associations that has developed throughout the state is more puzzling (Kovic 2005, 2-3; Mattiace 2003; 3-5). Chiapas is not a likely candidate to support civil society. It is marked by intense poverty, geographic isolation, and ethnic fractionalization (Gómez Moreno et al. 2010, 24-26). However, the Catholic Diocese of San Cristóbal de las Casas in Chiapas is widely recognized as playing a key role in overcoming these barriers and prompting collective action throughout the region (Kovic 2005, 7-8; Trejo 2009; Yashar 2005, 74; Floyd 1996; Domínguez 2004, 397; Womack 1999).

This study uses the Diocese of San Cristóbal de las Casas to test a micro-level theoretical account of religion's impact on collective action by the laity. I conducted twenty-five interviews in Chiapas from 2011 to 2012 with members of the Church hierarchy, civic activists, charitable volunteers, members of productive cooperatives, church-goers, government officials, and citizens in order to link the institutional structure of the Catholic Church in Chiapas to individual incentives to engage in political activism.

As discussed in further detail below, I find that the Diocese of San Cristóbal de las Casas in Chiapas decentralized monitoring, sanctioning, and decision-making

authority to the laity beginning in the 1960s. Decision-making was decentralized as the laity were given democratic voice in the Diocese and as locally-selected catechists (lay instructors of the Catholic faith) and deacons were allowed to select their own themes for discussion. These lay pastoral workers subsequently drove an agenda focused on ameliorating social and economic disparities. Local monitoring and sanctioning capacities were directly provided by the Catholic Church. To foster the hierarchy's agenda of welfare provision, the Diocese drove the construction of hundreds of local producer cooperatives across the region, and it provided a common model of decentralized governance for them. Once established, clergy completely ceded control of these cooperative organizations to the laity. The laity monitored material contributions by evaluating production quotas and financial contributions. Non-participants were sanctioned by the cooperative through exclusion from the health, technical, and welfare benefits of membership, and individuals received payment in proportion to their productive contributions.

Clergy provided critical technical and organizational assistance to create these cooperatives, while lay catechists and deacons generally held leadership positions within them. These theologically-committed individuals cooperated in the production of material club goods and enabled further contributions from others.

As these cooperatives became increasingly effective in providing excludable club goods to their members, more and more individuals joined. The cooperatives helped foster increasing reciprocal interaction across the Diocese. Individuals that had never interacted in the past worked cooperatively to provide material club goods as these

organizations expanded and networked disparate communities. These processes created a powerful organizational base that spawned large, regional, and political organizations such as Quiptic Ta Lecubtesel and the Union of Unions beginning in the mid-1970s.

An extraordinary number of civic groups developed with their own autonomous agendas for action, and the laity directed political activism far afield from the ideological prescriptions coming from the Diocese. While the Diocese maintained a commitment to non-violent forms of action, Church decentralization created the organizational infrastructure enabling groups such as the Zapatistas to take up armed resistance against the state.

This chapter opens with a brief description of Chiapas. It then goes on to discuss the development of political activism throughout the state. It continues with an in-depth discussion of the Catholic Church's decentralization of monitoring, sanctioning, and decision-making authority and how this decentralization led to the development of an organizational base enabling political activism. Finally, a variety of alternative explanations might also explain the development of political and indigenous activism in Chiapas. This chapter examines the impacts of economic development, the influence of PRI corporatist policies, the opening of Mexico's political space, Chiapas' ethnic characteristics, the influence of religious theology, the influence of Protestant competition, and the history of church and state relations on political activism in Chiapas.

### *The State of Chiapas*

Chiapas is marked by both low-lying coastal plains and mountainous terrain. The western portion of the state, encapsulated by the Catholic Dioceses of Tapachula and the

Archdiocese of Tuxtla Gutiérrez, tends to be flatter than the rugged, mountainous territory to the east encapsulated by the Diocese of San Cristóbal de las Casas. This study examines the eastern Diocese of San Cristóbal de las Casas, where 80% of the indigenous population of Chiapas resides and where the majority of indigenous activism has occurred (Harvey 1998, 70).

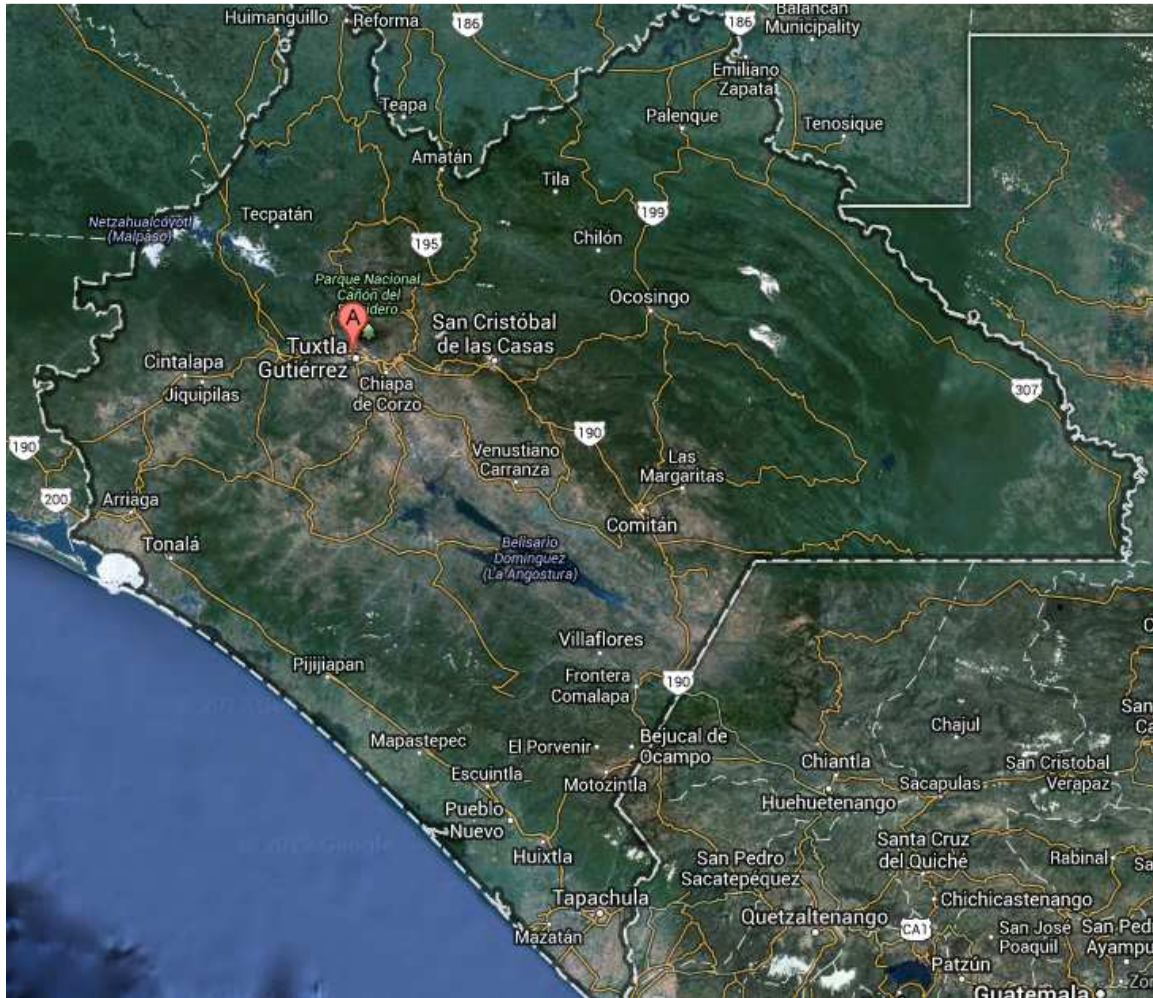


Figure 6: Map of Chiapas “Chiapas, Mexico.” Map. Google Maps. Imagery © 2013 TerraMetrics, Map data © 2013 Google, INEGI. Accessed 11 June 2013. Web.<sup>34</sup>

<sup>34</sup> See Appendix F for Google Maps’ rules and guidelines for use of copyrighted content.

Chiapas has been geographically isolated from the rest of Mexico, giving it a unique cultural and political history. Its mountainous terrain has made it more difficult for the Mexican state to assert authority. Chiapas experienced ethnic conflict between the landed mestizo establishment and indigenous communities during the 19<sup>th</sup> century, and the reforms of the Mexican revolution were unevenly implemented (Womack 1999, 87-96, Collier and Quaratiello 1999, 28-29). Like Yucatán, it has developed at the periphery of Mexican national politics.

The municipality of San Cristóbal de las Casas has a population of around 132,000 (INI-CONAPO 2000) and is located in the central highlands of Chiapas. The level of Protestant competition within urban San Cristóbal is less than throughout the rest of the Diocese, with approximately 78% still conforming to Catholicism and most of the rest up belonging to a variety of Protestant sects (INI-CONAPO 2000). Approximately 31% of the population of the city speaks an indigenous dialect, and 34% of the population lives in poverty. While San Cristóbal tends to be moderately less indigenous, more affluent, and more Catholic than the rest of the Diocese, many of the organizations that developed throughout the Chiapan countryside maintain an organizational presence in San Cristóbal.

#### *Civic and Indigenous Activism in Chiapas*

Chiapas experienced 2,382 “protest” events (both violent and non-violent) from 1975 to 2000. Yucatán, by contrast, experienced 60 over the same time period.<sup>35</sup> The most famous act of protest occurred in January of 1994 when the Zapatista Army of

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<sup>35</sup> See footnote 6 of Chapter 2 for a discussion of the protest measure.

National Liberation (EZLN), more commonly referred to as the Zapatistas, launched a surprise attack and seized control of several cities throughout Chiapas (Mattiace 2003, 18 - 20; Kovic 2004, 190, 201; Collier and Quaratiello 2005, 45; Interview 42; Interview 29). While the Zapatista uprising is well-known, the EZLN is not representative of the full extent of civic activism in the state. Chiapas, and more particularly the Diocese of San Cristóbal de las Casas, is marked by a vibrant and engaged network of civic associations (Kovic 2005, 2-3; Mattiace 2003; 3-5). This larger social movement pushed for land and social rights (Manaut et al 2006, 136-137). By 1994, “indigenous communities from various parts of Chiapas had put together the most successful network of local and cross-regional peasant indigenous organizations in the entire country” (Trejo 2004, 227).

According to many of my interview respondents, organizations have experienced dramatic growth in Chiapas. “Now, the entire indigenous population, or the majority, can be found organized in some way or another, for production, for economic issues, for the defense of their rights, or for politics ... Before it was thought that one could manipulate the information and the will of the people, but now it’s very different” (Interview 5). These groups have grown since the 1970s and 1980s. “Since the 1970s and 1980s ... organizations have arrived to Chiapas. They began to work with communities to generate political and social acts” (Interview 29). As one interviewee succinctly put it, “many of these organizations are now involved in the struggle for power” (Interview 42).

A great deal of the scholarly literature suggests Bishop Samuel Ruiz played a pivotal role in enabling the development of indigenous activism throughout Chiapas

(Womack 1999; Harvey 1998, Trejo 2009; Mattiace 2009; Mattiace 2003; Norget 2004; Kovic 2004; Collier and Quaratiello 2005; Washbrook 2007). “The key role of Roman Catholicism...features in nearly all accounts of social processes and events” (Domínguez 2004, 399). But even if the ideological conversion of Bishop Ruiz to liberation theology (Womack 1999; Harvey 1998) or his attempt to contain the growth of Protestantism (Trejo 2009, Collier and Quaratiello 1999, 55-56) help to explain why Ruiz became an advocate of indigenous rights, we are still left wondering why, at a micro-level, the rank-and-file indigenous individuals themselves were able to overcome the costs of political organizing and fashion their own political movement. I contend that in order to do so, we must understand how the Diocese decentralized monitoring, sanctioning, and decision-making authority to the local laity.

*Decentralization in the Diocese of San Cristóbal de las Casas*

Decentralization in the Diocese of San Cristóbal de las Casas was undertaken by Bishop Samuel Ruiz beginning in the 1960s. Decision-making authority has been given to the laity through democratic opportunities to participate in diocesan decisions and by giving lay catechists and deacons agenda-setting abilities within their communities. Monitoring and sanctioning have been provided by productive community cooperatives created by the Diocese and its pastoral workers to provide material welfare to Catholic parishioners.

Before the arrival of Bishop Samuel Ruiz Garcia to the Diocese of San Cristóbal de las Casas, the Diocese was marked by a hierarchical relationship between priests and parishioners, the indigenous population was poorly understood by clergy, and the Church

was aligned with landed elites (Trejo 2009, 336; Kovic 2005, 48; Interview 29; Interview 45). Priests only occasionally ventured out into the countryside to perform baptisms and marriages (Womack 1999, 128). As one Chiapan priest described, “the few priests in these communities never came to spend time with the communities themselves. They only went to the master’s home” (Interview 45). Another mentioned that when he arrived in Chiapas in the 1960s, it was with his camera to “photograph the Indians who dressed strangely. This was the mentality of the Church [at that time] – that we were going to see strange people” (Interview 29).

Lay responsibilities were limited. There were 200 catechists (lay instructors of the Catholic faith), and their manual for instruction dated back to the sixteenth century, was written entirely in Spanish, and detailed only the basics of the Catholic creed (Womack 1999, 128-130). Early in his tenure, Bishop Ruiz ordered the creation of new catechist schools.<sup>36</sup> However, catechists only received training in Spanish. Their instruction was “doctrinaire, authoritarian, and on the local premises of Indian inferiority” (Womack 1999, 130). Catechists were selected for instruction by the Diocese and treated as “passive receptors of evangelization” (Kovic 2005, 49; Floyd 1995, 155). They often had to travel significant distances to receive their training (Interview 31). Accordingly, these catechists often reproduced vertical power relations within their own communities (Harvey 1998, 72).

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<sup>36</sup> The Jesuit missions arrived in 1958 in Bachajón, just before Ruiz took control of the Diocese (Womack 1999, 130; Interview 46). Ruiz then opened five catechist schools (two in San Cristóbal, one in the existing Jesuit mission of Bachajón, one in Comitán, and one in Ocosingo) between 1962 and 1963 (Womack 1999, 25-26).



Though initially marked by conservatism (Womack 1999, 25), Ruiz was one of the few Mexican bishops to be influenced by liberation theology, a powerful movement in Latin American Catholicism. Liberation theology suggests the Church must be an active promoter of human rights, express a preferential option for the poor, and emphasize political action (Kovic 2005, 49 - 52, Planas 1986, 6-7; Prokopy and Smith 1999, 13; Betances 2007, 53). It developed from ideological undercurrents at the Second Vatican Council, where Bishop Ruiz participated from 1963 to 1965, and from the Council of Latin American Bishops' conference in 1968 (Harvey 1998, 72). Ruiz was deeply moved by the Church's commitment to increase lay participation and focus on the poor (Womack 1999, 25-27). "[Ruiz] arrived when he was 35 years old. He arrived with a traditional way of evangelizing ... he learned that the Church has to develop programs to look after health, land rights, and to go against poverty" (Interview 56).

Informed by his experience at the Second Vatican Council, the extraordinary poverty he found while touring the countryside, and the unenthusiastic response from the laity he received to the hierarchical model of catechism (Womack 1999, 25-27, 29), Ruiz reorganized the Diocese of San Cristóbal de las Casas. Though the Diocese had originally encompassed the entire state of Chiapas, Ruiz divided it into what would eventually become three separate dioceses. One new diocese encapsulated the southwestern zone of Tapachula while another encompassed the northwestern zone of Tuxtla Gutierrez. Bishop Ruiz took over the Diocese of San Cristóbal de las Casas, which was now limited to serving the predominantly poor indigenous communities in the eastern half of Chiapas

(Harvey 1998, 69-70), and he further subdivided it along linguistic lines into 6 pastoral zones with the intent of making it responsive to local needs (Kovic 2005, 50).<sup>37</sup>

### *Decision-Making*

Decentralized decision-making allowed local communities to develop their own autonomously determined agenda for action within the religious institution. The laity were able to democratically select their own lay leaders, and these leaders were given the autonomy by the Church to develop their own themes for discussion. This played an important function in providing communities with a public forum to communicate and discuss their social and economic concerns.

A key focus of diocesan reorganization was on making decision-making a more democratic process by the laity. Newly formed pastoral assemblies provided parishioners with an opportunity to express their opinion over Church programs, and pastoral councils consulted with the Bishop to make decisions (Interview 81; Interview 56).

Several Church officials explained to me the continuing commitment the Diocese has to lay participation in decision-making. “The decisions of the Diocese do not only come from the Bishop. It’s the assembly” (Interview 56). “We have every 12 months a meeting with the pastoral diocesan council that represents the seven pastoral zones. We consult with them to make decisions” (Interview 81). “One very important thing that Samuel Ruiz did ... they [pastoral workers] ask all the communities for their opinions ...

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<sup>37</sup> Some accounts suggest Protestant competition prompted decentralization in Mexico as Catholics sought to deter religious conversion (Trejo 2009; Collier and Quaratiello 2005, 61). However, decentralization by the Catholic Church is likely a result of a wide range of factors, including religious competition, theology, managerial inclinations of individual bishops (Camp 1997, 276), and organizational need. Religious competition or ideology alone cannot account for it.

They hear the people – it’s democratic” (Interview 56). Rather than attempting to force through their own agenda, as did many liberationist clergy across Latin America and Mexico (Levine 1988, 243; Chand 2001, 191), consultation with the laity allowed local communities to form their own religious agenda predicated on their local needs.

Furthermore, the Church in Chiapas made itself more accessible to its parishioners by integrating indigenous culture into the liturgy. Pastoral teams were encouraged to learn indigenous languages, the Bible was translated into local dialects, Mayan customs and beliefs were incorporated into mass, and the Gospel was reinterpreted through indigenous communities’ unique cultural perspective (Trejo 2009, 338-339; Kovic 2005, 58; Interview 1; Interview 56). As one priest described, it is “important to know the language, to know the culture and from there conduct a process of ministry in the communities” (Interview 46). Such moves made it possible for indigenous individuals to engage effectively within the religious institution.

The Diocese also allowed communities to democratically select their own catechists rather than having them selected by the hierarchy (Floyd 1996, 156; Interview 4; Interview 45; Womack 1999, 32). Furthermore, instead of passively instructing students in fundamentals of the Catholic faith, catechists were encouraged to actively develop their own themes for reflection (Womack 1999, 30, 132-134; Harvey 1998, 73). One catechist I interviewed explained that his responsibilities included “having the lesson, leading reflection, and sharing our experiences” (Interview 4). These experiences came to center on demands for land, the mediation of community disputes, and means to promote “the production of coffee and handcraft” (Interview 56). Indigenous catechists

subsequently selected human rights, agricultural production, and political analysis as themes for discussion (Kovic 2004, 195; Trejo 2004, 144).

The Diocese also created permanent deacons. Deacons are similar to catechists in many respects, but they are given additional authority to perform sacramental functions such as baptisms and weddings (Trejo 2009, 339; Interview 56; Harvey 1998, 74). One must have served as a catechist for five years before becoming a deacon (Interview 81; Interview 45).<sup>38</sup> “We have 320 deacons and they are very important in evangelization ... They aid in celebrations of baptism, marriage, death rites, prayer for the sick, celebrating the Word of God on Sundays and distributing communion. They are assigned in their own communities, and they live with their families. They are primarily *campesinos* [peasants] in rural areas” (Interview 81). Communities chose their own deacons from among themselves (Interview 31).

While similar, there is an important distinction between deacons and catechists that makes using the number of deacons in a diocese a superior quantitative measure of decentralization to using the number of catechists.<sup>39</sup> As the following chapter makes clear, catechists in Yucatán have few agenda-setting opportunities. Even within Chiapas, early catechists simply related religious teaching to their communities as they had been instructed by clergy. The mere existence of catechists does not signify decentralization. The creation of permanent deacons, on the other hand, is considered to be a radical ecclesial development. It is a pronounced sign that the Church has decentralized authority

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<sup>38</sup> They must also be married and typically serve with their spouses (Interview 46; Interview 31).

<sup>39</sup> See the statistical analysis of Chapter 4.

to the laity precisely because these individuals are given further sacramental responsibilities previously reserved to priests. Within Chiapas, deacons took on the most important community positions (Trejo 2004, 202). The number of deacons, as a variable, is subsequently a superior general quantitative measure of decentralization even though both catechists and deacons had important responsibilities in Chiapas.

Together, the 8,000 catechists and 300 deacons located throughout the Diocese of San Cristóbal de las Casas became important leaders in their communities by organizing local Bible study groups, aiding in pastoral decisions, mediating local conflicts, holding prominent positions in civic organizations, and directing economic cooperatives (Mattiace 2003, 18; Kovic 2004, 188-193; 201; Harvey 1998, 74; Interview 56; Interview 4; Interview 81).

In short, decentralized decision-making allowed the laity to set an agenda for action in the Diocese based on their own economic and social concerns rather than one implemented from above by the hierarchy. However, decision-making alone does not speak to how the laity were able to build an organizational base leading to political activism. To understand that, we must understand how the Diocese allowed for decentralized monitoring and sanctioning through the provision of its material religious club goods.

#### *The Catholic Church, Cooperatives, Monitoring, and Sanctioning*

The Church provided decentralized monitoring and sanctioning capacities to the local laity through the economic cooperatives it developed throughout the 1960s and 1970s. These Church-created organizations facilitated the monitoring and sanctioning of

material religious club goods by the laity. This section describes the institutional Church's critical role in creating the cooperatives and how monitoring and sanctioning was decentralized to the Catholic laity. Increased material benefits emerging from these local organizations encouraged increased reciprocal interactions across the region and led to the development of an organizational network of local productive groups. This chapter also demonstrates the important role of pro-social ideologically-committed pastoral workers who, in conjunction with decentralization, provided kindling for sustained cooperation in the production of religious club goods. Finally, decentralization implies that clergy make few attempts to interfere with lay monitoring and sanctioning decisions, and I show this has been the case in Chiapas.

### *The Church and Cooperatives*

As part of his pastoral project, Bishop Ruiz wanted to provide his parishioners with increased material services. While the Diocese might have pursued any number of options to accomplish this (including charitable organizations run by church clergy or religious orders), the institutional Church invested substantial effort into developing lay-managed economic cooperatives across the region. Clerical pastoral workers provided technical and organizational assistance to get cooperatives started (Trejo 2009, 338; Interview 45; Interview 17; Interview 2; Interview 1), while lay catechists and deacons directed and initiated them (Harvey 1998, 62; Harvey 1990, 192). "Throughout the 1960s and early 1970s, Ruiz actively encouraged the creation of hundreds of economic and social cooperatives" (Trejo 2009, 338).

The Church designed these cooperatives along an organizational model borrowed from European cooperativism. They emphasized “direct participatory democracy, equity, and mutuality” (Hernández and Nigh 1998, 141). While it is easy to conjure images of idealized socialist societies where all freely share and give, these cooperatives “adapted themselves to efficient functioning in the capitalist system” and used production techniques predicated on reciprocity (Hernández and Nigh 1998, 141 -142).<sup>40</sup> These cooperatives were a common feature in many similarly decentralized Christian base communities in Catholic dioceses across Latin America (Levine 1988, 253).

Church clergy provided technical assistance that was vital to the functioning of these cooperatives (Kovic 2005, 79-80; Interview 45, Interview 1; Interview 42). One priest explained that the role of Church officials in one particular agricultural cooperative was to provide “education, food supplies, corn, [and advice regarding] where to get the mills to grind corn and make tortillas” (Interview 46). Catholic commissions organized seminars among local producers to teach sustainable farming practices (Hernández and Nigh 1998, 141).

The cooperatives were directed and initiated by lay catechists and deacons (Harvey 1998, 71; Womack 1999, 32; Kovic 2005, 59; Trejo 2009, 338; Harvey 1990, 192; Interview 46). Depending on each community’s specific needs, cooperatives

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<sup>40</sup> The Mam productive cooperative analyzed by Hernández and Nigh (1998) and Hernández and Renato (2001) in a subsequent work falls under the territorial purview of the neighboring Diocese of Tapachula in the Sierra Madres of western Chiapas. Here, decentralization was less encouraged. However, the proximity of the Mam to the decentralized Dioceses of San Cristóbal de las Casas and Huehuetenango (in Guatemala), and the Archdiocese of Oaxaca allowed several priests in Tapachula to develop productive cooperatives in the same manner as those developed in San Cristóbal. Church-sponsored cooperative workshops are obligatory for new members in many cooperatives throughout Chiapas (Hernández and Renato 2001, 164; Hernández and Nigh 1998, 141).

focused on agricultural production (particularly coffee), transportation, financial savings, health, and women's issues (Trejo 2009, 338, Interview 1, Interview 2, Interview 17). As one priest related concerning cooperatives in his own community, "the deacons and catechists direct a coffee cooperative and they have had significant success" (Interview 46).

It is important to reiterate this point. The institutional Diocese created these cooperatives. It provided the intellectual impetus for their creation through lay catechists and deacons (Eisenstadt 2011, 86; Harvey 1998, 71). Church pastoral workers established their decentralized governance structures and provided the technical and organizational assistance that was necessary to start them. As one Catholic pastoral worker assigned to a Catholic mission related, "the role of the Mission was to be the initiator of cooperatives in the community" (Interview 45).

### *Monitoring and Sanctioning*

As cooperatives were established, control over their administration was completely given to the local laity (Interview 45; Interview 17; Interview 30). The cooperatives determined their own agenda for the material goods to be provided (Interview 1; Interview 2). A single cooperative may have been comprised by dozens of communities, but responsibility for monitoring and sanctioning occurred locally by the laity.

"These are internal agreements of each group ... They have their ways to assure production, but it's within each [local group]. One example to ensure that each person is doing his or her part: in each community there is a control, whether it's a daily quota of



work to be produced or it's a financial contribution. There are ways to observe this, but it is the responsibility of each community. They correct, advise, and counsel. Members always receive benefits so long as they contribute to the organization. If they don't comply, they are left out" (Interview 43).

Other communities embedded an elderly couple with younger workers to ensure the work was done properly (Interview 46). Whatever form they chose, the communities had the capacity to monitor the productive output of members.

Sanctioning involved the parceling of material resources. Those who produced more received a larger portion of the profit from the sale of collectively produced products (Interview 30; Interview 43; Interview 17; Interview 83). "Those who work more receive more in the production of what they do" (Interview 30). "Obviously those who produce more receive more" (Interview 17). Sanctioning was further characterized by exclusion from a variety of services cooperatives provided for their members, including international marketing, technical assistance, consultations, and variety of health and educational benefits (Interview 83; Interview 17; Interview 30). For the most part,<sup>41</sup> these services were only available to members, and, as mentioned, membership required productive or financial contributions (Interview 83, Interview 1, Interview 43). "The services are not for the entire community. They are only for members." (Interview 83). "Members always receive benefits so long as they do not leave" (Interview 43). As

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<sup>41</sup> While many cooperatives restricted education and health benefits to their members, some provided them to non-members within their communities. At the same time, preferential access to credit, technical assistance, market information, preferential commodity pricing, and profit shares was restricted to members. The democratic governance structures of these cooperatives also made them eligible for excludable Fair Trade benefits such as price floors, credit, and additional technical assistance (Hudson and Hudson 2004; Raynolds et al. 2004; Interview 17).

one member of the clergy who was instrumental in the development of several of these early cooperatives suggested: “If there are rights, there must be obligations” (Interview 1).

The resultant decentralization prompted heightened contributions to religious club goods, exemplified by increased production by local cooperatives. As predicted by the model, the material benefits provided by the lay-run cooperatives prompted heightened club goods production, thereby creating heightened incentives for individuals to participate. These cooperatives became economic engines of their communities. As one priest recalled, “there were several cooperatives that collaborated with the economies of the communities. Right now there is a cooperative of artisans who have a wonderful embroidery that sustains a group of women in the cooperative. There is another cooperative of honey and another of coffee” (Interview 46). Cooperatives throughout the region thrived (Rus et al 2003, 12) due largely to their decentralized governance structures. As one cooperative organizer emphasized, these organizations generally fail when they are governed in a centralized manner. For cooperatives to work, communities must have autonomous control (Interview 71).

Many individuals were drawn by the material rewards the cooperatives increasingly provided. “They see the fruit that comes from being organized, and this creates more cooperation and more work” (Interview 17). A pastoral worker told me how there was a cooperative project involving the production of pork, “and I heard that 1 or 2 [families] didn’t want to enter into it when it was started. They had their reasons, ... but since then they have joined ... because they see the benefit of the work, they see the

gain” (Interview 1). “The Church tells you that you have to help ... but on the other hand it’s also seeing the benefits that the organization starts to provide in the management of the land ... it’s seeing the fruit of the organization that prompts more cooperation and more work” (Interview 17). By contrast, if cooperatives struggle to produce or fail to provide their members with tangible material resources, “the interest of producers is lost” (Interview 83).<sup>42</sup>

Despite their origins within the Catholic Church, cooperative membership was not restricted to Catholics (Interview 1; Interview 30; Interview 17). Drawn by material benefits, some Protestants came to labor in these groups and were generally welcomed so long as they worked (Interview 1; Interview 43). Still, many Protestants stayed away because they were uncomfortable with the cooperatives’ Catholic founding. In reality, these cooperatives were principally Catholic (Womack 1999, 32; Interview 81; Interview 17).

Initially, these cooperatives were small and local in character (Levine 1988, 253). However, the cooperatives expanded and eventually encompassed many communities, increasing the level of reciprocal interactions across small villages and towns. Many of the cooperatives are now constituted by dozens of smaller communities. As discussed by my interview respondents, these cooperatives link communities and indigenous groups across the state. “There are about 40 communities [in the cooperative], and they are

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<sup>42</sup> It is important not to over-romanticize these cooperative arrangements. Communities had serious divisions over whether or not to join and over what would be produced (Interview 1). Many cooperative members live in conditions of abject poverty and have low levels of education. Variations in land quality give some producers heightened capacities to produce over other members, and international pressures constantly create the danger for increased centralization and technocratization of production (Raynolds 2004, 1115-1116). A cooperative is not “a harmonious space of collective growth but one where political, gender, and class differences have manifested themselves” (Hernández 2001, 186).

distributed across different regions ... of Chiapas” (Interview 17). “We are in 22 municipalities of the State” (Interview 43). The cooperatives have also networked various indigenous groups. “We work with different dialects ... we have representatives directly in each region according to the dialect” (Interview 43).

As a result, individuals from various municipalities became increasingly willing to interact with each other, whereas previously they had not. While it was once the case that small communities would not permit their daughters to marry outside of the community, one pastoral worker directly attributes the influence of these lay-run organizations to fostering more inter-communal marriages (Interview 1). “There is solidarity between communities now. It used to be that in some of the smaller areas, they would not allow their daughters to see or marry someone outside. Now that has changed. There is a lot of cooperation between groups in various ways. For me, it was the organizations that have changed and formed the relations between communities” (Interview 1). Specifically assessing the impact of producer cooperatives, Shannon Mattiace concludes that “these organizations were not explicitly cultural, but they organized Indians across community boundaries, allowing Indians of different ethnicities to see themselves as members of a larger community” (Mattiace 2003, 19).

A government observer specifically linked increased civic engagement in indigenous communities to the economic production created by the organizations. “I think the Church has helped create consciousness in the indigenous communities through the trust it has created” (Interview 42). For international actors interested in helping in Chiapas following the 1994 uprising, the only way to access indigenous communities was

to go through the Church (Interview 57). “At some point it was the entry to Chiapas. If you wanted access ... the only way to get trust of the indigenous communities was to go through the Church” (Interview 57).

The result was that “people were participating for the first time as citizens. In some cases as many as 40 percent of villagers occupied some office or other, while community assemblies became the center of decision-making” (Harvey 1998, 64-65). Furthermore, communities began to apply their newfound organizing power to political matters. One independent organization formed to provide cheap transportation, thereby breaking the community’s reliance on expensive transportation provided by a local political boss. “They saw that it would be good to ... buy their own bus through the efforts of the community ... and in this way it advanced and cooperation between the people grew” (Mattiace 2003, 44).

### *Pro-Social Cooperators*

As predicted by the model, the efforts of religiously committed pastoral workers also played a critical role in prompting larger cooperation. Immediately following decentralization, indigenous communities in Chiapas were still inhibited from cooperating due to previous histories of interaction that had been characterized by centralized governance. They required a catalyst to prompt cooperation.<sup>43</sup> According to pastoral workers assigned to Altamirano and Las Margaritas in the 1960s, it took several years of painstaking effort in indigenous communities to produce results. Indigenous

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<sup>43</sup> This is the case in the agent-based model presented in chapter 3 as well. It takes time following decentralization for individuals to anticipate reciprocal exchange from others even though the ideal institutional framework is in place.

communities were initially skeptical of the Church's new pastoral efforts, the majority of individuals could not read or write, and no one wanted to volunteer for anything. "When we began to visit the communities, they didn't accept us easily ... this was a normal reaction ... At first when everything started, the word we always heard was 'I don't know,' or 'I can't.' This situation was in all of the groups. Nobody wanted to volunteer" (Interview 45).

These problems were overcome by the sustained patience and tenacity of pastoral workers who also taught the basic administrative, Spanish, arithmetic, and technical skills to the indigenous laity to run their own cooperative organizations. These skills would later be essential to help organize civic participation (Kovic 2005, 79-80; Interview 45, Interview 1; Interview 42).

As related earlier, deacons and catechists held leadership positions in the cooperatives. "We have discovered that they have the best projection across the community. This means that they are not people who are going to do something on the side with the money ... It's trust, that's not all of it, but mostly this is why they are in charge" (Interview 46). Because these pro-social individuals cooperated in situations where self-interested individuals would be more likely to defect, they were in a position to engender reciprocal interaction within their communities. While cooperation was slow to form, progress was made as pastoral workers and lay catechists and deacons took initial steps to provide religious club goods. As the agent-based model suggests, they supplied kindling to prompt cooperation. Meanwhile, decentralized monitoring and sanctioning helped these organizations sustain the production of material rewards that

enticed the self-interested majority to join and reciprocate, leading to large-scale and sustained cooperation.

### *Limited Church Intervention*

Once on their feet, the Diocese allowed the laity to govern the cooperatives in an autonomous manner with little clergy interference. One priest explained that “now these [cooperatives] are run by members of the communities themselves ... [we] have nothing to do with them” (Interview 45). Another priest mentioned, “we have always tried to make these social, economic, and even religious organizations outside of the shadow of the Church. Everything, collectives included, exists today because they have not been under the shadow of the Church” (Interview 45).<sup>44</sup>

Nearly every cooperative I spoke with suggested the Church played a pivotal role in their formation,<sup>45</sup> but now allowed them to manage their own affairs. “At the beginning, the Church was very involved. The Church had groups involved in evangelization. These groups had the idea of reorganizing land, managing schools, lights, and everything ... Now the Church is not so involved” (Interview 17). “The Catholic Church had a lot to do with the formation of the organization” (Interview 2). “Now we don’t have much relation with the Church, but before there was a lot. The Church helped to found the cooperative” (Interview 30). As expected, clergy gave the laity a great deal

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<sup>44</sup> I pushed him on this point, asking him if he had encountered situations where he disagreed with the manner in which the laity were running their organizations. “Now, if we didn’t agree with something they were doing, that’s a tricky situation. You don’t say anything publicly. You go to them as you would a friend and say, look, I might do it this way or that way, but that’s the extent of it” (Interview 45).

<sup>45</sup> Only one cooperative I spoke with (Interview 83) had been formed independently of the Church. It was formed in the 1990s, much later than the first wave of cooperatives in the region that formed during the 1960s and 1970s.

of autonomy in managing these cooperatives that were designed specifically to give greater material welfare to their constituents.

*Decentralization and the Development of Political Organizations in Chiapas*

This section details the link between the decentralized indigenous productive organizations that were developed by the Church throughout the 1960s and 1970s and the political organizations that grew throughout Chiapas beginning in the late 1970s. It is important to recall that my theoretical model does not aspire to predict the form of political activism emerging from decentralization, be it armed, unarmed, progressive, conservative, ethnic, or otherwise. Indeed, local control and autonomy means that political activism will likely develop in a variety of forms, some unforeseen and perhaps undesired by the Church hierarchy.

Following this discussion, I assess the possibility that political activism in Chiapas was externally generated from Marxist elements or through the ideological manipulation of the Catholic Church. I argue that leftist elements came to Chiapas precisely because the region had already generated a vibrant civic movement. Leftists joined a process that was already underway. While some suggest political activism was the result of ideological manipulation by Bishop Ruiz, such explanations cannot explain why some organizations deviated from his vision of non-violent resistance. Additionally, the argument cannot explain why several organizations presumably motivated by liberation theology would have allowed themselves to be co-opted by the Mexican government throughout the 1980s and 1990s.



The Church's decentralization created a well-networked system of cooperatives throughout the region. The organizational framework provided by these networks subsequently formed the core of many of the political groups that developed in the 1970s, 80s, and 90s. As several observers describe, it was the encouragement of "decision-making and internal accountability" that led to the development of politicized groups in Chiapas (Washbrook 2007, 13). "Within these emerging communal groups and networks, people developed new bonds of trust, solidarity, and cooperation and learned basic organizational skills ... [T]his social capital served as the organizational infrastructure for the emergence of peasant indigenous protest movements across Indian Mexico." (Trejo 2004, 144). Powerful political organizations such as *Lucha Campesina* and *Tierra y Libertad* found their organizational origins in these cooperatives. Organizational life in remote communities like Guadalupe Tepeyac and San Marcos (later Zapatista strongholds) centered around coffee cooperatives. "Everything revolved around coffee" (Interview 45).

The indigenous demonstrated their burgeoning abilities to organize politically during the Indigenous Congress of 1974. By 1972, the PRI political party was anxious to develop good-will with Mexican citizens following the 1968 repression of the student movement (Collier and Quaratiello 1999, 61; Harvey 1998, 77). The governor of Chiapas asked Bishop Ruiz to help him organize the Indigenous Congress in commemoration of the five hundredth anniversary of the birth of Fray Bartolomé de las Casas (Harvey 1998, 77; Collier and Quaratiello 1999, 61; Womack 1999, 31). Ruiz agreed on the condition that the Congress would be organized and run by the indigenous themselves (Womack

1999, 31). By this point, lay pastoral agents of the Diocese were ideally positioned to do so. “Throughout the 1960s and 1970s, catechists and deacons had slowly become the most powerful and respected local community leaders in Chiapas’s indigenous regions – especially those that also functioned as leaders of ejido unions [trans-communal cooperatives] and the emerging popular movements” (Trejo 2004, 236).

The Indigenous Congress was accordingly organized at the grassroots level. Rather than having been formally organized by the Church or the government from the top-down, the indigenous themselves, utilizing regional networks that had developed as a result of religious decentralization, organized their own Congress. It was the first assembly of its kind that allowed the 1,250 indigenous delegates from 327 communities to voice their own concerns, questions, indignation, criticism, and solutions (Collier and Quaratiello 1999, 62-63; Womack 1999, 31-32; Harvey 1998, 78).

The Congress marked a watershed in indigenous organization and further inspired heightened political organization. The entire Diocese had become characterized by highly decentralized local units, closely and actively engaged in the production of material club goods and well-networked by the ties that linked the various productive cooperatives across communities. The stage was set for the emergence of politicized groups throughout the region.

For example, between 1973 and 1978 deacons and catechists across the Diocese organized a contingent of communities and successfully halted logging operations in the Lacandón jungle (Harvey 1998, 79-80). One of my interview respondents spoke of this period with noticeable excitement. “This is when the grand movement began ... because

it was now not only in one place but at the level of the state ... You can't imagine how everything emerged, very great and exciting things. Two large organizations emerged here in the community... *Lucha Campesina* (Peasant Struggle) and *Tierra y Libertad* (Land and Liberty)" (Interview 45).

While a multitude of independent political and economic organizations emerged throughout the countryside, the most important in the Lacandón region were *Quiptic Ta Lecubtesel*, (from Ocosingo), *Tierra y Libertad* (from Las Margaritas) and *Lucha Campesina* (from Las Margaritas) (Harvey 1998, 79). The Emiliano Zapata Peasant Organization (OCEZ) became an important political organization in the region of Venustiano Carranza while the Independent Central of Agricultural Workers and Peasants (CIOAC) became influential in Simojovel (Collier and Quaratiello 1999, 71-72). Decentralized Catholic communities constituted the primary social and organizational base of these movements (Trejo 2004, 147, 227-228). The local productive groups that had grown from diocesan decentralization provided the organizational base for the political movements that came afterward. This prior organizational framework was essential to the development of political activism in Chiapas (Yashar 2005, 73-75).

#### *Socialists and Liberation Theologians*

Following the outbreak of the 1994 Zapatista revolt, a variety of Mexican scholars, in an attempt to deny the legitimacy of the Zapatista rebellion as an autonomous movement, argued that leftists and the progressive Catholic Church manipulated indigenous communities into rebellion (Harvey 1998, 8-9). These arguments noted that Bishop Ruiz had invited leftist political elements to assist in the work of preparing

delegates for the Indigenous Congress (Womack 1999, 173-174). Furthermore, the organization La Quiptic arose with the aid of leftist organizers (Harvey 1998, 79-80).

Consistent with the manner in which he had reorganized his Diocese, Bishop Samuel Ruiz had indeed recruited individuals who could help organize at a base, grassroots level (Harvey 1998, 81; Womack 1999, 174). He met with representatives of the leftist Proletarian Line (also known as Popular Politics) in 1976. The organization appealed to Ruiz because it did not call for armed action, and it had a history of successful grassroots organizing (Womack 1999, 33-34, 174-175; Harvey 1998, 82; Collier and Quaratiello 1999, 75).<sup>46</sup> Several local priests were supportive and allowed leftist organizers access to catechist-organized meetings (Collier and Quaratiello 1999, 75; Womack 1999, 34).

At this point, however, the organizers of the Proleterian Line tried to wrestle control of the cooperatives away from the deacons and catechists who ran them. These efforts were successfully fended off (Womack 1999, 34; Harvey 1998, 82-83). The communities had final sway over whether or not they would accept the organizing efforts of the leftist outsiders. As one prominent community member recalled: “In general, we thought it would be dishonest to turn the communities over to people who, though apparently very well intentioned, were outsiders ... we would not close the doors, but neither would we turn the communities over to them” (Collier and Quaratiello 1999, 75). In essence, the leftist organizers served at the behest of the indigenous communities.

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<sup>46</sup> The move was controversial. The Jesuits in Bachajón participated initially but soon withdrew, deciding to discourage outside politics within their sphere of influence (Womack 1999, 34).

Similarly, Guillermo Trejo concludes that, rather than guerilla leftists influencing the character of Chiapas, it was “the unparalleled wealth of communal organizational networks, mostly built by Bishop Samuel Ruiz and his diocese .... [that] were the real magnet that attracted urban guerilla groups into the highlands, north and east of Chiapas” (Trejo 2004, 207). Instead of outside influences prompting Chiapan civil society, it was the prior existence of said civil society that drew in leftist elements.

One may also be tempted to conclude that the agenda of political activism came about as a result of the will of Bishop Samuel Ruiz who was, after all, an adherent of liberation theology and who had actively promoted political organization. Yet ideological commitment to liberation theology cannot explain the sheer multitude of political stances and organizations that emerged in Chiapas, nor why many of them allowed themselves to be co-opted by the Mexican state. Like Kalyvas, I find that once mobilized, the Catholic laity had a tendency to move political activism to arenas that were unanticipated and undesired by Catholic clergy (Kalyvas 1996).

Political activism developed far beyond the initial input of the Church. Local cooperative organizations continued to grow, consolidate, and become regional political powers. In 1980, Quiptic merged with *Lucha Campesina*, *Tierra y Libertad*, and other cooperative organizations to form the Union of Ejido Unions and Associated Peasant Groups of Chiapas. This large conglomeration represented at least 150 separate communities and 10,000 families. It became the first and strongest independent peasant power in the region (Womack 1999, 34; Harvey 1998, 84; Mattiace 2003, 41; Collier and Quaratiello 1999, 76). In 1981, it organized a march on Tuxtla Gutiérrez by 3,000

peasants to protest evictions (Collier and Quaratiello 1999, 76), and the Union successfully negotiated with the government for transportation and credit concessions for its member communities (Mattiace 2003, 41; Harvey 1998, 83; Womack 1999, 34).

Given the local and decentralized character of the Diocese, it is unsurprising that these organizations soon split. By 1983, the Union of Unions experienced difficulty holding together its various local factions. While it had won concessions from the government, more radical elements accused it of collusion and left the organization. Some groups looked for better economic and credit opportunities (Womack 1999, 36; Eisenstadt 2011, 87). As will be discussed in a subsequent section, the Mexican government successfully co-opted many of these independent organizations, particularly under President Salinas' Solidarity social program (Womack 1999, 11; Rus and Collier 2003, 48). This further enraged and radicalized various elements of civil society (Collier and Quaratiello 1999, 78; Eisenstadt 2011; 87). Many began to feel that peaceful protest was useless (Manaut et al 2006, 136-137), and a large current of thought moved well beyond the Diocese's vision of peaceful resistance.

Throughout the 1980s, prominent Catholic laity allied with social workers in the Forces of National Liberation (FLN), a radical and violent leftist political group. Soon the influential deacon of deacons and high-ranking lay members of other predominantly Catholic organizations became members of the FLN. They encouraged members of their communities in the Lancandón jungle to arm themselves (Womack 1999, 35-37), and they did so while continuing to carry out social programs in the name of the Diocese. The FLN would later go on to spawn the armed Zapatista Army of National Liberation

(EZLN). Despite his progressive stance, Bishop Ruiz had no desire for communism. He favored incremental reform to social revolution (Harvey 1998, 71).

In a sign that the direction of activism was clearly spiraling beyond the Church's expectations and wishes, the Diocese formally broke with the FLN in 1988, six years before the Zapatista uprising (Womack 1999, 199-201). Local priests severed ties with communities they had worked with for decades, often painfully. One priest I spoke with emotionally recalled his decision to leave the community he had ministered to for years after being approached to support the Zapatistas:

“They posed it to me, Comandante Tacho [a member of the EZLN's command structure] and *Marquitos*, and I said look you know that I cannot ... I imagine that the same happened to several of us. You are born with the movement, even though you don't realize it, you are part of it. I was there from the beginning, I was an advisor I think ... A moment arrives when you realize that you cannot continue, above all when ... certain decisions mean life or death ... Many [in the Church] said I cannot anymore, because it's going to do more harm than good” (Interview 45).<sup>47</sup>

By the end of the 1980s, there were a variety of independent organizations, violent and non-violent, representing the interests of indigenous *Chiapanecos*. Some of these organizations were perceived as having been co-opted by the state, others managed to continue to work independently, and others prepared for war. Particularly with regard

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<sup>47</sup> The priest told me that leadership within the EZLN wanted him to travel to Guadalupe Tepeyac to view the preparations they had in place about a month before the uprising (unbeknownst to him at the time). He refused and asked to be transferred to a new location (Interview 45).

to the armed insurgent movement, political activism had moved to a realm well outside of what the Church had originally envisioned for Chiapas.

As an additional response to whether Ruiz's ideological commitment drove activism in Chiapas, one of my interview respondents insisted that the Church did not push its agenda off on communities. "Don Samuel didn't act as a patron but rather as a facilitator of the creativity and decisions of the people" (Interview 28). The Church saw its role as one of accompaniment rather than leadership (Harvey 1998, 75). The Diocese did not determine the demands of the indigenous communities, but it did work to facilitate their agenda (Interview 28).

Despite its unintended political consequences, diocesan decentralization continues today in the Diocese of San Cristóbal de las Casas. Bishop Samuel Ruiz retired in the year 2000, but his successor, Bishop Felipe Arizmendi, has maintained the broad form of Ruiz's pastoral plan (Interview 81; Interview 56).<sup>48</sup> The Vatican, concerned about political radicalism in Chiapas and recognizing the power of decentralization to create unintended political consequences, has restricted the appointment of new permanent deacons (Interview 56; Interview 31; Interview 46). The Diocese, however, is still served by more than 300 deacons, and it continues to promote deacon candidates who perform what are essentially the same functions as permanent deacons (Interview 31; Interview 46). The Zapatista rebellion of 1994, of course, changed the contours of civil society in the region. NGO's took substantial interest and poured a great deal of resources into the region, started their own organizations, and became part of the network of Chiapan civil

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<sup>48</sup> This is despite a previous perception by many that he was ideologically conservative while serving as the Bishop of Tapachula.



society. Though international interest has since waned, the network of civil society and civic activism remains strong, nestled upon the foundation provided by religious decentralization in the Diocese of San Cristóbal de las Casas.

### *Alternative Explanations*

This chapter now turns to consider alternative explanations for variation in levels of political activism between Chiapas and Yucatán. Certainly one important alternative is Yucatán's relatively heightened economic development when compared to Chiapas. However, the next two chapters reveal that while the economic situation in Chiapas was dire, the citizens of Yucatán also faced jarring economic changes with the erosion of corporatist economic arrangements in the 1980s and 1990s. The countryside of Yucatán is marked by devastating poverty.

Additionally, both Yucatán and Chiapas were folded into the Mexican corporatist state. Though the argument could be made that corporatist structures allowed more opportunities for the development of indigenous autonomy in Chiapas than Yucatán, such arguments overstate the ability of the corporatist PRI state to nurture indigenous autonomy in Chiapas. Also, political competition was fierce in both Chiapas and Yucatán and subsequently cannot explain variation in political activism between the two states.

As the analysis will make clear, contemporary theories linking ethnic homogenization to the provision of public goods cannot explain diverging levels of political activism in Chiapas and Yucatán. Additionally, while Chiapas has been marked by a more progressive ideological stance than Yucatán, adherence to liberation theology does not explain the trajectory of political activism in Chiapas. As also further elaborated

in the next chapter, the Archdiocese of Yucatán has moved forward from its conservative ideological rigidity since the arrival of Bishop Emilio Berlie Belaunzaran in 1995. This ideological change has not, however, been accompanied by institutional decentralization, resulting in stunted political activism in Yucatán.

Also, some theories suggest Protestant competition affects propensities for political participation. Such an argument proposes that the Catholic Church was moved to become more politically active on behalf of its religious constituency in an environment of religious competition. While Protestants have been pronounced in both states, Protestant competition does not seem to have prompted political activism in Yucatán. Finally, the historically contentious relationship between the Church and the Mexican state may have a differential impact on participation across Mexico. In areas that were less affected by the violence of Mexico's *Cristero* War in the 1920s and 1930s, the theory suggests the Church should have had more space to become politically active. However, both Chiapas and Yucatán were on the periphery of Mexican politics during the *Cristero* War. Neither experienced notable violence in the conflict, yet the Archdiocese of Yucatán did not take advantage of that space to prompt political activism.

#### *Economic Factors*

Certainly economic conditions have fostered economic hardship in Chiapas. It ranks toward the bottom of Mexican states in terms of education, household income, infant mortality, and the provision of social services. As of the 1990s, half of the population was malnourished, and nearly seventy-percent of the population lived on less than the minimum wage. In the primarily indigenous portions of the state, nearly two

thirds had no indoor plumbing, electrical services, or potable water (Collier and Quaratiello 1999, 16; Womack 1999, 11; Manaut et al 2006, 135).

One respondent mentioned that prior to the 1990s, there were few social services available. “[Before 1986] it was difficult to travel ... and yes, there are still communities ... that don’t have good roads - where there is no light or electricity. There is no potable water” (Interview 4). Another interviewee stated many regions still lack potable water and concrete floors (Interview 3). Indigenous communities generally live in conditions of high marginalization (Interview 42).

Chiapas also suffered a demographic crisis beginning in the 1950s. Population booms in the Chiapan highlands placed increasing economic pressure on a region with few productive opportunities for its expanding labor pool. The federal government encouraged migration into the sparsely populated Lacandón jungle in the remote eastern reaches of the state where the federal and state governments had virtually no presence and few public services (Womack 1999, 15 - 16; Harvey 1998, 61; Collier and Quaratiello 1999, 37, 41). While the population of the Los Altos region grew 24 percent from 1960 to 1970, the population of Lacandón municipalities of Ocosingo, Las Margaritas, and Altamirano grew at a rate of 150 percent due to migration (Womack 1999, 16). “Between the 1930s and 1970s the Lacandón forest became the safety valve for land pressures elsewhere in the state” (Harvey 1998, 62).

At first land was plentiful. However, as time wore on and the waves of immigration continued, new arrivals to the Lacandón found it increasingly difficult to establish their own land in the face of territory set aside by the federal government, land

claimed by ranchers, and land held by earlier migrants (Collier and Quaratiello 1999, 37). The situation was exacerbated in the 1980s by refugees from the Guatemalan civil war who underbid Mexican laborers on coffee plantations at rates that even impoverished Chiapans could not compete with (Womack 1999, 21). By the end of the 1970s, Chiapans were no longer heading for the Lacandón but looking elsewhere for economic opportunities, including Cancún and the Mexican Gulf Coast (Rus et al 2003, 7). The 1982 debt crisis and the end of agrarian land reform in 1992 presented additional hardships, and the price of coffee plummeted at the end of the 1980s. Small farmers lost up to 70 percent of their income (Womack 1992, 21).

Economic conditions have certainly fostered hardship in Chiapas. It is one of the poorest and least-developed states in all of Mexico. Though the availability of land to the east of the state forestalled social unrest, this land became more limited as time went on. Economic relationships were thrown into further disarray with the Mexican debt crisis and revision of land reform during the 1980s and 1990s. However, relative deprivation on its own is rarely sufficient to prompt collective action (Olson 1965; Fearon and Laitin 2003; Collier and Hoeffler 2004). As the following chapter will demonstrate, the state of Yucatán also experienced profound economic difficulties over the same period of time. Unlike Chiapas, however, such economic hardship was not sufficient to spur political activism.

### *Corporatism*

Deborah Yashar makes the argument that corporatist “citizenship regimes” unintentionally created autonomous spaces for indigenous communities, allowing them to

maintain their cultures and identities. Within these systems, the state established agencies to channel the demands of various social groups through specific institutional pathways. What individuals lost in terms of the right to independently organize was compensated through social provisions such as land grants, social services, and state subsidies (Yashar 2005).

Yashar argues that land reform gave indigenous communities a new means to provide for themselves and their families while also giving them geographic space to form autonomous communities outside government control. As these corporatist systems began to break down in the 1980s, indigenous communities lost the autonomous spaces provided to them through land reform, and government elites made greater efforts to control local politics. Where indigenous communities could also take advantage of existing transcommunal networks and political associational space, peasants were able to successfully organize along ethnic lines in an effort to reclaim their lost autonomy (Yashar 2005, 55-65).

What makes Chiapas difficult for Yashar's argument is that corporatist systems did not become well-established throughout much of the state. Land-reform was agonizingly inefficient. The zones of Chiapas marked by effective PRI rule were not marked by autonomous zones for the expression of indigenous identity. Instead, local *caciques* (political bosses) suppressed all political dissent under the pretext of maintaining indigenous unity. While the region of the Lacandón jungle did experience autonomy, this was due to a lack of bureaucratic state presence of any kind rather than spaces unwittingly afforded by corporatist governance.

The reach of the land reforms from the Mexican revolution has been uneven across Chiapas. When Mexican revolutionaries came to Chiapas in 1914 to free peasants of their labor and debt servitude, landed elites successfully staved off many land reform initiatives and even took powerful positions within the PRI party itself (Collier and Quaratiello 1999, 28-29). Many peasants were not informed of their new land rights until as late as the 1930s. By 1960, more than half the land was owned by only slightly more than 2% of the population (Eisenstadt 2011, 33). The federal government did little to enforce its land reform policies in Chiapas (Collier and Quaratiello 1999, 30). Furthermore, PRI state presence did not reach remote areas of Chiapas until as recently as the 1970s and 1980. The land the government did manage to grant was often marked by conflicting and overlapping claims. Chiapas had one of the largest backlogs of un-granted land claims in all of Mexico (Eisenstadt 2011, 33).

The PRI was most capable of asserting itself and creating a corporatist “citizenship regime” in the central highlands of Chiapas. By the 1950s and 1960s, these communities had been thoroughly penetrated by PRI state machinery. Landed elites managed to turn the state offices of the National Indigenist Institute (INI) into a vehicle to perpetuate ladino control of indigenous communities (Womack 1992, 12-13). In the process, they greatly empowered state-trained local indigenous intermediaries, turning them into loyal PRI caciques. These local bosses forcefully repressed any political opposition in the name of maintaining cultural unity (Womack 1999, 13). Here, “to the extent that there was native protest of economic and political conditions in earlier periods, it was mediated – and muted – by corporatism of the traditional communities

themselves, and by the corporate nature of their relationship to the state” (Rus et al 2003, 12). Where the PRI corporatist state functioned effectively, it repressed autonomous indigenous development.

Though repression muted political development in the highlands, it did not completely stifle it. “Even in areas where state presence was more intense, such as the highlands region, Indians’ search for alternatives to state-sponsored and state-sanctioned organization accelerated throughout the 1970s and 1980s” (Mattiace 2003, 19).

Thousands were forcibly expelled from the region for challenging the upheld political order, especially from the municipality of San Juan Chamula (Kovic 2005). In the 1990s, the northern highlands became what one historian called reminiscent of a “civil war” as recalcitrant elements fought against the ruthless tactics of PRI authorities for political reform (Womack 1999, 53).<sup>49</sup>

On the other hand, the PRI presence in the eastern Lacandón jungle came much later. As we have seen, the Lacandón jungle of Chiapas became the recipient of a large flow of migration. As thousands poured into the eastern reaches of the state beginning in the 1960s, individuals found little corporatist PRI control (Eisenstadt 2011, 84; Womack 1999, 17-18; Rus et al 2003, 12). At the same time, they received little of the support that Yashar contends corporatist states provide (through land reform, state subsidies, or social services) to nurture the development of indigenous autonomy (Rus et al 2003, 12). Still,

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<sup>49</sup> The institutional Catholic Church has tread lightly in Chamula. Priests were not permitted to establish a formal institutional presence for several decades prior to the turn of the century. Chamula’s *caciques* accused the Church of destabilizing communal traditions. Despite this, the Catholic Church maintained a quiet but influential presence. Dissidents “participated clandestinely in independent organizations” (Rus and Collier 2003, 33) and thousands of progressive Catholics and Protestants were expelled from the community (Kovic 2005).

the PRI's absence did not last forever. The national political parties eventually came with the wave of migrations into the Lacandón. By the 1980s, the PRI developed a forceful presence in the eastern portion of Chiapas (Womack 1999, 15, 19-20).

Not all regions were marked by state control of the central highlands or the relative absence of the state in the Lacandón jungle. In the northern region of Simojovel, the state had a weaker presence than in Chamula but was not as absent as in the Lacandón. The CNC functioned but was not effective in providing land reform. This created considerable pressure for new land redistribution from the 1940s onward. It was not until the 1970s, coinciding with the decentralization of the Diocese of San Cristóbal de las Casas, that the region was marked by large and coordinated efforts by independent organizations to push for land reform (Harvey 1998, 57-58). Indigenous communities in these areas “developed alternative forms of social and political organization not only in confrontation with state officials but also in their absence” (Mattiace 2003, 19). The different local contexts of PRI authority led to differing political identities throughout the state and differences in the “forms of internal organization, and strategic choices” (Harvey 1998, 67). The level of the PRI's institutional presence affected the form and the trajectory of activism, but not the development of activism itself.

Though Deborah Yashar argues that corporatist governance created autonomous spaces for indigenous communities, the reality is that effective corporatist governance was highly sporadic across Chiapas. Many communities did not benefit from land reform. Municipalities that had been effectively penetrated by the PRI were in reality marked by a great deal of political repression. Regions with less PRI presence experienced autonomy



not through gaps allowed by corporatist governance, but instead through a complete absence of federal authority. Variation in the presence of PRI governance across the region affected the trajectory of political activism, but not whether it developed.

*Political Party Competition, Political Repression, and Political Cooptation*

In both Chiapas and Yucatán, the opening of political party competition created negative incentives for political participation. In Chiapas, the PRI resorted to repression and cooptation to check the influence of the new civic organizations that challenged PRI political hegemony. In spite of these measures, independent civil society has flourished. Unlike Yucatán (as described in further detail in the next chapter), these measures did not prevent activism in Chiapas.

Throughout the 1990s, the PRI lost a substantial share of municipalities in Chiapas. Though it held 111 localities in 1994, it had lost 46 either to the PRD or the PAN by 2001 (Inclán 2008, 1326). The PRI withheld social spending from opposition-controlled districts or individuals suspected of supporting opposition parties. Such clientelistic practices in this “punishment regime” were common throughout the Mexican countryside (Magaloni 2006). Individuals who protested these measures were subjected to severe repression, including expulsion from their communities (Collier and Quaratiello 1999, 125, 130; Rus and Collier 2003, 50). At the same time, the PRI political party rewarded its loyal base. As disputes over land became increasingly common in the Lacandón, the government initiated a program in the 1980s and 1990s to buy land and distribute it as ejidos. PRI-dominated communities received preferential treatment. In Ocosingo, for example, 17 PRI communities received this benefit, compared to only one

non-PRI community (Womack 1999, 20-21). More overtly, PRI supporters in the northern sections of the state formed paramilitaries to violently re-institute PRI rule on defecting communities (Womack 1999, 53, 56).

Most effectively, however, the PRI co-opted dissenting organizations under its corporatist umbrella throughout the 1990s. As previously discussed, various independent organizations including the Union of Unions and the CIOAC began to collaborate with the PRI political party, raising accusations that they had been co-opted. The Union of Unions lessened its social demands from the state after it received preferential access to transportation agreements and legal recognition for its credit union. The CIOAC similarly relented for private benefits (Collier and Quaratiello 1999, 78). In 1994, the Union of Unions and its ancillary organizations accepted six million pesos of credits from the Mexican government in a move many observers attributed as a clear attempt by the PRI to buy votes for the presidential election (Collier and Quaratiello 1999, 79).

Furthermore, President Carlos Salinas came to office in 1988 determined to fold independent organizations into the PRI (Rus and Collier 2003, 48; Harvey 1998, 1). In that spirit, Salinas launched the National Solidarity Program (PRONASOL) and brought \$500 million U.S. dollars to Chiapas for social projects and employment opportunities in the early 1990s (Womack 1999, 11; Rus and Collier 2003, 48). To undercut independent organizing, Solidarity only provided funds to local organizations with official ties to the government (Rus and Collier 2003, 49). Organizations were obliged to follow a variety of regulations provided by the state, resulting in the dissolution of many independent productive organizations. Solidarity became a clientelistic mechanism for reinstating

PRI control, particularly in municipalities that were marked by high levels of defection from the PRI party (Rus and Collier 2003, 49; Magaloni et al. 2007, 193-202).<sup>50</sup>

In addition to co-optation, many organizations have experienced outright repression. The 1980s were particularly treacherous as five independent organizers were assassinated in 1982. There were also violent evictions, dozens of kidnappings, and the destruction of a small town (Collier and Quaratiello 1999, 80). Such repression worsened throughout the decade under the governorship of Absalón Castellanos Domínguez (Collier and Quaratiello 1999, 80).

The opening of political competition created a stark political climate in Chiapas throughout the 1980s and 1990s. The PRI party manipulated the distribution of state resources to loyal party members and municipalities, increasing the costs associated with collective action. Because independent organizations arose in Chiapas, they were subjected to repression and cooptation by the government. In particular, cooptation affected the vibrancy of Chiapan civil society and made formal (and peaceful) institutional channels appear less viable for creating substantive reform. Despite this list of serious challenges resulting from political competition, independent organizing was not deterred.

### *Ethnic Characteristics*

One might point to differentiation in ethnic characteristics in Chiapas and Yucatán to explain variation in indigenous political activism between the two states.

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<sup>50</sup> Several of my interview respondents suggested the government had been successful in co-opting many organizations (Interview 29; Interview 32). “The only thing that the government has done is inject money to divide, to disburse. It’s not creating development projects or growth projects. It’s only utilizing economic resources to disburse organizations, in order to weaken us” (Interview 43).

Contemporary theories suggest ethnically homogeneous populations are more efficacious providers of public goods. Yet the ethnically homogenous indigenous population in Yucatán has not provided political activism, a public good, whereas ethnically diverse Chiapas has. As further elaborated in the next chapter, some observers suggest ethnic identity is not as developed in Yucatán as it is in Chiapas. This chapter demonstrates, however, that federal policies in place in both Chiapas and Yucatán discouraged the development of ethnic identities. As a consequence, the initial demands of indigenous groups across Chiapas were not ethnic in character. Instead, demands focused on land reform and advancing a socio-economic agenda based on a common *campesino* identity.

As discussed in Chapter 2, current theories argue that public goods such as political activism are more effectively provided by ethnically homogeneous populations. This is because co-ethnic groups efficaciously find and punish non-cooperators within their social networks (Habyarimana et al. 2007). Such theories would not expect that the seven major ethnic groups in Chiapas, each sharing distinct linguistic and cultural traits (Harvey 1998, 70), should be able to effectively collaborate to produce political activism. However, the social movements that emerged throughout Chiapas were constituted by a variety of indigenous communities. The networks facilitated by Catholic decentralization served to foster collective action.

Additionally, the argument is made that ethnic identity was not as developed in Yucatán as it was in Chiapas. This proposition is further elaborated in the next chapter, but here I suggest that such an argument overstates the extent to which the origins of social movements in Chiapas were predicated on ethnic identity. In reality, the PRI's

organization of indigenous communities across Mexico had the effect of stifling indigenous identity. The PRI organized separate peasant (CNC) and indigenous (INI) organizations. These bodies were not encouraged to interact or collaborate even though the vast majority of indigenous individuals were also peasants (Collier and Quaratiello 1999, 69). While members of the CNC were granted special subsidies, access to equipment, and better access to land reform, the INI focused on assimilating the indigenous into *mestizo* society, offered few rewards for individuals to adopt an indigenous identity, and subsequently “fomented class identity at the expense of ethnic identity” (Eisenstadt 2011, 8). The federal government discouraged collective action between indigenous communities by channeling federal resources through local government, increasing the parochial and isolated nature of individual communities (Collier and Quaratiello 1999, 35-36).

Subsequently, as independent organizing emerged in Chiapas, the result was not an ethnic movement but a movement centered around demands for land and socioeconomic advancement. As indigenous groups began to mobilize in the 1970s, they advocated for land, health, and education rather than for their rights as an ethnic indigenous minority (Collier and Quaratiello 1999, 63). “Community cohesion in the lowlands was given not by strict adherence to native traditions, but by a shared organizational militancy” (Harvey 1998, 64-65). Eisenstadt argues persuasively, for example, that the indigenous of Chiapas are more united by their interests in land reform and their socio-economic status than by their ethnic heritage (Eisenstadt 2011, 82). The Zapatista rebellion “began primarily as a peasant rebellion, not an exclusively Indian

rebellion” (Collier and Quaratiello 1999, 7), and the Zapatistas at the onset of the rebellion made no ethnic demands (Eisenstadt 2011, 5).

In short, ethnic characteristics do not appear to explain variation in indigenous activism in Chiapas and Yucatán. The ethnic heterogeneity of Chiapas should have stifled political activism relative to Yucatán. Disparate dialects and cultural heritages presumably decrease the ability to monitor and sanction across ethnic groups (Habyarimana et al 2007). This has not been the case in Chiapas, however, where religious decentralization was able to overcome such barriers to collective action. Furthermore, Mexican federal policy in place in both Chiapas and Yucatán worked to isolate individual communities and offered few incentives for the development of distinctively indigenous identities. As a result, initial political demands in Chiapas did not center around ethnicity but on socioeconomic concerns.

### *Ideology*

The Catholic Church in Chiapas was undeniably informed by progressive Catholic theology. Bishop Samuel Ruiz was shaped by the Second Vatican Council and the 1968 Bishops’ Conference in Medellin. Liberation theology suggested that the Catholic Church must advocate on behalf of its parishioners and encourage the political activism of its laity. As has been demonstrated, theologically-inspired pastoral agents certainly played an important role in prompting cooperation in their communities. It is critical to note, however, that there is an important organizational, non-theological component built into liberation theology. Though liberationist clergy wanted to alleviate

poverty as a general ideological principle, some liberation theologians also advocated radical organizational innovations involving decentralization (Smith 1998, 9-10).

Accordingly, there is a need to separate the theological and the organizational principles of liberation theology. The theological principles suggested the Church should pursue social justice and emphasize a “preferential option for the poor,” but the organizational principles included the decentralization of Church authority to the laity. Often, liberationist clergy pursued the ideological component but ignored its organizational principles.

Indeed, throughout Latin America and Mexico, progressive clerical elements in the Catholic Church frequently failed to turn their liberation-inspired ideals into reality. “There are countless cases” where the initiatives of progressive Catholic clergy failed (Levine 1988, 252). Frequently, this failure was because the institutional Church neglected to grant decentralized control to the laity. “It is common to encounter the anomaly of ‘progressive’ priests and pastoral agents who promote a liberationist agenda in authoritarian ways. But rhetoric is not enough. Promoting these ideas without providing for their expression in new kinds of self-controlled organizations and actions dooms the group to stagnation and disappearance” (Levine 1988, 257).

As noted in Chapter 2, progressive bishops in Northern Mexico attempted to institute liberation theology in the Archdiocese of Chihuahua but failed. Vikram Chand argues that this was because “the issue of social justice was artificially imposed on society by the Church and a relatively narrow group of social activists” (Chand 2001, 191). Indeed, it was only after the hierarchy abandoned its more radical liberationist goals

and allowed parishioners to set their own agenda that political activism coalesced around the issue of electoral reform (Chand 2001, 191). Liberation theology promoted an ideological agenda supporting social justice. This ideological agenda absent decentralization, however, proved insufficient to prompt political activism.

Chiapas was marked by both the ideological commitment to enhancing the well-being of the poor and the organizational component of decentralizing control to the laity level. Yet as noted throughout this chapter, the Diocese did not push an ideological agenda on indigenous communities but allowed them to develop their own. Furthermore, ideological commitments to liberation theology do not explain the ease with which many of these organizations were co-opted by the government. If individuals had been inspired into action by the ideals of liberation theology, it seems unlikely they would have succumbed to material incentives to be coopted by what liberation theology would have identified as repressive state structures. As has also been noted, Ruiz eschewed violence and wanted to avoid social revolution. Accordingly, the ideological perspective has difficulty explaining the emergence of armed resistance in the state, particularly as this armed resistance grew directly out of the organizational framework created by the Church (Trejo 2004, 207).

### *Protestant Competition*

Theories linking Protestant competition to political activism seemingly explain Chiapas well. The argument made is that the Catholic Church was moved to become more politically active on behalf of its religious constituency in an environment of religious competition (Trejo 2009; Gill 1998; Collier and Quaratiello 1999, 55-56).



However, such an argument fails to explain the absence of political activism in other regions that experienced protestant competition. Furthermore, the timing of decentralization, which Trejo implicitly identifies as enabling political activism by laity, preceded the rapid expansion of Protestantism in Chiapas.

Protestant competition has been robust in Chiapas. In 1970, Protestants made up 5.8% of the Chiapan population. By 1990, they made up 16.3%, and by 2000, Protestants made up 21.9% of the population (Dow 2005, 830). One Catholic official I spoke with estimates that now 27% of the population is Protestant (Interview 81). As Guillermo Trejo argues, the Catholic Church was unable to offer the kinds of ecclesial awards that Protestants were capable of offering their members. While indigenous Protestants could become clergy, the best the Catholic Church was able to offer aspiring indigenous religious elites was positions as deacons. Deacons are given a great deal of ministerial responsibilities, but these responsibilities are ultimately as the laity and not as members of the clergy.

According to Trejo, the Church could not compete with Protestants on this ecclesial front, so it decided to publicly promote the social causes and concerns of indigenous communities. It also created economic cooperatives to allow parishioners to provide for their own material welfare (Trejo 2009, 337-338). Trejo's argument suggests that Protestant competition compelled political activism, and he implicitly suggests that it contributed to the Diocese's efforts to decentralize authority to the laity. Essentially, the Diocese created catechists and deacons to compete with Protestants on the ecclesial front,

and it created economic cooperatives to compete with Protestant efforts to provide literacy and basic health services.

However, the timing of decentralization in Chiapas preceded the rapid expansion of Protestantism across the state. As previously established, Ruiz decentralized the Diocese of San Cristóbal de las Casas during the 1960s and 1970s. However, in 1970, while Ruiz was in the midst of his efforts to decentralize the Diocese, Protestants made up a relatively small 5.8% of the population. By the time Protestant competition exploded in Chiapas in the late 1970s and 1980s, decentralization was already well underway.

Furthermore, this theory does not seem to explain other regions in Mexico. The level of Protestant competition in Chiapas while it was decentralizing in 1970 trailed Campeche (at 6.6% of the population), Quintana Roo (at 9.5% of the population),<sup>51</sup> and Tabasco (10.1% of the population) (Dow 2005, 830). Yet the Catholic authorities in these regions did not engage in anything near the level of religious decentralization that the Church in Chiapas had,<sup>52</sup> despite their relatively high levels of Protestant competition. As the following chapter demonstrates, Protestant competition prompted neither religious decentralization nor political activism across the Archdiocese of Yucatán.

### *Church/State Relations*

As the reader will recall from the discussion of chapter 2, some accounts suggest where there has not been a history of church/state conflict, religious institutions have

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<sup>51</sup> It should be noted that Quintana Roo belonged to the Archdiocese of Yucatán before it was developed into the Prelature of Cancún-Chetumal in 1970.

<sup>52</sup> In 1990 the Prelature of Cancún-Chetumal had no permanent deacons, Campeche had 1, and Tabasco had 2. These figures are compared to more than 300 deacons in Chiapas.

more space to foster political activism among the laity. Within Chiapas, there is little oppression by the government against the Catholic Church, and the region was not impacted by the fighting of the Cristero War (Meyer 1978, 108-109). We would expect, then, that the Catholic Church in Chiapas would have space to act politically. As expected, the Catholic Church took advantage of this space to speak out on political matters and, as demonstrated throughout this chapter, encourage political activism by its laity.

While relationships between the Church and the government are respectful and collaborative (Interview 19), the Church often criticizes the government publicly. One clergy member I spoke with mentioned that “there has always been respect .... But yes, there is excess from people in government, and it’s denounced” (Interview 46). Similarly, another church official also mentioned that “in general there is respect. There are [times] where we relate to the government the necessities that the people have and urge a solution. This is not for political reasons but for the good of the people” (Interview 81). Indeed, clergy in the Diocese of San Cristóbal de las Casas often critique government policies (Interview 19).<sup>53</sup> As has been demonstrated throughout this chapter, the Diocese also played a decisive role in prompting political activism by the laity.

In Chiapas, the Church is often critical of governmental policies and has prompted political activism by its laity. While one might make the argument that the Chiapas’ position at the periphery of Mexican politics gave it space to encourage political

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<sup>53</sup> Though most of the clergy I spoke with suggested the relationship between the Church and state was respectful, one priest remarked that the relationship between the Church and State was “bad because there has always been confrontation ... the Church declares the truth” (Interview 31).

activism, Yucatán has had similar space but has not done the same, as will be discussed in the next chapter. The legacy of church/state relations in Mexico accordingly has little explanatory power in explaining variation in political activism between Chiapas and Yucatán.

### *Conclusion*

Associational and protest activity have been pronounced throughout Chiapas. The Chiapan countryside is characterized by a vibrant network of civic and political associations. Protests in the form of land invasions, formal marches, and even violent rebellion have taken place across Chiapas over the last several decades. I argue that this heightened level of political activism has been the result of religious decentralization.

In Chiapas, the Catholic Church decentralized monitoring, sanctioning, and decision-making authority to the laity. Decentralized decision-making occurred as the laity were permitted to democratically select their own lay catechists and deacons, and these lay leaders were also given autonomy to develop their own themes for discussion. Furthermore, the Church made an effort to integrate indigenous customs and languages into the liturgy of the Church, making it much more accessible to indigenous populations. These factors played an important function in providing communities with a public forum to express their social and economic concerns within the religious institution and to begin to develop solutions.

The decentralization of monitoring and sanctioning of material religious club goods occurred through economic cooperatives created by the institutional Church. These cooperatives enabled local Catholic communities to monitor contributions to excludable

religious material club goods such as health, education, and technical services exclusively available to contributing group members. Group members received compensation proportional to their productive output. As the cooperatives produced increasing levels of material goods, they encouraged reciprocal interaction across the region and provided the organizational framework that led to powerful political demands across Chiapas. Furthermore, ideologically-driven pastoral workers played a pivotal role in forming and directing economic cooperatives. They provided kindling for developing sustained cooperation in conjunction with decentralized monitoring and sanctioning. The resultant organizational framework was driven by indigenous communities themselves rather than leftist political elements or the liberationist Catholic Church, and it directly contributed to the development of political activism in Chiapas.

This chapter has also assessed a variety of alternative explanations for the development of political activism in Chiapas. The potential for economic grievance was strong in Chiapas. However, as will be discussed in the next chapter, poverty is rampant throughout rural Yucatán. Economic hardship accordingly does little to explain variation in indigenous activism between the two.

As the next chapter will further elaborate, it is possible that corporatism provided less autonomy for communities in Yucatan than it did in Chiapas. However, corporatism in Chiapas did not provide enclaves of autonomy for indigenous communities. Where it functioned effectively, indigenous communities were in fact met with a great deal of repression. Furthermore, land reform was only sporadically granted, and there was a great deal of variation in the PRI's ability to penetrate communities across Chiapas. Variation

in such effective corporatist governance affected the trajectory of political activism, but not whether or not it developed.

Additionally, political competition has been robust in Chiapas. Political parties have been known to punish opposition supporters by withholding federal funds, thereby creating negative incentives for political participation. In Chiapas, political competition has also led to violence and efforts by the federal government to co-opt independent organizations. While political competition may have deterred participation in Yucatán, it has not done so in Chiapas. Moreover, and as also explained in greater detail in the following chapter, ethnic homogeneity fails to explain variation in activism between Chiapas and Yucatán. Chiapas has more ethnic diversity than Yucatán but has experienced much more activism. Furthermore, indigenous communities in Chiapas initially organized around socioeconomic demands rather than indigenous rights.

While liberation theology explicitly encourages political change, the application of liberation theology without institutional decentralization has failed to prompt political activism across Latin America. Adherence to liberation theology as espoused by Bishop Ruiz fails to explain the co-optation of many organizations that emerged from the Catholic Church. Ideologically committed individuals committed to resisting institutionalized violence would have presumably resisted efforts to be co-opted by the state. Additionally, Ruiz opposed violence, yet the Zapatista's armed insurgent organizational structure developed directly as an unintended by-product of diocesan decentralization.

Protestant competition initially appears to explain political activism in Chiapas. However, Trejo implicitly suggests competition led to decentralization, and decentralization was what enabled laity to organize politically. In reality, decentralization predated the rapid expansion of Protestantism across the Diocese, and other areas in southern Mexico that experienced higher levels of Protestantism than Chiapas in 1970 did not decentralize. Furthermore, the next chapter suggests Protestant competition has difficulty explaining political activism in Yucatán. Finally, and as elaborated in the next chapter, while Chiapas' relative distance from contentious Mexican church/state conflict appears to have granted it space to speak out politically, Yucatán has also benefitted from similar space but has not done the same.

This account of Chiapas highlights and explains the importance of the decentralization of religious structures for facilitating political activism. The argument would expect that a contrasting lack of religious decentralization should also be met by the absence of political activism. This dissertation now examines the relationship between religion and the absence of political activism in Yucatán.

## Chapter 6

### THE CENTRALIZED CATHOLIC CHURCH IN YUCATAN

The previous chapter examined Chiapas, a case marked by high levels of indigenous political activism. One might reasonably expect Yucatán, the state examined in this chapter, to have experienced activism in a similar manner. The proportional size of Yucatán's indigenous population is one of the largest in Mexico. Its indigenous inhabitants maintain a distinctive cultural tradition and speak a common dialect. Much like Chiapas, Yucatán experienced wrenching economic change throughout the 1980s and 1990s that could have stimulated grievances, and, compared to other regions in Mexico, the PRI political party offered a relatively open environment for political dissent. Similarly to Chiapas, Yucatán also experienced Protestant evangelization and conversion. Despite these characteristics, Yucatán is marked by little political activism of any kind. Why did indigenous mobilization fail to materialize in Yucatán, and why is Yucatán marked by low levels of political activism generally?

The theory advanced in this dissertation contends that religious decentralization has a positive impact on political activism, and the previous chapter demonstrated that religious decentralization led to the development of political activism in Chiapas. For my theory to be correct in explaining the lack of political activism in Yucatán, I should find that the Archdiocese of Yucatán has not decentralized authority to the lay level. Church laity should have few opportunities for making substantive decisions within the Church. The Catholic Archdiocese of Yucatán, furthermore, should provide laity with few opportunities to monitor and sanction the production of material religious club goods.



There should be few civic or political organizations whose origins are linked to the Catholic Church.

As elaborated in this chapter, the Archdiocese of Yucatán has not decentralized monitoring, sanctioning, or decision-making authority to laity. While it has created catechists and deacons to aid in religious instruction and ministry, these lay pastoral workers do not have the freedom to set their own themes for discussion as they have in Chiapas. Furthermore, deacons are not located in rural areas. Though the Archdiocese has created pastoral councils for the laity to express their voice in parish affairs, decision-making authority in nearly all pastoral matters resides within the religious hierarchy. The religion has not provided a forum for community discussion and problem-solving as it has in Chiapas.

Furthermore, the Archdiocese has not facilitated the monitoring and sanctioning of material club goods in Yucatán in a similar manner as the Diocese of San Cristóbal de las Casas in Chiapas. While a few cooperatives have been started by a very small contingent of committed laity and priests (acting without the support of the Archdiocese), they have been actively discouraged and even harassed by the institutional hierarchy. As a result, these cooperatives are isolated and provide few economic resources to their members. They have not served to create reciprocal exchange or an organizational base to prompt collective action.

There is little empirical data on the Catholic Church in Yucatán. This absence is pronounced when assessed against the plethora of work on the Church's activities in Chiapas. My study addresses that disparity. I conducted thirty-five interviews in Yucatán

from 2011 to 2012 with members of the Church hierarchy, civic activists, charitable volunteers, church-goers, government officials, and regular citizens. These interviews allowed me to examine the governance model of the Archdiocese of Yucatán and the implications of this structure for the development of political activism across the peninsula.

This chapter first provides a brief description of Yucatán and my principal field research sites of Tizimín and Valladolid. It then examines the relative absence of political activism throughout the state and attributes this absence to the lack of religious decentralization by the Archdiocese of Yucatán. Finally, a variety of alternative explanations might potentially explain the absence of indigenous activism in Yucatán. Accordingly, this chapter assesses the impacts of economic development, the opening of Mexico's political space, the influence of Protestant competition, Yucatán's ethnic characteristics, the influence of religious theology, and the history of church and state relations in Yucatán on political activism.

### *The State of Yucatán*

Yucatán is mostly flat, although parts of the south are characterized by hilly terrain. Despite its plain landscape, Yucatán's geographic isolation from the rest of Mexico has given it a unique cultural and political history (Martin and González 2008, 170). Throughout the 19<sup>th</sup> century, Yucatán was only accessible by sea (Rugely 2009, 10). It declared independence from Mexico in 1841 but was permanently reincorporated in 1848 during the tumult of the Caste War, an uprising by elements of indigenous Mayan society against the Yucatecán *mestizo* government (Gabbert 2004, 91; Rugely 2009, 40,

59). As a result, Yucatán, like Chiapas, has often been at the periphery of national Mexican politics.

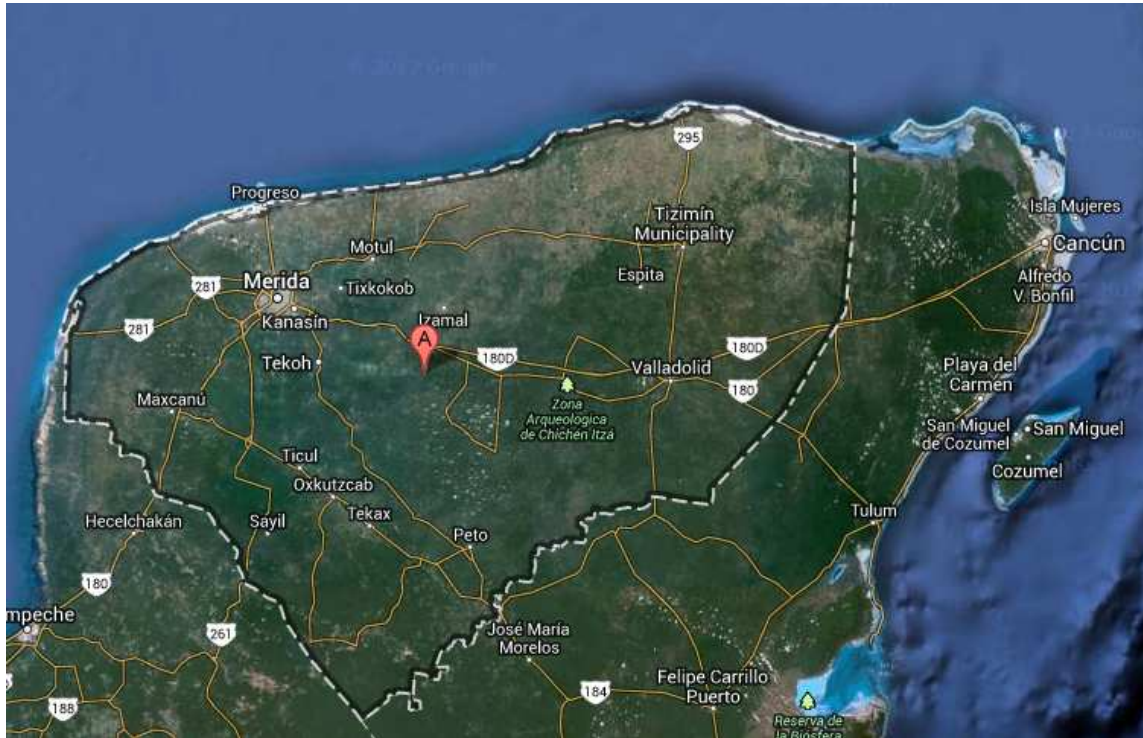


Figure 7. Map of Yucatán. “Yucatán, Mexico.” Map. *Google Maps*. Imagery © 2013 TerraMetrics, Map data © 2013 Google, INEGI. Accessed 11 June 2013. Web.<sup>54</sup>

A large proportion of the Mayan people live in small rural communities referred to locally as *comisariás*. The production of henequen, a natural fiber used in the production of cable and rope, became economically important at the end of the 19<sup>th</sup> century. The eastern portion of the state, on the other hand, focused agricultural production on traditional Maya milpa, a Mesoamerican agricultural technique focusing on the production of corn, beans, and other crops (Diggles 2008, 4, 31). The city of Mérida serves as the state’s urban, commercial, and cultural center and contains

<sup>54</sup> See Appendix F for Google Maps rules and guidelines for use of copyrighted content.

Yucatán's only international airport. It employs nearly half of the citizens of the state and contributes three quarters of the state's economic output (Baklanoff 2008, 13).

Tizimín: Located in the northeast corner of Yucatán, Tizimín is among the largest geographical municipalities in the state and has a population of around 64,000 (INI-CONAPO 2000). Protestant competition here is larger than Yucatán generally.

Approximately 74% of the population adheres to Catholicism while the rest is split up primarily amongst a variety of Protestant sects (INI-CONAPO 2000). Approximately 52% of the population speaks an indigenous dialect (Yucatec Maya) (INI-CONAPO 2000). 39% of the population lives in poverty (Trejo 2010).<sup>55</sup>

The city of Tizimín is a commercial center of the region and has two parishes. Santos Reyes serves approximately two-thirds of the city's population, and Nuestra Señora de Guadalupe serves the remainder. One priest estimates that about half of the population of his parish is made up by the small *comisaría*s surrounding Tizimín, most of which are at least forty kilometers outside of the city. The *comisaría*s experience little growth and are made up primarily of *campesinos*. The north of Tizimín is marked by ranches and cowhands, and few in the northern regions attend school (Interview 51). The Parish of Guadalupe is mostly poor and largely populated by Mayan individuals (Interview 63).

Valladolid: Valladolid is located in the southeastern portion of Yucatán with a population of approximately 57,000 individuals, about 63% of whom speak an indigenous dialect (INI-CONAPO 2000). 33% of the population lives in poverty (Trejo

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<sup>55</sup> Defined as the average of the proportion of the population that is illiterate and the proportion of households earning less than one minimum wage (Trejo 2009, 331).

2010). Approximately 86% of the population practices Roman Catholicism. Valladolid, like Tizimín, is made up of 2 parishes, San Servacio and San Bernardino. The parish of San Servacio also serves 19 *comisaría*s near the city. Like Tizimín, the people are generally very religious (Interview 11).

### *Civic and Indigenous Activism in Yucatán*

Despite its ethnic characteristics, Yucatán has experienced surprisingly little indigenous activism. Of Mexico's indigenous states, Yucatán was the last to formally incorporate indigenous rights into its state constitution (Mattiace 2009, 140). Though 2,382 indigenous protest events occurred in Chiapas from 1976 to 2000, only 60 occurred in Yucatán over the same period of time (Trejo 2010).<sup>56</sup> Associational activity centered on indigenous activity is highly limited, as “there are no large-scale associations in Yucatán centered on an ethnic identity of ‘Maya’” (Cocom 2005, 146). In short, “ethnic identity as not been politicized in Yucatán, and ethnic mobilization and organization have been sporadic and short-lived” (Mattiace 2009, 148).

One government official in the Yucatecan delegation of the National Commission for the Development of Indigenous Peoples (CDI) explained that the indigenous in Yucatán have not organized themselves in the same way that they have in Oaxaca or in Chiapas. In point of fact, the CDI was more engaged with efforts to write indigenous rights into the state constitution than indigenous communities themselves.

“There wasn't a lot of participation. We had to try ... almost oblige them to participate. There weren't people who supported us, to say ‘we want our rights [written]

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<sup>56</sup> See Chapter 2, footnote 6 for a discussion of the protest measure.

into law.’ On the contrary, *we* fought so that *they* could have them, but we didn’t receive any response [from the indigenous communities]. This is why it took so long, from 2007 to 2011, for statutory law to be made” (Interview 8).

Beyond indigenous organization, there is little civic activism generally. On one hand, a few independent organizations and groups formally embedded within Mexico’s corporatist peasant leagues have organized movements for wage reform (Diggles 2008, 154-155; Mattiace 2009, 145). Still “independent peasant organization in Yucatán has been historically weaker than in Chiapas and in other regions of Mexico ... Peasant organization independent of the CNC [National Peasant Confederation] in Yucatán tended to be sporadic and to disappear fairly quickly” (Mattiace 2009, 146). Generally, peasants in Yucatán are not characterized by “independent or militant political behavior” (Baños 1988, 334).

My interviewees also expressed general agreement that there are few civic organizations in Yucatán (Interview 8; Interview 26; Interview 37; Interview 41; Interview 48; Interview 50). “It’s very little – there are very few civic associations here” (Interview 37). Those individuals I interviewed who did participate civically generally held positions within political parties, were paid salaries for holding governmental positions (Interview 9; Interview 20; Interview 25), or came from families with a history of involvement in politics (Interview 67; Interview 49).

On the other hand, Yucatán enjoys relatively high levels of electoral turnout. As previously mentioned, Yucatán’s participation rate in the 2006 Presidential election was nearly 67%, well above the national average of 58.55%. Despite its rural character, the

electoral district that encompasses both Tizimín and Valladolid experienced even higher voting rates of 69.24% (IFE 2010). The general consensus among my interview respondents was that a majority of Yucatecan citizens engaged the political process through voting (Interview 8; Interview 13; Interview 20; Interview 27; Interview 38). As will be discussed later in this chapter, however, turnout may at least be partially explained by the resources expended by the PAN and the PRI political parties to turn out voters for their respective sides.

### *The Centralized Archdiocese of Yucatán*

With regard to its laity, the Archdiocese of Yucatán adheres to a centralized governance model. Laity are given few opportunities to participate in monitoring, sanctioning, or decision-making activities within the Church. Though the Archdiocese has made an effort to increase religious participation following the arrival of Yucatán's current Archbishop, Emilio Carlos Berlie Belaunzarán, parishioners are in reality given few opportunities to make local decisions. Unlike Chiapas, cooperatives providing decentralized monitoring and sanctioning have not been created by the Archdiocese. Those economic cooperatives that do exist are isolated and have been created outside the purview of the institutional Church. They have not served to foster reciprocal interaction or to provide an organizational base for the development of political movements across the region.

### *Decision-Making*

Within the Archdiocese of Yucatán, decision-making is held primarily by the clergy. The hierarchy itself is somewhat decentralized as local priests have autonomy to

make a broad range of pastoral decisions. However, little of this decision-making capacity filters down to the laity of the Church. Pastoral councils have been created to give the laity a greater voice in Church affairs, but few decisions are made by laity within these bodies, and few local solutions are formulated. Catechists give religious instruction as directed by the hierarchy. The deacons of the diocese are concentrated entirely within the metropolitan center of Mérida. Finally, the Church has not made a concerted effort to integrate indigenous customs and beliefs into the liturgy of the Church, making it less accessible to many indigenous communities than it is in Chiapas. Taken together, these factors have meant that the religious institution has not served as a forum allowing laity to discuss and develop their own solutions to local problems.

Though the Archbishop maintains final decision-making authority in all matters (Interview 11), the priests I interviewed explained that the Archdiocese gives them a great deal of latitude to implement pastoral goals and to manage the day-to-day operations of their parishes (Interview 23; Interview 11; Interview 63; Interview 51). While priests have to follow the general guidelines of the pastoral plan (a broad framework for achieving the Archdiocese's ministerial goals), a local priest has the freedom to adapt it to his own particular environment. The Archdiocese recognizes that the pastoral needs of a metropolitan center such as Mérida are very different from small *comisarías* of only several hundred people (Interview 11). "The Bishop isn't a feudal lord who says 'this is my land, do what I want.' He listens to priests ... his team of people who help him make decisions" (Interview 11).



Though the Archdiocese gives its priests freedom to formulate their own solutions for local problems, it is important to note that in neither Chiapas nor Yucatán are laity allowed to choose their local parish priest. Priests serve at the pleasure of the bishop, and the bishop has sole decision-making authority over where priests are assigned. Local decision-making authority by priests is not analogous to local decision-making authority by laity.

Lay parishioners, on the other hand, have few opportunities to make decisions in the Archdiocese. At first glance, the Archdiocese appears to have made a sincere ideological commitment to increase avenues of participation for its laity since the arrival of current Archbishop Emilio Carlos Berlie Belaunzarán's in 1995. Yucatán's Catholic hierarchy has emphasized greater participation of the people in their own parishes. A key development in this regard has been the creation of pastoral councils. Each parish has its own council of laity who advise the parish priest (Interview 69). In the same way that the Archbishop has a council of advisors, the parish priest has a council that, in theory, helps him make decisions about where and when mass should be and that also helps him carry out the pastoral plan (Interview 11).

While this all appears participatory, laity are not given substantive decision-making authority across the Archdiocese. One priest explained to me that in reality the pastoral plan is drawn up by a select number of individuals in the hierarchy. Local priests are given freedom to choose the best way to implement it, but "everything comes from the top" (Interview 22). Laity have the right under canon law to assemble and advise clergy, but they do so under the direct supervision of a parish priest (Interview 63;

Interview 22). At no point, one priest stressed, do laity convene together to identify or formulate solutions to particular problems (Interview 22). While individuals appear eager to follow instructions given to them from a priest, they do not make decisions themselves. “The parishioners do what the priest tells them to do, ... but they lack leadership. Laity lack initiative in this sense. What the priest says, they do with good charity but always just what the priest says” (Interview 23).

One lay person explained to me that, “there are people here that, yes, they give when the priest asks them to, not because they want to, but for obligation ... because our religion requests it” (Interview 48). One priest also made it clear that he ultimately makes the decisions in the parish. “What [the council] tells me is fine, but I decide what’s going to happen. The decision is mine” (Interview 51). Thus, while parishioners are given the right to organize and advise in pastoral councils, they have few capacities to make substantive decisions.

Furthermore, in Chiapas lay catechists were given authority to select themes for discussion for local lessons. This created a forum wherein individuals could discuss social and economic problems and formulate solutions for them. This has not been the case in Yucatán. Instead, lay catechists receive instruction from the priest which they then communicate and implement throughout the pastoral sector (Interview 26). The priest guides the themes for discussion (Interview 11). A lay catechist I spoke with confirmed this top-down model. The Archdiocese decides the theme to be discussed each month and the types of activities that are going to be done. The parish priest then decides how this is to be taught locally (Interview 39).

Unlike Chiapas, where deacons share decentralized ecclesial authority and direct economic cooperatives throughout the countryside, Yucatán's deacons are entirely concentrated in metropolitan Mérida (Interview 11). One priest mentioned that he hoped that his Eucharist ministers might one day become permanent deacons. In the thirty years that he has been a priest, however, he's been able to work with only one permanent deacon (Interview 11). There has been some talk of establishing a deaconate school in the south of the state, but this has not materialized. The Archdiocese has not promoted the development of deacons across the diocese, despite the fact that priests away from Mérida have noted a need for them (Interview 23).

Finally, as discussed in the previous chapter, the Catholic Church in Chiapas made a concerted effort to incorporate Mayan beliefs, customs, and languages into the liturgy of the Church. In the Archdiocese of Yucatán, however, this has not been the case. While some priests express a need to adopt indigenous liturgical elements of into the Church, others express hostility to such an idea:

“There is a whole current of thought in academics, in government - a whole current of *indigenista* ... They are considered to be of a purity that is superior to decayed western society ... Our great Maya – the marvelous Maya - made human sacrifices, so it's nonsensical to believe that they are pure because they are ancient ... There were marvelous things in indigenous cultures but also horrible things, just like in our society. So the first thing is not to fall in *indigenismo* ... What I want for them is to be Christians, believe in Christ, and be saved.” (Interview 51).

Other priests are more open to such practices. In discussing the incorporation of indigenous practices into the Catholic mass, one priest mentioned that incorporating Mayan elements into the liturgy “is not syncretism but an expression of symbolic faith with Mayan elements” (Interview 11). At the same time, the Archdiocese of Yucatán has not made the kind of concerted effort that the Diocese of San Cristóbal de las Casas has to incorporate Mayan elements into the liturgy. “There are priests that don’t speak Maya, there are priests that have not engaged with Mayan traditions. We have not given the indigenous what Catholic liturgy and doctrine gives to us. ... Here in Yucatán it’s more traditional” (Interview 23). Another priest, while acknowledging that he would like to learn the Mayan language, admitted that he has not done so (Interview 63). The Archdiocese has not made a resolute push to incorporate Mayan culture into its pastoral plan. This has resulted in fewer avenues for participation than in the Chiapan Church by indigenous communities.

#### *Monitoring and Sanctioning*

In Chiapas, decentralized monitoring and sanctioning were granted through economic cooperatives created by the institutional Church. Lay and clerical pastoral workers provided technical assistance and a common decentralized model of local governance. Unlike the Diocese of San Cristóbal de las Casas in Chiapas, cooperatives in the Archdiocese of Yucatán have not been promoted by the hierarchy. In point of fact, the hierarchy actively discouraged them and provided no similar initiative throughout the Yucatán peninsula. The religious institution in Yucatán subsequently provided few

material club goods for its members and did not facilitated the emergence of an organizational network.

Those cooperatives that do exist have been formed outside the auspices of the institutional Church. I spoke to one individual who has led an effort to form economic cooperatives throughout Yucatán since the 1970s. Though devoutly Catholic, he suggested the two largest obstacles to his work have been the government and the institutional Church, both of which have put up impediments to forming economic cooperatives in Yucatán. Accordingly, the work of forming and sustaining cooperatives has been difficult. The people do not have the proper training to run them, and many cooperatives do not have the resources to function properly (Interview 71). Similarly, a small core of progressive priests operating an agricultural school (*Escuela de Agricultura Ecológica*) in the southeastern town of Maní encouraged the development of an economic cooperative. However, these efforts were similarly frustrated by Yucatán's church hierarchy. The Archdiocese has successfully intimidated some of these priests into abandoning their efforts. The relatively few cooperatives in Yucatán are small and isolated. They have not been able to produce significant economic benefits for their members (Mattiace 2009, 151-152).

The result is that there is little solidarity across communities in Yucatán or within the larger municipalities (Interview 8). As the reader will recall, the theoretical discussion of Chapter 2 suggests that individuals become more willing to interact and engage in reciprocal exchange following religious decentralization because they have a general expectation that others will cooperate rather than defect. Reciprocal exchange

grew following religious decentralization in Chiapas through the increasing numbers of individuals who interacted to produce material club goods and through the cooperation of individuals across communities.

In Yucatán, however, these reciprocal networks do not exist. It was common for me to encounter skepticism on the part of interview respondents regarding whether they could count on other members of their communities to cooperate rather than pursue their own individual interests. Many respondents focused on the egoism of the people in accounting for the lack of civic participation in the peninsula (Interview 25; Interview 37; Interview 38; Interview 48; Interview 49; Interview 10; Interview 70). As one respondent suggested, “throughout the whole state, we tend to be quarrelsome. We don’t know how to work in a team ... we are a selfish people who do not allow others to grow” (Interview 25). Such a view expresses little confidence that others can generally be expected to cooperate.

The Archdiocese of Yucatán has not encouraged the development of decentralized monitoring and sanctioning through cooperatives or through any other analogous institutional mechanism. Cooperatives have not, subsequently, served to entice participation in the production of material club goods. They also have not contributed to reciprocal exchange across the Archdiocese or the development of an organizational network. The prior existence of organizational networks sharing common goals has been conjectured to be a necessary condition for the emergence of political activism by indigenous communities (Yashar 2005). The absence of such an organizational

framework, due to the lack of decentralization in the Archdiocese of Yucatán, largely explains the absence of political activism by indigenous communities in Yucatán.

The decision-making process in the Archdiocese of Yucatán operates in a hierarchical manner. Though the Archdiocese has promoted initiatives to increase the participation of its laity, pastoral decisions are in reality made by a select few in the Archdiocese. While lay pastoral councils may advise, decision-making authority remains firmly within the hands of the parish priest. The parish councils aid in the implementation of the centrally-directed pastoral plan. Though the Archdiocese has deacons, they are not dispersed throughout the peninsula but are instead concentrated in Mérida. As a result, the religious institution has not become a forum for individuals to discuss their local problems and formulate solutions to them. Finally, church-sponsored economic cooperatives, the key institutional mechanisms allowing for the monitoring and sanctioning of material club goods by laity in Chiapas, were strongly discouraged in Yucatán. Those that have been created lack institutional support from the Church, have few resources, and are isolated. As a result, there has been no effective provision of material club goods or a concurrent growth of reciprocal interaction. There has not been the development of an organizational network that has facilitated the development of political activism as occurred in Chiapas.

#### *Alternative Explanations*

##### *Economic Factors*

Of all the rival explanations potentially accounting for the lack of civic activism in Yucatán, the most compelling concerns Yucatán's economic development, particularly

in comparison to the economy of Chiapas. The successful diversification of the Yucatecan economy during the 1990s, along with the rapid development of Cancún in neighboring Quintana Roo, potentially softened economic hardship across Yucatán. In essence, economic development led to muted demands for reform and subsequently lessened the demand for political activism. Such an argument, however, overstates the economic development of the Yucatán peninsula. Extraordinary poverty engulfs the rural poor, particularly given the economic dislocation the Yucatecan economy has experienced with neoliberal reform.

Yucatán's diversified economy is highly ranked among Mexican states in terms of income, employment, and fixed-capital formation (Martin 2008, 171; Baklanoff 2008, 7-8; Turner 2002, 117). Tourism has become a boon to the economy. Yucatán has been able to capitalize on the explosive development of Cancún by drawing visitors into the interior of the peninsula to see Mayan archaeological ruins (Baklanoff 2008, 7-10). Furthermore, Yucatán has been the beneficiary of an "escape valve" of migration from Yucatán to Quintana Roo (Mattiace 2009, 150). Cancún provided desperately needed jobs and wages in a commutable distance from Yucatán (Diggles 2008, 48; Cruz 2008, 139; Baklanoff 2008, 10-12).

Yet the benefits of tourism and economic diversification have not been shared by everyone. Jobs produced in both the tourism and *maquiladora* (sweatshop) sectors are generally marked by "low wages, few benefits or stability, and little opportunity for socio-economic mobility" (Martin 2008, 165; 171). While tourism flourishes around well-trodden archeological sites such as Chichen Itza, tourists seldom stop at most



Yucatecan towns or villages. Most communities see little benefit from the tourist trade (Martin and González 2008, 174). One individual I interviewed explained, “if you’re in the city there is no need, but if you go outside you will find the reality ... if you go to the *comisarías* or to the ranches you will not find electricity, water, transportation, or telephones ... the interior is all the same in Yucatán” (Interview 9).

Several statistics suggest the economic situation in Yucatán is dire. 34.6 percent of the population lived in poverty in the year 2000, ranking seventh worst among Mexican states. 48.4% of the rural population of Yucatán lives in poverty, which ranks fourth-worst among Mexican states. Only Chiapas, Oaxaca, and Guerrero suffer worse rural poverty (Székely et al. 2007, 249, 260). While elements of Yucatecan society certainly have benefitted economically from Yucatán’s recent economic expansion, poverty remains a serious problem outside urban centers.

Additionally, many Yucatecan laborers commute to Cancún, leaving behind their families. It is not uncommon for 30 to 40 percent of the men in a town to commute to Cancún for work where they hold low-wage positions (Heusinkveld 2008, 121, 113). As a respondent from one small village explained: “the majority of the people from here go to the Riviera Maya or Cancún ... They only see their family during their day off ... it’s difficult to live like that” (Interview 9). These patterns put a strain on family life. “Sometimes we see [that the wife here says] ‘I cannot take this anymore. Who is going to take care of my children?’” (Interview 63). The benefits supposedly associated with economic diversification and neoliberal reform have been severely disruptive of

traditional village life, offer few possibilities for economic advancement, and have illustrated stark differences in living conditions amongst economic classes.

Furthermore, the dismantling of corporatist economic relationships in Yucatán had profound economic impacts on the region. The production of henequen, a natural fiber used for the production of rope and cable, became an effective instrument for the PRI political party to maintain control in Yucatán throughout the twentieth century. Peasants depended on the party for cultivatable land, and the party developed peasant leagues that effectively channeled political demands (Diggles 2008, 47). Unfortunately, as synthetic fibers became increasingly available throughout the twentieth century, the international competitiveness of henequen dropped considerably.

Because the PRI's political authority depended on its ability to provide wages through the production of henequen, the Mexican government continued to pour money into its production. Governmental policy was designed to keep rural peasants loyal to the PRI rather than to respond to external market conditions (Baklanoff 2008, 6-7), and the Mexican government lost 83 cents on every dollar spent on henequen production (Baños 1988, 310). By the end of the 1970s, Yucatán subsequently became one of the poorest states in Mexico. It was kept adrift by federal investment in a decaying and corrupt production system (Moseley and Delpar 2008, 37), but a system on which peasants were wholly dependent.

Economic crisis forced a retrenchment of Mexico's corporatist political and economic practices during the 1980s. A huge proportion of the Mayan peasant population relied on the state for its livelihood, but the end of corporatism sounded the death-knell of

their economic support (Mattiace 2009, 114, 144). Throughout the period, subsidies to the region diminished significantly, the henequen industry was privatized, and land redistribution was officially ended in 1992 (Mattiace 2009, 145; Diggles 2008, 50; Baklanoff 2008, 7). Over 30,000 ejidatorios received severance pay from the Mexican government, while an additional 12,000 were given early retirement. The traditional economic engine of Yucatán's economy was thoroughly dismantled (Baklanoff 2008, 7). Furthermore, the end of agricultural subsidies resulting from new free trade agreements discouraged farming (Kray 2005, 339). Despite the diversification of the Yucatecan economy and the development of Cancún, such radical destabilization of the economy surely had the potential to create mobilization against state actions.

Finally, a variety of scholars have suggested that the capital investments necessary for the production of henequen meant that peasants had less autonomy to manage their agricultural affairs in Yucatán. Peasants were tied more strongly to state-sponsored peasant associations than in other regions of Mexico (Mattiace 2009, 149; Diggles 2008, 152-153, 156), resulting in largely passive political attitudes across Yucatán (Baños 1988, 326, 310).<sup>57</sup> This perspective cannot explain, however, why similar political apathy characterizes the eastern and southern regions of Yucatán. These regions produced traditional agricultural products such as corn and were not tied to henequen. They enjoyed greater autonomy from the state to produce and market their agricultural products (Mattiace 2009, 149-150). This autonomy would have been disrupted by the introduction of neoliberal economic practices, prompting demands

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<sup>57</sup> Muchlinski (2013) also argues that patterns of market integration affect collective action outcomes.

against the state (Yashar 2005). Yet “this relative autonomy ... has not translated into ethnic based organization” (Mattiace 2009, 150).

In short, the argument could be made that both successful economic diversification and the development of Cancún have assuaged the demand for political activism. Certainly both contributed to the development of increased wage labor throughout the peninsula, and Cancún in particular provided wages for Yucatecan laborers. At the same time, Yucatán has some of the highest rates of rural poverty in Mexico. The retrenchment of government support of agricultural production had devastating impacts on Yucatán’s *campesinos*. There was certainly a basis for economic grievance across Yucatán. Furthermore, some argue that the level of corporatist state intervention necessary to produce henequen reduced the autonomy of indigenous communities and their capacity to organize politically (Mattiace 2009; Baños 1988). Yet such an argument has difficulty explaining the eastern and southern portions of Yucatán. These areas were less dependent on henequen and had more autonomy from the state, but they are also characterized by political apathy.

### *Political Competition*

Certainly any explanation of Mexican political involvement should account for the influence of Mexico’s transition from single-party, PRI-dominated rule to more legitimate multi-party competition. Where the PRI was marked by heightened levels of political competition, we would expect to see heightened levels of political participation and activism. However, I find political competition between the PAN and PRI has had a counterintuitive impact on political activism in the region. While voter turnout rates are

high, the fierce competition between the parties has made citizens hesitant to participate in civic life for fear of economic reprisals.

Electoral competition came to Yucatán early in the 1960s. The PAN was able to win the mayorship of Mérida as well as seats within the state legislature (Moseley and Delpar 2008, 37; Diggles 2008, 153; Turner 2002, 104). While initially isolated, opposition victories by the PAN throughout Yucatán were common by the 1990s (Turner 2002, 104). Compared to the rest of Mexico, the political system was relatively open. The PRI corporatist regime generally opted for co-optation rather than repression of political dissidents, creating potential space for citizens to express their grievances (Mattiace 2009, 139). Corporatist PRI resistance did not represent a major impediment to political participation in the region. Shannon Mattiace concludes that “the relative absence of ethnic mobilization in Yucatán during these years was not the result of coercive state politics [or] a lack of political opportunities” (Mattiace 2009, 147-148).

On the other hand, increased political competition between the PAN and PRI political parties in Yucatán has had complicated effects on political activism and political participation.<sup>58</sup> In order to gain votes, both parties have developed extensive organizational means to reach deep into the countryside. Both are strongly active throughout the state and have a great deal of influence, making it difficult for other community organizers to gain the attention of the people (Mattiace 2009, 150). Party leaders from both the PAN and the PRI detailed to me in our interviews extensive efforts by the parties to engage individuals in the countryside (Interview 52; Interview 25).

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<sup>58</sup> The PRD does not have a strong electoral presence in Yucatán (IFE 2010).

Conflicts between PAN municipal governments and the PRI state government that ruled Yucatán throughout the 1990s were intense and have created acrimony within communities (Cruz 2008, 140). The PRI state government made it difficult for opposition-controlled municipalities to obtain federal funding. Additionally, PRI mayors were often accused of favoring established PRI supporters in the distribution of municipal resources (Turner 2002, 119).<sup>59</sup> My own investigations suggest municipal and state transfers of party control have created problems in the distribution of funds in Yucatán. One former municipal official from the PAN party explained to me his troubles with the PRI state government. “When we were in power, we were PAN. The [PRI state] government didn’t send us all of our resources, and it didn’t send them on time. When the resources aren’t sent on time, a lot of things get held up ... it’s difficult when the governments aren’t the same party” (Interview 9). Such a situation was typical across Mexico across the 1990s (Magaloni 2006).

The resultant back and forth between the parties makes citizens reluctant to participate. They fear they will suffer economic consequences for having publicly supported a particular political party or for having advocated a political position once parties change power. One interview respondent claimed that municipal authorities have been known to withhold social services and Mexican PROCAMPO agricultural subsidies from individuals who are too critical of local government, political activists, and members of opposing parties (Interview 9). Another party official mentioned that it is common for new political groups in power to disproportionately dole resources out to

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<sup>59</sup> This assertion is more strongly demonstrated by the qualitative evidence than the quantitative evidence (Turner 2002).

their supporters (Interview 10). In at least one community in Yucatán, the National System for the Integral Development of the Family (DIF), which distributes federal social assistance at the municipal level, has historically served as an instrument for parceling partisan favors and punishing opposition (Interview 49). In such an environment, it is likely that keeping quiet is the safest economic course for individuals to pursue.

On the other hand, voting is highly encouraged by both parties, and individuals have likely become accustomed to receiving bribes to participate in what has traditionally been a clientelistic political process. As one local journalist described, “the political parties have caused the Mayan communities to become accustomed, since the period of PRI rule ... to receive ... provisions, food, or refreshments ... People come with the expectation that they are going to receive a taco” (Interview 37). The poor economic and social conditions of *campesinos* make them vulnerable to bribery by both the PRI and the PAN political parties. The parties say to them “I’m going build a roof for your house, and you’re going to be with me” (Interview 37).<sup>60</sup>

Certainly political space has existed in Yucatán for the development of political movements. However, citizens must navigate a complicated political situation wherein state governments may withhold federal funds from troublesome municipalities, and municipal officials may withhold federal funds from troublesome individuals. Such considerations have likely played a dampening effect on political activism in the region. However, we have already seen that Chiapas is marked by partisan competition that is at

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<sup>60</sup> Nearly every individual I interviewed said that they voted in elections. They tended to discuss their reasons for doing so in terms of civic responsibility and as an opportunity to express their vote in political affairs. Unsurprisingly, none mentioned having personally received any form of economic or political favors from either the PAN or PRI.

least as acrimonious as it is in Yucatán, if not more so. Despite such divisive partisan feuds, political activism is vibrant in Chiapas, suggesting partisan competition does not have determinative impacts on political activism.

### *Ethnic Characteristics*

As alluded to in the introductory chapter, homogenous ethnic groups are posited to be more efficacious in the production of public goods (Habyarimana et al 2007), whether through “preference” mechanisms where co-ethnics share common preferences or through “technology” and “strategy selection” mechanisms where similar language and cultural characteristics aid in the identification and punishment of defectors.

However, this perspective simply cannot explain variation in levels of political participation between Chiapas and Yucatán. Indigenous populations make up a larger proportion of the overall population in Yucatán than in Chiapas. As described earlier, 37.3% of the inhabitants of Yucatán speak an indigenous dialect, compared to 24.6% of Chiapas’ inhabitants (INI-CONAPO 2000). More importantly, throughout Chiapas 36% of indigenous language speakers speak Tzotzil, 34.4% Tzeltal, 17.3% Chol, 4.6% Tojolabal, and 5.1% Zoque. In marked contrast, Yucatán’s primary indigenous dialect is almost universally spoken. 99.6% of individuals speaking an indigenous dialect (547,098 of 549,532 indigenous speakers) speak ancestral Mayan (INI-CONAPO 2000; Cifuentes and Moctezuma 2006, 212).

If common ethnic and linguistic traits produce common preferences or facilitate monitoring and sanctioning, it should be the case that public goods are more efficaciously provided in Yucatán than Chiapas. In reality, the ethnically homogenous indigenous



population of Yucatán has not produced political participation, but the ethnically diverse population of Chiapas has. As we saw in the previous chapter, decentralization of the Catholic Church encompassed a variety of ethnic identities that coalesced around common socio-economic issues. The institutional context, rather than ethnic characteristics, encouraged political participation.

One might point to the absence of a developed indigenous identity in Yucatán to explain differences in political activism. Indigenous populations in Yucatán generally resist being labeled as Maya and disassociate themselves from the accomplishments of ancient Mayan civilizations (Mattiace 2009, 141; Fallaw 1997, 574). Furthermore, many reject the political message of the Zapatistas in Chiapas (as it has evolved after 1994) and do not want to be associated with that movement's political ideology (Castañeda 2004, 38). The reluctance of the Maya in Yucatán to organize as an ethnic identity dates back at least to the attempts of Lázaro Cárdenas to mobilize the region's indigenous population in the 1930s (Fallaw 1997, 574 -575).

While it is tempting to think indigenous activism has not developed in Yucatán simply because identities have not developed along ethnic lines, it is important to remember that ethnic grievances and claims were not the original instigators of indigenous mobilization across Latin America. Early activists instead demanded land redistribution (Yashar 2005, Trejo 2009, 328), and it was only later that demands became framed along ethnic lines. Furthermore, the Maya of Yucatán undeniably continue traditional customs that are highly differentiated from *mestizo* society, including

maintaining their own distinct language (Mattiace 2009, 142). Such ethnic differentiation is a marked and daily part of life in Yucatán.

Ethnic characteristics poorly explain differentiation in political and indigenous activism between Chiapas and Yucatán. Current theories connecting ethnic homogeneity to the provision of public goods predict that ethnically homogenous populations have an advantage in producing public goods such as political activism. However, while Yucatán's indigenous population is large and unified by common linguistic and cultural traditions, it has not engaged in political activism. The ethnically fractionalized indigenous population of Chiapas has. Furthermore, the argument that the absence of political activism in Yucatán is a result of underdeveloped indigenous identities fails to convince for two reasons. First, it overstates the extent to which indigenous movements in areas such as Chiapas formed as a result of ethnic grievance. As was elaborated in the previous chapter, civic movements in Chiapas emerged first over socioeconomic demands. Indigenous demands came after the Zapatista uprising. Second, however the indigenous identify themselves, there is noted differentiation between *mestizo* and indigenous individuals in Yucatecan society.

### *Ideology in Yucatán*

Under Archbishop Manuel Castro Ruiz from 1969 to 1995, the Archdiocese of Yucatán was one of the most conservative dioceses in all of Mexico. It was “dominated by a conservative hierarchy, uninterested and – indeed – openly hostile to the formation of translocal social movements” (Mattiace 2009, 148, 150). However, the Diocese has pursued a less ideologically conservative course under Bishop Archbishop Emilio Carlos

Berlie Belaunzarán than what had been pursued under his predecessor. However, because this more progressive stance has not also been accompanied by decentralization, political activism has not developed. In a related manner, this section also examines the extent to which differences in general Catholic belief as practiced between Chiapas and Yucatán may also have affected propensities to engage in political activism between the two states.

Over the last fifteen years, there has been a significant expansion of avenues for lay participation through pastoral assemblies. The pastoral plan implements many of the progressive pastoral recommendations made by the Second Vatican Council (Interview 51). Indeed, the Yucatecan Church has even sought to foster heightened democratic participation through workshops on democracy (Interview 11). While these measures are moderate compared to liberation theology, one would still expect that they would help to increase political participation in the region. As discussed previously in this chapter, however, the Archdiocese has not made substantive efforts to decentralize authority to its laity through decision-making, monitoring, and sanctioning in the provision of material club goods. Accordingly, this moderate ideological change has not prompted larger religious or political engagement.

For example, participation within one parish in Yucatán continues to be bogged down by lay apathy (Interview 69). One parish priest who recently emigrated back to Yucatán from the United States complained about his attempts to prompt more participation in the pastoral council. He has grown accustomed to the manner in which Catholic parishes function in the United States, and he eventually wants his pastoral

council to make decisions regarding parish finances and maintenance. Yet he has found that the laity are generally unwilling to participate. “It is difficult to get people to participate on these councils ... Sometimes, they say why am I going to say something, or do something, if things are going to be the same. They don’t believe in the change” (Interview 63). He attributes this reluctance to the years in which laity have lacked a legitimate voice in parish affairs (Interview 63). Encouraging the laity to participate is not the same as giving it decentralized authority. Without a sustained effort by the Archdiocese to the latter, it is difficult to effectively prompt the former.

Finally, one of the advantages of using a comparative analysis with the same religion, as is done in this study, is that it controls for a great number of potentially intervening theological variables. When asked what they consider to be fundamental tenets of the Catholic faith, it was common for respondents to discuss the sacraments and traditional Catholic traditions (Interview 4; Interview 41; Interview 36; Interview 12), to emphasize fellowship within their communities and their interactions with others (Interview 3; Interview 16; Interview 19; Interview 67; Interview 49), or to emphasize the divine nature of God or of Catholic faith (Interview 28; Interview 26; Interview 52; Interview 39; Interview 21). There was little systematic difference between respondents across the two regions, suggesting the basic tenets of Catholic teaching did not impact propensities toward political participation between Chiapas and Yucatán.

While the opening of ideological conservatism in the Archdiocese of Yucatán has certainly not gone as far to embrace liberation theology, the Archdiocese has been influenced by the ideas emanating from the Second Vatican Council. However, this

influence has not been met by the substantive decentralization of decision-making, monitoring, and sanctioning capacities. Additionally, when asked about the most important and fundamental tenets of the Catholic faith, respondents in both Chiapas and Yucatán gave similar answers that emphasized the importance of sacraments, the importance of religious communities, or the importance of God and faith. Fundamental Catholic doctrine is similar in Chiapas and Yucatán.

### *Protestant Competition*

In Chiapas and elsewhere in Latin America, Catholic authorities competed with mainline Protestant denominations who offered material rewards and ecclesial decentralization to their adherents. A prominent line of argument suggests that in order to compete with these new denominations, the Catholic Church was forced to advocate on behalf of its constituents for economic and political rights in a manner that also enabled political activism (Gill 1998 Trejo 2009). Such a line of argumentation does not appear to apply to Yucatán. Protestant competition was strong across the state, yet the Church hierarchy did not encourage social mobilization.

Responding to Yucatán's status as an apparent empirical anomaly to the theory, Guillermo Trejo has argued that Pentecostal denominations in Yucatán emphasized spiritual rewards and gifts rather than the material rewards that mainline Protestant denominations had modestly offered in Chiapas. Accordingly, the Archdiocese of Yucatán sought to compete with Protestants by offering spiritual rewards rather than material ones. It had less incentive to encourage political mobilization due to the particular nature of Protestant competition in Yucatán (Trejo 2009, 340). If this argument

is correct, we would expect that members of the Catholic hierarchy would identify Pentecostal rituals and practices as key reasons why individuals convert to Protestantism, and priests should adopt such practices in order to attract adherents. However, this does not appear to have been the case throughout the Archdiocese of Yucatán.

Though no state in Mexico has experienced the level of religious competition that Chiapas has, Yucatán has experienced considerable Protestant growth, particularly from the 1970s to the 1990s. In 1970, Protestants made up 3.4% of the Yucatecan population. By 1990, they made up 9.3%. During that time, Yucatán was second only to Chiapas among Mexican states in gains made among Protestants as a percentage of the population. By the year 2000, Protestants made up 11.4% of the Yucatecan population. Only Chiapas (21.9%), Campeche (17.9%), Quintana Roo (15.7%), and Tabasco (18.6%) had a higher percentage of Protestants than Yucatán (Dow 2005, 7, 13).

The growth is clearly visible to the Yucatecan people: “Lately the sects have grown a lot ... in the small and poor communities” (Interview 8). “What used to reign was Catholicism ... now we have about 15 different Churches and about 7 or 8 different kinds of religions” (Interview 9). “From about the 1980s until now a mountain of religions have arrived” (Interview 37). A Baptist minister I spoke with mentioned that “in Yucatán it is clear that the evangelical people continue growing [in numbers]” (Interview 24).

None of the priests or church officials I spoke with attributed the conversion of Catholics to Protestantism to Pentecostal worship practices. Instead, the most widespread opinion was that the Catholic Church itself was responsible due to its inability to

effectively minister to the people. “There are a lot of factors, but the most determinate one is the omission of the Catholic Church – the ineffectiveness of the Church. It fell short. So the faith weakens and becomes more fragile ” (Interview 51). “We continue a traditional evangelization that doesn’t arrive to everyone, and so many Catholics live their Catholicism in their own way and without formation” (Interview 11).<sup>61</sup>

Furthermore, no priests or Church officials I spoke with mentioned using Catholic Charismatic Renewal, a movement within the Catholic Church imitating Pentecostal practices, as a strategy for combating Protestantism. On the contrary, one priest told me that “the Protestants have their choir, their music and everything,” but “the strategy is not to compete against them” (Interview 51). Instead, remedies to combat threats from Protestantism focused on strengthening outreach programs and building a sense of community. “What we want to bring is formation and communion to the community so that they feel part of the church and part of something, like a family” (Interview 11).

Catholic Charismatic Renewal has been used within the Archdiocese, but at the periphery. It has grown outside the formal Church hierarchy, many priests dislike it, and its geographic influence is generally limited to the city of Mérida. The extent to which it is practiced is entirely dependent on parish priests. The Archdiocese formally adopted the movement, but only for the purpose of limiting and controlling it (Vázquez Pasos 2008, 188-196). Furthermore, its influence appears to be waning.<sup>62</sup> Instead of charismatic

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<sup>61</sup> Catholic officials also noted that the aggressive manner Protestants attack the Catholic Church has been an effective conversion strategy (Interview 11; Interview 23). Another prominent explanation was that the United States had intentionally encouraged the movement of Protestant missions into Latin America during the last half of the 20<sup>th</sup> for fear of communist sympathy in the Catholic Church (Interview 11; Interview 63; Interview 69).

<sup>62</sup> From email correspondence with Professor Vázquez Pasos, 2013, see Vázquez Pasos 2008.

Catholicism, the priests I interviewed modeled ritualistic practices off of popular forms of devotion. The Church uses “a little bit of [the people’s] methods – what we call ‘popular devotion.’... The people like processions, having images blessed, and having their homes blessed” (Interview 11).

Finally, Trejo suggests that mainline Protestant religions were more popular in Chiapas, while Pentecostal religions that emphasized spiritual gifts were more popular in Yucatán. In reality, both states have nearly exactly the same proportion of Pentecostals as a percentage of non-Catholics. In Chiapas, 15.5% of non-Catholics self-identified as Pentecostal, while in Yucatán 15.8% of non-Catholics self-identified as Pentecostal (INEGI 2010). Self-identified Pentecostals constitute essentially the same proportion of overall religious competitors to Catholicism in Yucatán as in Chiapas, and it is unclear why the hierarchy would be compelled to adopt a substantially different strategy to respond to Protestantism in Yucatán than it would in Chiapas.

Despite experiencing high rates of Protestant growth, religious elites have not encouraged political activism in Yucatán. Yucatán accordingly appears to be a difficult case for theories of religious competition. However, it might be argued that religious competition did not prompt political activism in Yucatán because the specific form of Protestant competition prompted liturgical imitation of Pentecostal practices. I find little evidence to support this proposition. Church officials in Yucatán do not point to Pentecostal practices as providing particular appeal to converts, and these practices have not become adopted in a mainstream manner throughout the Archdiocese. In short,



religious competition does not seem to explain the general absence of indigenous or political activism in Yucatán.

### *Church/State Relations in Yucatán*

Finally, one might point to repressive histories of interaction between the church and state as a potential impediment to political activism. Where we see a greater history of church/state conflict, we would expect that religious institutions play a diminished role in prompting political activism (Fetzer and Soper 2005; Chand 2001, 160). However, there is little reason to believe that the Church/State relationship in Yucatán is repressive. The Cristero War had little impact in Yucatán, which was far to the periphery of Mexican politics during the 1920s and 1930s. Accordingly, the Archdiocese of Yucatán should have had a great deal of space to work for social reform. However, despite experiencing little repression, the Archdiocese of Yucatán has not taken advantage of this space to do so.

Several priests I spoke with suggested that the relationship between the government and the Church is one of prudential respect (Interview 11; Interview 23; Interview 24). In point of fact, one might characterize the relationship as an informal partnership. For example, one priest related that relations between the Church and state are “separated, but now there are no confrontations. On the contrary, the Church always looks for the support of civil authorities and politicians for things that the Church cannot finance itself” (Interview 11).

Priests painted a picture of collaborative exchanges between the Catholic Church and the state. “They give us support for activities, and [the relationship] is close and

prudent” (Interview 23). At the same time, these exchanges tend to be through informal personal networks rather than through formal institutional channels. “There are links, but they are personal and not between institutions ... The current municipal president is from the PAN party<sup>63</sup> ... He asks advice and I give him a little. Of course he does whatever he wants” (Interview 51). An official I spoke with from the DIF suggests that “we have big connections with the Catholic Church through the Director and me. The two of us work in the Catholic Church here” (Interview 49).

Despite this apparently cordial relationship, priests in Yucatán are cautious when speaking publicly about anything that could be considered to be political (Interview 23; Interview 11; Interview 51). “You have to be very careful now, because of the elections. The people are very sensitive, and anything you say can offend or be interpreted as favoring a particular party” (Interview 23). Furthermore, Mexican politicians are not above using priests in an effort to gain votes. “During political campaigns, the candidates look for the sympathy of Catholics .... For example, in one of the communities I oversee, the Municipal President ... offered 15 new benches for the Church in order to gain support for the party before elections. ... As the majority are Catholics, it’s a way to win” (Interview 11). Another priest stated that “the little chapel that we are making right now - they offered to help the work on it even though I didn’t ask for it. I try to keep distance” (Interview 51). As a result, priests’ pronouncements on politics appear to be

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<sup>63</sup> Indeed, there is a popular perception of a strong link between the PAN party and the Church. It is possible this could influence political participation in regions demonstrating higher levels of PAN political strength, though scholars generally downplay a strong contemporary Church/PAN link, despite the PAN’s Catholic origins (Camp 1997; Loaeza 2003; Loaeza 1999; Camp 2007, 90; Camp 2008; Blancarte 2006; Mizrahi 2003; Magaloni and Moreno 2003; Dominguez and McCann 1995; Wuhs 2013).

limited to subtle policy references. One priest explained that he tells his parishioners to “vote for the party that agrees with [their] convictions and conscience” (Interview 11).

Though some theories suggest that religious institutions that have not been marked by church/state conflict have more room to prompt political activism, such theories appear to do little to explain variation in political activism between Chiapas and Yucatán. There is little conflict between the local governmental authorities and the Archdiocese of Yucatán. Mexico’s contentious historical relations do not appear to have severely afflicted relations between church and state, and Yucatán is not marked by a repressive relationship with civil authorities. Despite this space, the Church is hesitant to speak out on political matters and, as demonstrated throughout this chapter, the Church has not prompted political activism by laity.

### *Conclusion*

Despite possessing a large indigenous minority with a distinctive and singular ethnic tradition, debilitating rural poverty, and a relatively large level of Protestant competition, indigenous activism has not developed in the Mexican state of Yucatán. In fact, little political activism has developed of any kind. This dissertation posits that the centralized governance of the Catholic Church has played a distinctive role in explaining why.

Unlike Chiapas, the Archdiocese of Yucatán is highly centralized. The Church has attempted to expand the participation of its laity through pastoral councils and small Christian communities, but directives flow from the top down. The religious laity dutifully accept orders but possess few decision-making responsibilities. Furthermore, the

economic cooperatives that have facilitated monitoring and sanctioning by laity in Chiapas have been thoroughly discouraged in Yucatán. Networks of reciprocal interaction have not developed, nor has an organizational base facilitating political activism.

This chapter also assessed a variety of competing explanations for the lack of political activism in Yucatán. The argument might be made that economic diversification in Yucatán and the growth of Cancún as a tourist destination have dampened economic hardship. However, such an argument overlooks the rural poverty of Yucatán and the massive economic displacement of thousands of peasants throughout the 1980s and 1990s. Despite possessing economic hardship similar to Chiapas, indigenous peasants have not organized *en masse* in defense of their interests in Yucatán. Though the case has been made that henequen production provided Yucatecan citizens with less autonomy from the corporatist state than in Chiapas, this argument is less successful at explaining the lack of political activism in the non-henequen production zones to the east and south of Yucatán.

Political competition, on the other hand, has almost certainly muted political activism in a manner contradictory to received wisdom. As Mexico opened politically throughout the latter part of the 20<sup>th</sup> century, Yucatán's political system was relatively competitive compared to other states. While one would expect that this would open up political space for political engagement, in reality transfers of power between parties have dissuaded political activity. State governments control the distribution of federal resources across the state and have shown a propensity to withhold funds from

municipalities controlled by opposition governments. Municipal authorities have also shown a propensity for withholding funds from individuals known to consort with the political opposition. This makes political activism an economically tenuous proposition in the poor rural countryside. However, as illustrated by the examination of Chiapas in the previous chapter, similar, if not worse, relations between competing political parties have not prevented political activism there. Accordingly, political competition does little to explain variation in political activism between Chiapas and Yucatán.

Additionally, theories linking ethnic homogeneity with the provision of public goods fail to explain differentiation in political activism between the two states. One would expect ethnic fractionalization to be linked to diminished public goods provision, but in this case it is ethnically fractionalized Chiapas that has experienced political activism rather than ethnically homogeneous Yucatán. Furthermore, though the Church hierarchy has not embraced liberation theology in Yucatán as it did in Chiapas, it has been marked by increased ideological progressivism under Archbishop Berlie Belaunzarán. However, this progressivism has not been met with organizational decentralization or, subsequently, political activity in the Archdiocese.

Additionally, Protestant competition has difficulty explaining variation in political activism between Chiapas and Yucatán. While Chiapas has the highest rates of Protestant competition in all of Mexico, Yucatán has also experienced dramatic Protestant growth. Contrary to Chiapas, it has not experienced political activism. I find little evidence supporting the contention that the Catholic hierarchy in Yucatán attempted to compete with Protestants by adopting Pentecostal liturgical practices. Finally, historically

contentious relations do not explain variation between Chiapas and Yucatán. Both were at the periphery of the Cristero conflict, and the Archdiocese of Yucatán suffers little repression at the hands of civil authorities. Nevertheless, the clergy in the Archdiocese are reluctant to speak out on political matters.

The centralized Archdiocese of Yucatán has not prompted political activism in Yucatán. Chapters 5 and 6 have discussed the development of political activism by indigenous communities. To ensure nothing particular to indigenous communities drives the results of the qualitative comparison, this dissertation now turns to briefly examine a shadow-case of political activism in the non-indigenous setting of Morelos. Here, the Catholic Church decentralized governmental authority to laity and prompted political activism in the Diocese of Cuernavaca.

## Chapter 7

### THE DECENTRALIZED CATHOLIC CHURCH IN MORELOS

Chapters 5 and 6 examined the relationship between religious decentralization and political activism in a controlled qualitative comparison of Chiapas and Yucatán. Chiapas has been marked by a great deal of political activism by indigenous communities, while Yucatán has been marked by very little. The comparison demonstrated that variation in religious decentralization accounted for variation in political activism between the two states. To ensure the results of the comparison are not driven by any factors particular to indigenous communities or indigenous activism, this dissertation now briefly examines the Mexican state of Morelos, which has a relatively small indigenous presence. 2.3% of the population of the state speaks an indigenous language, well below the Mexican national average of 7.1% (INI-CONAPO 2000). Here, Bishop Sergio Méndez Arceo decentralized authority to the laity of the Diocese of Cuernavaca, enabling political activism.

As detailed in this shadow case study of Morelos, the Diocese of Cuernavaca decentralized monitoring, sanctioning, and decision-making authority to the laity beginning in the 1950s and 1960s. Decision-making was decentralized through Christian base communities (*comunidades eclesiales de base* – CEBs) that, similarly to catechists and deacons in Chiapas, encouraged the laity to reflect independently on biblical teachings and to develop their own themes for analysis within small Christian study groups. Just as in Chiapas, local monitoring and sanctioning capacities were provided through economic cooperatives. These cooperatives were not only a prominent

component of the Christian base communities in the Diocese of Cuernavaca, but in Latin America as a whole. The organizational framework of the CEBs enabled independent political movements in Cuernavaca beginning in the 1970s along, most notably, issues of worker's, teacher's, and peasant's rights. They have supported a host of other political issues as well. Just as in Chiapas, ideologically committed laity played an important role in prompting larger levels of cooperation from others.

Given its unique history, Morelos also provides an intriguing opportunity to observe the consequences of religious *centralization* after having experienced decentralization. By Sergio Méndez Arceo's mandatory retirement as Bishop of the Diocese of Cuernavaca in 1982, John Paul II had become Pope and was determined to reign in the popular church. As a result, the Vatican has appointed a successive line of conservative bishops in Morelos. These bishops have actively sought to marginalize the CEBs within the Diocese. They have also revoked participatory pathways for the laity within the Church. Despite these efforts, the organizational base developed by decentralization has maintained a strong presence in Morelos. It has been able to function autonomously without the institutional support of the Diocese, and it continues to support political activism in Morelos.

This chapter first gives a brief overview of the state of Morelos and a summary of the independent political movements that emerged in Cuernavaca beginning in the 1970s and 1980s. I continue with a description of the decentralization of monitoring, sanctioning, and decision-making authority to the laity through Christian base communities (CEBs). These CEBs directly provided both organizational and social



support to powerful independent movements that voiced their political demands to the state and private enterprise throughout Morelos and, particularly, in Cuernavaca. I then describe the subsequent recentralization of the Diocese of Cuernavaca and its ramifications for political activism in Morelos.

### *The State of Morelos*



Figure 8: Map of Morelos. “Morelos, Mexico.” Map. *Google Maps*. Imagery © 2013 TerraMetrics, Map data © 2013 Google, INEGI. Accessed 11 June 2013. Web.<sup>64</sup>

Morelos lies just to the immediate south of Mexico City. It is divided from Mexico’s Federal District by the Sierra de Chichinautzin mountains. It is also bordered by Puebla to the southeast and Guerrero to the southwest. Morelos is marked by varying

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<sup>64</sup> See Appendix F for Google Maps’ rules and guidelines for use of copyrighted content.

topography and both mountainous and flat terrain. Unlike Yucatán and Chiapas, it is centrally located and has not developed at the periphery of Mexican politics. Because of its close proximity to Mexico City, Morelos' history is not characterized by distance from the federal government as are the histories of Yucatán and Chiapas. There has been less potential space for the development of independent political movements. "In the State of Morelos, it's more difficult to participate ... Above all, it's difficult to participate in [independent] organizations" (Videla 1984, 99).<sup>65</sup>

The municipality of Cuernavaca has a population of around 338,700 (INI-CONAPO 2000). It is located in the northwest portion of Morelos, and it is only 60 miles from Mexico City. It is the commercial center and capital of Morelos. As previously demonstrated, it is characterized by a relatively small indigenous population. Indigenous dialects are spoken by only about 1.5% of the population.

#### *Independent Organizing in Morelos*

Morelos is the second smallest state in Mexico, and it ranks 23<sup>nd</sup> among Mexico's states (including the Federal District) in population. Despite its relatively small size, it has one of the highest concentrations of civic organizations in Mexico (González Vázquez 2001, 7). As one interview respondent explained, "Cuernavaca is a city with a curious trajectory of social movements ... that has developed since around the beginning of the 1980s" (Interview 14). In point of fact, a variety of independent movements have taken place across the state since the 1970s. It was during the early 1970s that a vibrant independent workers' movement emerged in the automobile and industrial sectors. This

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<sup>65</sup> Quoting Bishop Sergio Méndez Arceo

movement successfully managed to install democratic unions independent of the Mexican state. Teachers' and textile workers' movements managed to amass tens of thousands of protesters in defense of social justice and in protest of federal austerity measures in the early 1980s. Peasant movements throughout the countryside have also been pronounced (Concha Malo et al. 1986, 249; Mackin 1997, 32; González Vázquez 2001, 7).

Like Chiapas, much of the literature attributes the growth of civic movements in Cuernavaca to the influence of the Catholic Church and Bishop Sergio Méndez Arceo, Bishop of the Diocese of Cuernavaca from 1952 to 1982 (Concha Malo et al. 1986, 249; Mackin 1997, 32; González Vázquez 2001, 7; Healy 2008; Videla 1984). As we have already seen, the level of religious decentralization explains the variation in political activism between indigenous communities in Chiapas and Yucatán. This chapter demonstrates that religious decentralization was similarly responsible for the development of political activism in the non-indigenous context of Morelos.

#### *Decentralization in the Diocese of Cuernavaca*

Like the Diocese of San Cristóbal de las Casas in Chiapas, religious decentralization in the Diocese of Morelos was undertaken by its progressive bishop, Sergio Méndez Arceo. Decision-making authority was granted to the laity primarily through Christian base communities (CEBs) that created small Christian communities of between 10 and 20 individuals. Individuals within these groups conducted their own bible studies and established their own themes for discussion. The Diocese, even prior to the Second Vatican Council, made a concerted effort to open lines of dialogue to the laity to give them a voice in parish affairs.

As occurred in Chiapas, monitoring and sanctioning were provided by economic cooperatives and economic support networks created by the Diocese and its religiously-committed lay agents. What also makes the Diocese of Cuernavaca an intriguing case, however, is that it provides an opportunity to examine the consequences of religious *centralization* following decentralization. Following the retirement of Bishop Sergio Méndez Arceo in 1982, the Vatican posted a successive line of conservative Bishops in the Diocese of Cuernavaca. These bishops have actively worked to recentralize the Diocese. Despite their efforts, the decentralized framework of lay activism has remained remarkably intact over thirty years. At the same time, decades of neglect and antagonism by the institutional church are taking a toll, primarily through the loss of recruitment opportunities offered by the institutional Diocese. The result has been a gradual erosion of CEB influence in civic affairs, although they continue to have a strong presence.

Sergio Méndez Arceo arrived to Cuernavaca as its bishop in 1952. He was conservative, disciplinarian, and marked by authoritarian tendencies during his first several years in the Diocese (Mackin 1997, 34-35). One Mexican historian suggests the development of the Church under Sergio Méndez Arceo proceeded under a variety of phases. The first phase, from 1952 until 1957, was marked by an emphasis on traditional seminary. Méndez Arceo emphasized study and intellectual preparation. Little effort was put into diocesan decentralization. The second phase, beginning in 1957, was very different. Increasingly influenced by several priests within his Diocese, Méndez Arceo began the process of decentralization. He and his supporters instituted liturgical innovations that allowed the laity to participate more actively in mass. Most critical in

this regard, however, was the development of Christian base-communities that gave laity decentralized decision-making, monitoring, and sanctioning responsibilities. The third phase, beginning around 1968 and lasting until Méndez Arceo's retirement in 1982, was marked by increased political engagement by the Diocese (Videla 1984, 93).

As in Chiapas, decentralized decision-making allowed local communities to develop an autonomous agenda for action within the religious institution. Laity were given the autonomy to develop their own themes for discussion. Though activism certainly grew around the socioeconomic concerns of *campesinos*, Morelos' growing urban class also focused discussion on worker's rights.

Beginning in the late 1950s, Méndez Arceo took the first steps toward decentralizing the Diocese. His goal was to open up decisions to the laity. Like Samuel Ruiz García in Chiapas, Méndez Arceo worked to make the religion more accessible to his parishioners. First, mass was revolutionized. Ten years prior to the Second Vatican Council's official pronouncements to conduct mass in vernacular languages, Spanish was implemented as the language of mass in certain parishes in the early 1950s. The express intent was for laity to understand the liturgy and participate in it (Mackin 1997, 33-36). Furthermore, innovations were made in the main Cathedral to make the mass more accessible to the laity. Rather than facing the wall, the altar was moved to face parishioners so that clergy would no longer perform particular liturgical ceremonies with their backs to parishioners, as had been common prior to Méndez Arceo's renovations (Interview 61).<sup>66</sup>

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<sup>66</sup> Like Samuel Ruiz, Méndez Arceo attended the Second Vatican Council. Méndez Arceo brought a radical voice with him to the Council, a Benedictine monk named Gregorio Lemercier. The Bishop was

To further engage his parishioners, Mendez Arceo and his collaborators introduced the “mariachi mass” in the mid-1960s in which the musical celebrations were performed in popular Mexican styles. The intent was to encourage direct participation in the mass (Suarez 1970, 23-24). Finally, and perhaps most radically, Mendez Arceo distributed Protestant Bibles to his parishioners so that they could take them home and use them to form their own small bible study groups. These efforts began in the early 1960s. By the 1980s, Sergio Méndez, his clergy, and his lay supporters had distributed more than 70,000 bibles across more than 500 Christian base communities (Mackin 1997, 63; Videla 1984, 39).

The innovation of Christian base communities is of particular importance. The CEBs became prominent fixtures across many Catholic dioceses in Latin America, and they were particularly pronounced in Morelos. Though small communities of believers had been studying the Bible autonomously in Cuernavaca since the early 1960s, the CEBs were formally introduced in the Diocese of Cuernavaca in 1966. Two years later, their use became officially endorsed by the Second Latin American Episcopal Conference (CELAM II) in 1968 across Latin America. Although many of these groups would eventually become politicized, “the groups that were started in Cuernavaca were [initially] not very political” (Mackin 1997, 63). Indeed, according to Daniel H. Levine in a historical overview of the growth of Christian base communities in Latin America,

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accordingly one of the voices driving change at Vatican II (Mackin 1997, 37-38). Both Lemercier and another radical priest named Ivan Illich exerted a great deal of influence over the Bishop and, subsequently, the manner in which the Diocese of Cuernavaca operated (Mackin 1997, 35, 59).

these groups were generally formed to strengthen religious communities rather than to become igniters of political activism (Levine 1988, 255).

The CEB's were typically small and homogenous groups that stressed an association with the institutional church. They generally consisted of 10 to 30 individuals who were related in some way, either as family, friends, neighbors, or co-workers (Videla 1984, 93). They met at least once a week in someone's home and discussed both the Bible and their common concerns (Levine 1988, 251). Members were encouraged by clergy to reflect on the teachings of the Bible and to develop their own themes for discussion. Indeed, these were largely self-directed, as one of my interview respondents explained:

“[In CEBs, you] meet once a week. It doesn't have to be Saturday or Sundays. It could be on Tuesdays if you want. You could ... have it at one family's house one week, and then do it someplace else. [You] sing hymns, read from the bible ... you're going to do it on your own – There's not going to be a clergy person there. There won't even be a nun” (Interview 61).

Accordingly, the role of the priest within these communities transitioned from an authoritative role imparting theological doctrine to an “advisory” role encouraging autonomous religious reflection by the laity (Videla 1984, 98). In meetings with clergy and even with the bishop (outside of mass), parishioners were allowed to set the agenda for discussion (Videla 1984, 97).<sup>67</sup>

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<sup>67</sup> Méndez Arceo did not implement a deaconate program in Cuernavaca in a similar manner as Samuel Ruiz in Chiapas. While the ambitious deaconate program in Chiapas developed in the 1970s, Méndez Arceo was nearing his mandatory 1982 retirement and, as will be discussed, consolidating the innovations he had made in the face of a likely conservative successor. It is worth noting that a major ideological

The CEB's grew dramatically. By the middle of the 1970s, there were more than 700 scattered throughout the Diocese. Political analysis came gradually and centered on the perspective of the poor. "The key to this new mode by the Church is that the base Christian groups use their own resources and organization to solve their problems. They exchange their own experiences and feelings over reality. They help each other mutually and mitigate the sensation of economic, social, and political insecurity that each member of society suffers" (Videla 1984, 94).

As the previous quote suggests, a key focus of the CEB's was on the "*lucha para la vivencia*:" the fight for a living (Interview 7). Religiously-committed laity, as in Chiapas, created a wide range of cooperatives that were embedded directly within the CEBs. These groups were designed to aid in the economic development and sustenance of CEB members, and they included savings, consumer, and production cooperatives (Interview 7). They were predicated on mutual responsibility and reciprocity. Their small size facilitated monitoring and sanctioning when necessary.

The groups gave measureable, and excludable, economic benefits to their members as they worked to achieve specific economic ends. "It gives a benefit to our families when we sell our products – it's something else that helps to sell the products" (Interview 7). Within these community groups, cooperative members shared amongst themselves, but the fruits of the labor was restricted to contributors. "Those who produce

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impetus for the deaconate program as it would come to be practiced in Chiapas came directly from the Diocese of Cuernavaca through one of Méndez Arceo's own favored intellectual clergy, Ivan Illich (Suarez 1970, 151-154).



are all given in an equal manner amongst themselves, according to cooperative principles” (Interview 7).

The consumer cooperatives in Morelos were similarly dependent on reciprocity. In one such cooperative arrangement, families rotated on a monthly basis to make bulk purchases at better prices benefitting the community. One family would pay a substantial amount of money one month to provide basic consumer goods for members and then would benefit in subsequent months as other families did the same (Interview 7). Similar to rotating credit associations, these cooperative groups were seemingly susceptible to opportunism by families who could “defect” by taking advantage of those families who had made previous purchases and defaulting on their obligations to make purchases once their turn came. The fact that families were willing, however, to stake relatively large sums of money spoke to the confidence that members had in other members of the CEBs that their contributions would not be exploited (Hechter 1987, 107-111, Putnam 1993, 168-169; Vélez-Ibañez 1983; Interview 7).

To briefly suggest that the findings of the study expand even further, similar economic cooperatives were common in decentralized Christian base communities throughout Central and South America (Levine 1988, 253). The CEBs prompted a wide range of common cooperative economic endeavors across Latin America. “The federation of peasant cooperatives in Paraguay, ... soup kitchens in Chile, various groups of popular education in Peru, or committees for the defense of peasants in the northeast of Brazil have been born from these [Christian base] communities, through the reflection of the lessons and values of the Bible” (Videla 1984, 99).

Within Chiapas, Cuernavaca, and throughout many other locations in Latin America:

“the people come together and in most cases work cooperatively to remedy problems, obtain services and accumulate resources ... over and over again [there is] discussion of how people got together to build schools and houses and clinics, gather funds to support teachers and nurses, established production and consumer cooperatives ... [these topics] were obviously of greatest interest to the members of the CEBs as they dealt with very concrete matters which made a big difference in how they lived. In this sense the people in the CEBs are promoting their own development at the grassroots and this is all the more important because of the general absence of this tradition of self-help in most regions of Latin America” (Bruneau 1980, 245).

*The Development of Independent Organizations in Cuernavaca*

The CEBs directly contributed to the political activism that emerged in Cuernavaca in the 1970s (Mackin 2003, 508; Videla 1984, 22; Concha Malo et al. 1986). In 1969, the Union Training Center in the State of Morelos (*Centro de Formación Sindical en el Estado de Morelos - CEFOSEM*) was formed. This organization consisted of a coordinated movement by workers in Cuernavaca’s automotive and other industrial sectors to challenge the established and corrupted union structure that was embedded within the Mexican state. Its members sought to form their own democratically elected union leadership. Importantly, CEFOSEM grew from the CEBs. Much of its leadership consisted of members of small Christian communities (Healy 2008, 51-52), and the mode of instruction within CEFOSEM was predicated precisely on the “See-Judge-Act” methodology that had been actively taught within these small lay religious groups (Mackin 2003, 506-507).

The development of the independent labor movement in Morelos once again illustrates the potential of religious decentralization to create unanticipated political

consequences. As previously noted, Sergio Mendez Arceo was a conservative bishop when he arrived to Cuernavaca in 1952. Though he slowly became known for his ideological progressiveness throughout the 1950s and 1960s (Videla 1984, 24), Méndez Arceo was still considered at the turn of the 1970s to be a friend to big business. The bishop saw himself as an intermediary between workers and industrialists (Mackin 2003, 508), and he had been known to critique the work ethic of laborers. One quote from the Bishop speaking to the organizers of the CEFOSEM school is telling: “Yes, go ahead. Struggle to get a better salary. But also, do your duties as workers because I know you are lazy and irresponsible. You break the machines” (Healy 2008, 52).

As a result, independent organizers in the labor sector, despite having developed in the CEBs, lacked confidence that the Bishop sided with them. After Bishop Méndez Arceo spoke with striking textile workers, for example, laborers responded skeptically that he was only trying to get them to go back to work (Interview 61). He was challenged, by the same organizations that religious decentralization had helped to spawn, to spend more time with the workers and to get to know their point of view (Interview 61, Healy 2008, 52). It was only after doing so that Méndez Arceo eventually came to give the Diocese’s unconditional support to the independent labor movement (Mackin 2003, 52). The Bishop had set the seeds for his own radicalization unintentionally by enabling the political activism of his laity through religious decentralization.

As the 1970s continued, CEFOSEM became a powerful force demanding workers’ rights through strikes and marches. The labor movement found political support through the network of CEBs. These CEBs provided food and moral support to strikers,

collected donations, and spread information about the workers' cause (Healy 2008, 52). By 1976, however, the state, its official unions, and local law enforcement had organized a repressive response to the movement. The subsequent disbursement of marches, disruption of organizational networks, and blacklisting of organized laborers forced many out of Cuernavaca to seek work and eventually quelled the labor movement (Healy 2008, 63; Mackin 1997, 83). While the movement was stifled by the end of the decade, it successfully managed to remove the state-sponsored union in exchange for an independent and democratic one (Mackin 1997, 83).

Such political movements were not limited to the industrial sectors. By the end of the 1970s and 1980s, textile workers and teachers movements mobilized to become significant political forces in the region. They organized hunger strikes and marches forty thousand strong in Cuernavaca's central square in 1981. By 1982, the movement had grown to include protests against Mexico's economic crisis and austerity policies (Healy 2008, 63-64). Just as in the case of the industrial and auto workers, CEBs played critical supporting roles to these movements by providing the organizational and social base of their support and by providing willing participants to protest (Concha Malo 1986, 249-251). They played similarly important roles in community development and peasant groups (Concha Malo 1986, 251 - 256). Additionally, these communities also received political refugees from South and Central America during the political tumult of the 1970s and 1980s. One organization I spoke with formed from the CEBs in order to educate the people about international problems. Today, it serves as a language school (Interview 15), and the CEBs are also active in environmental issues (Interview 14).

### *Retrenchment*

In 1982, Sergio Méndez Arceo was obliged to retire as Bishop of Cuernavaca. The Catholic Church had set a mandatory retirement age of 75 for all bishops during the Second Vatican Council (Mackin 1997, 96). The Bishop correctly perceived that his predecessor would enact a conservative retrenchment of his pastoral initiatives. Méndez Arceo had antagonized a large portion of Morelos' traditional Catholics with his radical liturgical reforms. While he had initially held the support of the industrialists and economic elites of Cuernavaca, this disappeared once he supported the independent workers' movements (Videla 1984, 25; Mackin 2003, 506).

More importantly, John Paul II took on the mantle of Pope in 1978. The new pope sided with conservatives within the Vatican who believed that the "popular church" had grown to oppose traditional hierarchical leadership and needed to be reined in (Levine 1988, 254). Although a norm generally allowing bishops to continue at their posts past the age of 75 had been established, Arceo Méndez was informed he would not be permitted to remain as Bishop of Cuernavaca by Vatican officials (Mackin 1997, 96-97). Subsequently, the Bishop and his supporters made the CEBs as independent as possible from the institutional Church. They gained funds from foreign lenders to develop an organizational headquarters centered in Cuernavaca that would continue to coordinate and support the development of the CEBs throughout Morelos. (Mackin 1997, 95)

These measures proved necessary. Méndez Arceo's predecessor acted to re-centralize the authority of the hierarchical Catholic Church. "There came, as a strategy of the Vatican ... a bishop who was very reactionary – that came to break the structure that

Don Sergio had generated” (Interview 7). “The new bishops have done everything possible to revert what Méndez Arceo did” (Interview 61).

Méndez Arceo’s immediate predecessor, Juan Jesus Posadas Ocampo, slowly and quietly reassigned progressive priests while bringing in conservative priests. He closed Sergio Méndez Arceo’s seminary, cancelled the Dioceses’ monthly meetings with laity, and attacked the independently organized CEBs for being what he described as divisive and political. The Diocese also sought to ignore and isolate the CEBs from the institutional church hierarchy (Mackin 1997, 98-99; 103-104; Interview 7).

In many respects, however, the conservative hierarchy’s strategy was ineffective. Immediately upon Méndez Arceo’s retirement, the CEBs enacted a massive independent membership drive that swelled their ranks from 700 to over 900 groups (Mackin 1997, 104). By the end of the 1980s, the Diocese and the CEBs had developed their own *modus vivendi*. The Diocese was content to marginalize and isolate the CEBs away from the institutional Church, and the CEBs viewed themselves as completely independent of it (Mackin 1997, 104-105). The CEBs have continued supporting independent political movements in Morelos. They are actively involved in human rights and they contribute to a wide variety of social movements (Mackin 1997, 83; Interview 7, Interview 14, Interview 61).<sup>68</sup>

At the same time, the passage of time has slowly diminished their impact. Years of neglect by the institutional church, the inevitable aging of original CEB membership,

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<sup>68</sup> The communities were also aided by the presence of Méndez Arceo, who remained active in the social life of Cuernavaca. He met each Tuesday with lay CEB leaders and with his supporters within the institutional Church. He maintained an active presence in Cuernavaca until his death in 1992 (Mackin 1997, 97; Interview 7).

and the passing of Méndez Arceo in 1992 have taken a toll on their effectiveness. “There is still a network, but it’s not what it once was. They continue pretty much on their own, without much, or any, support from the Diocese” (Interview 61). “There are fewer communities. Many [CEBs] work at the margins of their parishes. The priests didn’t want them. It had passed from style” (Interview 7).

Because of their diminishment, the CEB organizer I spoke with mentioned that civic associations in Cuernavaca are increasingly dominated by political parties or businesses. My own (non-representative) interviews suggest that current associations in Cuernavaca tend to be spearheaded by expatriates from other countries with paid Mexican staff (Interview 47; Interview 6; Interview 58; Interview 59), run by economically well-off retirees (Interview 35), or receive government funds (Interview 34; Interview 60). At the same time, several of the groups I spoke with had either developed directly from the CEBs or were supported in their political goals by them (Interview 15; Interview 7). Though they have diminished, they are still a pronounced political presence in Morelos.

### *Conclusions*

Within this brief shadow case, I have demonstrated that the Diocese of Cuernavaca decentralized monitoring, sanctioning, and decision-making authority to the laity beginning in the 1960s. Morelos has a small indigenous population, and its inclusion in this study aids in assuring that the findings of the qualitative comparison in the preceding chapters was not the result of particular characteristics of indigenous communities or indigenous political activism.

Decentralized decision-making occurred through Christian-base communities where individuals met in small local groups to study the Bible and develop their own themes for discussion. Parishioners often set the agenda for discussion in meetings with the hierarchical clergy. Monitoring and sanctioning were provided in a similar manner as Chiapas through economic cooperatives. The club goods provided played a noticeable material improvement in the lives of members and prompted reciprocal interaction. By the 1980s, more than 500 of these Christian base communities operated throughout Morelos, and they were powerful actors in the independent movements that developed in the 1970s and 1980s.

The independent worker's movement, for example, developed directly out of the organizational framework provided by the CEBs. Here, diocesan decentralization had the unanticipated consequence of fully aligning the Bishop Méndez Arceo with the poor. Throughout the 1960s, he had seen himself as a mediator between workers' groups and powerful industrialists. He was known to socialize with the powerful elements of Cuernavacan society. However, the very activism that his decentralization had enabled caused him to reconsider his position, and he threw the full weight of the Diocese behind the workers in the 1970s. The CEB's further played important roles in the teacher's movements and peasants movements throughout Morelos during the 1980s.

Again attesting to the uncontrollable power of decentralization once unleashed, attempts at centralization by the Diocese have served only as a slow, though steadily increasing, impediment to the work of CEBs. The CEBs have continued to support a number of political movements following Méndez Arceo's retirement. However, the



Diocese has consistently worked to marginalize them, and new parishioners are not directed to them as viable pathways of participating in the Church. Members of the CEBs have become older. While many of the original organizations created by them remain, CEBs have diminished in strength over the years. As a result, the landscape of civic organizations is slowly transforming to one in which expatriates, political parties, and government have greater influence.

This dissertation has developed a theory suggesting religious decentralization is linked to increased levels of political activism. This theory has been modeled through computational simulation and tested empirically through large-N statistical analysis and qualitative case comparisons. I now conclude with a restatement of the main theoretical contributions of this study and a summary of its main findings and implications.

## Chapter 8

### CONCLUSIONS

We have recognized since at least Alexis de Tocqueville's study of democracy in the United States that religion impacts political activism. The scholarly literature widely maintains that religiously committed individuals are more likely to engage in political behavior, and that religion often provides institutional resources that are essential to the development of collective action.

At the same time, we lack a well-specified theory that gives agency to the laity who mobilize politically and that also explains the conditions under which religious institutions can be expected to prompt political activism. Neither resource mobilization, ideological, nor rational theories describing religion's impact on collective action have explained how mainstream religious institutions develop the capacity of the laity to overcome collective action problems associated with political activism.

This chapter first restates the primary argument of my dissertation. Where religious institutions are characterized by lay monitoring, sanctioning, and decision-making, communities are subsequently marked by heightened capacities to engage in political activism. During this discussion, I restate the findings of my agent-based model. I then briefly reintroduce alternative explanations that might also explain variation in political activism. Following this discussion, I describe the quantitative and qualitative assessment of these theories. Finally, I review the findings emerging from these empirical tests and conclude by discussing the implications of this research.

### *Restatement of Theory*

This dissertation has conceptualized political activism as a public good. In order to engage in protest or associational activities, individuals must give of their time, money, and potentially even of their safety. The benefits of political activism are non-excludable. They accrue to all whether or not everyone has paid the costs to produce them. Accordingly, all have an incentive to free-ride off the efforts of others. As a result, political activism is often difficult to achieve.

The primary theoretical argument of this dissertation has been that where religious institutions are characterized by decentralized lay monitoring, sanctioning, and decision-making authority, communities are marked by heightened capacities to engage in political activism. Decentralized decision-making gives individuals a forum to discuss and formulate solutions to local problems. It allows them to drive their own autonomous agenda for action. Religious decentralization also places individuals in smaller local communities that can more efficiently monitor and sanction the behavior of others. Effective monitoring by religious members aids in identifying opportunists. If these opportunists are caught, the community possesses sanctioning authority to exclude them from the benefits of group membership. The identification and isolation of opportunists gives others greater assurance that the individuals they interact with can be expected to cooperate rather than defect.

Accordingly, such monitoring and sanctioning allows reciprocal exchange to grow. As the value of the religious club good provided increases, more individuals have incentives to participate in its production. This encourages increased participation in the

religious club, which further increases the club's material output. The result is a virtuous circle of increasing reciprocal exchange. As a result, individuals learn to anticipate reciprocity from others. The costs of building a local organizational base along with exclusionary mechanisms of control are established, facilitating contributions to the public good of political activism.

Religiously-committed individuals have an important role to play in this regard. A wide body of empirical evidence suggests that there is heterogeneity in social-preferences. This is to say that often pro-social individuals can be expected to cooperate even if such cooperation results in a detrimental payoff. Religion has been demonstrated to positively affect such pro-social tendencies in some individuals. When combined with institutional decentralization, these individuals provide initial contributions to club goods, increasing their value and enticing contributions from others. They provide kindling in the development of sustained cooperative interactions.

Agent-based modeling is utilized by the study because it has the capacity to model the complexity implied by the theory as individuals' decisions are influenced by feedback, heterogeneity of preferences, and adaptation. Furthermore, it is difficult to gather direct empirical evidence regarding the day to day cooperative interactions of individuals. Agent-based modeling has the capacity to simulate the nuances of these interactions in a manner that can produce clear empirical predictions of behavior that evolves from these interactions. These predications can then be tested by empirical evidence.

I developed an agent-based model that specified how religious institutions influence the incentives of individual laity to engage in political activism. The model examined the interactions of individual agents participating to produce either religious club goods or political activism, a public good. Religious decentralization was systematically varied in computer experiments suggesting that it has a positive impact on political activism. This relationship is elicited as decentralization causes agents to anticipate heightened probabilities that their cooperation will be reciprocated by others. As individuals become more willing to interact, they make contributions to club goods. The bonds of reciprocal exchange and the organizational infrastructure that facilitate political activism subsequently evolve in this manner. Religious pro-social cooperators lower the monitoring and sanctioning necessary to elicit broader contributions to collective goods, making religion an efficient social mobilizer.

#### *Alternative Explanations*

At the same time, a variety of alternative explanations also potentially explain the relationship between religion and political activism. Ideological explanations suggest that religious belief and commitment drive individual behavior. Subsequently, variation and change in theological commitments are argued to explain variation in political activism. Theories of religious competition suggest that the introduction of religious competitors forces religious elites to become more attuned to the social needs of their laity. Accordingly, religious elites are compelled to provide the institutional resources that enable political activism by laity.

Variation in historical relations between the church and state are also posited to impact political activism. Where such histories are marked by conflict, religious institutions are thought to have less political space to enable political engagement. Economic deprivation might potentially compel individuals to organize for political change. Finally, a predominant line of literature in political science suggests that ethnically heterogeneous communities have distinct disadvantages in providing public goods such as political activism.

### *Findings and Implications*

Mexico offers an attractive venue to test these theories. There is a great deal of variation in the manner in which the Catholic Church governs itself across its administrative dioceses. It is a young democracy with variation in the effectiveness of political party competition. Mexico's unique church/state history has meant that some regions may have been potentially limited in their ability to prompt political activism, while other areas at the periphery might have potentially had much more space. In short, Mexico displays substantial sub-national variation in measures of theoretical interest to this study. Furthermore, because of its relatively advanced economic status, a great deal of statistical analysis is available to facilitate quantitative analysis.

To test these theories statistically, I made use of over 13,000 Mexican citizens surveyed in 2001, 2003, and 2005. My qualitative investigation involved a controlled comparison of political activism by indigenous communities in Chiapas, a region that has seen high levels of political activism, and Yucatán, a region that has seen low levels of political activism. To ensure that nothing particular to indigenous or ethnic relationships

drove the results of my qualitative comparison, this study also examined a shadow-case of political activism in Morelos.

### *Religious Decentralization*

This study finds strong evidence in support of the proposition that religious decentralization positively affects political activism by the laity. In the statistical analysis presented in Chapter 4, a general and positive association was found between my measure of religious decentralization (the number of permanent deacons in each Catholic diocese) and protest. The association held whether religious decentralization was measured continuously, dichotomously, or categorically, as well as over the dichotomous, count, and political measures of protest. It should be noted that religious decentralization was also the only explanatory variable of the tested theoretical propositions that accounted for variation in the count measure of protest. The results for the relationship between religious decentralization and political association were supportive, though weaker than for protest. As also expected, religious decentralization had little ability to explain variation in voting behavior.

The qualitative analysis supported the hypothesized mechanisms linking religious decentralization to political activism. Within Chiapas, decision-making was granted through democratic structures built into the diocese. Opportunities to participate in the religious institution were provided by revisions to the liturgy that made the religion more accessible to indigenous communities. Most importantly, it provided locally and democratically selected catechists and deacons the liberty to choose themes for

discussion. This liberty translated into a forum wherein individuals could express their local problems and develop solutions and strategies to deal with them.

Monitoring and sanctioning were provided by productive cooperatives created throughout the region by the Catholic Church. These cooperatives had the capacity to monitor the contributions of members through production quotas and other similar means. Non-contributors were sanctioned by exclusion from the benefits of cooperative group membership. The cooperatives' profits were distributed according to an individual's level of production, and non-contributors were excluded from a variety of services. As the material benefits provided by these cooperatives grew, so did group membership. As these cooperatives expanded, they enabled reciprocal exchange both within and between communities.

Chiapas demonstrated the importance of religiously committed pro-social cooperators as well. Following religious decentralization, sustained cooperation in the production of material religious club goods lagged as the legacy of centralized governance initially inhibited participation. Religiously committed pastoral workers such as catechists and deacons made critical initial contributions to these religious club goods that provided initial group benefits and slowly enticed others into joining.

The subsequent organizational base that developed directly produced politicized groups including organizations such as *Tierra y Libertad*, the Union of Unions, and eventually the Zapatistas. Some avenues of political activism were undesired and unanticipated by the Church clergy, and the Church hierarchy broke its ties with groups advocating armed violence throughout the state.



Conversely, the absence of decentralized monitoring, sanctioning, and decision-making authority in the Archdiocese of Yucatán meant that the laity never developed a forum through the religious institution to develop autonomous solutions to local problems. The general lack of monitoring and sanctioning opportunities within the Archdiocese meant that the religious institution never became a vehicle supporting reciprocal interactions or an organizational base. Subsequently, Yucatán is characterized by few reciprocal bonds of interaction between communities. There are few independent organizations, and subsequently there is little political activism by indigenous communities across the state.

Morelos provides support for the theory in a non-indigenous setting. As in Chiapas, the Diocese of Cuernavaca decentralized monitoring, sanctioning, and decision-making authority to laity. Decision-making was provided within Christian base communities where small groups of local laity were encouraged to read the Bible on their own and reflect on its meaning amongst themselves. Initially, these groups were not political. Instead, they were comprised of highly religious laity who once again took the critical first steps in contributing to club goods. These groups gradually began to focus on local problems. As in Chiapas, monitoring and sanctioning was provided through cooperatives embedded in Christian base communities. These cooperatives generated reciprocal exchange and an organizational base that directly contributed to the worker, teacher, and peasant political movements in Morelos that emerged during the 1970s and 1980s. The CEBs continue to support a variety of causes to this day, despite the

subsequent recentralization of the diocese by Sergio Méndez Arceo's conservative successors.

### *Ideology*

The statistical analysis presented in Chapter 4 provided supportive evidence that ideological factors contribute to political activism across Mexico. Dioceses with bishops who were not appointed by the Vatican's conservative envoy to Mexico from 1978 to 1997 were associated with increased odds that individuals engaged in political activism. These bishops are expected to have been more receptive to progressive strands of Catholic theology.

At the same time, the qualitative investigation demonstrated that exposure to progressive Catholicism is not sufficient to prompt political activism. On the one hand, ideology was an important factor in Chiapas. Bishop Samuel Ruiz had been influenced by both his participation in the Second Vatican Council and liberation theology throughout the 1960s. These ideas informed his work as he supported movements for social justice across his Diocese. Still, Yucatán also implemented many of the reforms recommended by the Second Vatican Council following the appointment of Bishop Emilio Carlos Berlie Belaunzarán in 1995. These included the development of pastoral councils and initiatives such as workshops for democracy. However, because the Archdiocese did not also decentralize decision-making, monitoring, and sanctioning authority to the laity, it has not been a force to prompt political activism. Indeed, as noted throughout the case studies, clergy inspired by liberation theology often failed to prompt political activism by

their parishioners, despite their desire to do so. In many of these cases, this is because they had not adequately decentralized religious authority.

### *Religious Competition*

Overall, only limited support is given to theories of religious competition by this study. Within the statistical analysis, the effective number of religions index used to capture the level of religious competition in each municipality has weak to insignificant relationships with many of the protest variables, although it does appear to be strongly associated with political association.

Moreover, religious competition does little to explain variation in indigenous political activism between the Mexican states of Chiapas and Yucatán. Religious competition from Protestant denominations was present in both Chiapas and Yucatán. While Chiapas has experienced the highest levels of Protestant competition in Mexico since the 1970s, Yucatán also ranks highly among Mexican states in terms of religious competition. While the argument could be made that Protestant competition prompted the religious hierarchy to offer material incentives to their parishioners and speak out on behalf of the political and social concerns of the poor in Chiapas, religious competition prompted no such behavior in Yucatán.

The argument could also be made that Yucatán experienced Protestant competition from Pentecostal groups that emphasized spiritual rewards, while Chiapas experienced Protestant competition from mainline Protestant groups that emphasized material rewards for their adherents. As a consequence, the Catholic Church mimicked Pentecostal liturgical practices in Yucatán, and the hierarchy had not been forced to

advocate for material and social rewards as it had in Chiapas. I found little evidence, however, to substantiate the claim that Pentecostals were a significantly stronger presence among Catholic religious competitors than they were in Chiapas. I also found little evidence that the Catholic Church in Yucatán had adopted a broad strategy of mimicking Pentecostal practices within the liturgy.

While religious competition almost certainly forces the hands of formerly complacent religious elites to better serve their parishioners, clergy have a variety of options available to do so. Religious elites need not necessarily support political or social causes. While this was the case in Chiapas, Protestant competition in Yucatán prompted the Church hierarchy to embrace popular forms of devotion and increase its outreach to rural communities. This variation in potential responses likely explains why religious competition is a relatively weak predictor of political activism in this study.

#### *Relative Deprivation/Economic Factors*

The statistical analysis strongly supports the contention that economic deprivation is linked to higher levels of political activism. Higher levels of municipal economic development, as measured through the Human Development Index at the municipal level, are consistently linked to decreased engagement in protest and associational activities. The only model for which relative deprivation did not elicit a statistically significant relationship was the count protest variable.

At the same time, my qualitative investigation demonstrated that both Chiapas and Yucatán have experienced conditions that would presumably impart economic hardship to broad sectors of the population. The mountainous and largely indigenous

regions of Chiapas have benefitted from few public services, few economic opportunities, and were heavily impacted by Mexico's economic crises throughout the 1980s and 1990s. At the same time, Yucatán is also marked by pervasive rural poverty amongst its primarily indigenous populations. Few public goods reach the small towns in the interior of the peninsula, and one of the predominant modes of economic sustenance (henequen production) was completely dismantled by the PRI state throughout the 1980s and 1990s.

Though the both experienced economic hardship, political activism only emerged in Chiapas. Economic hardship is almost certainly an important precondition to demand for political change. However, it is not sufficient to develop it. As the analysis between Yucatán and Chiapas demonstrate, without the conditions encouraging the development of an organizational framework, broad activist movements are unlikely to emerge.

#### *Political Party Competition*

The results of this study lend no support to theories suggesting that areas marked by heightened levels of political party competition should experience higher levels of political activism. Within my statistical analyses, a Herfindahl index measuring the proportion of votes received by each party at the municipal level for the proportionally represented seats in the Mexican federal lower legislative chamber had little impact on the odds individuals participated in protest or associational activity.

Again, qualitative analysis helps us to understand why such a relationship fails to emerge. Given theoretical expectations by much of the literature that political party competition opens up space for collective action, the reason why the statistical analysis demonstrates no relationship presents a mystery. It is only with the in-depth qualitative

examination of political party competition in Chiapas and Yucatán that we see that competition between the PAN and the PRI political parties might have decreased incentives for individuals to engage in political activism. Within both states, political party competition was intense. The PRI often marshaled clientelistic benefits for its supporters in heavily contested municipalities. At the same time, it was known to withhold social services from individuals and communities known to support opposition parties. As noted in Chapter 6, several of my interview respondents in Yucatán alleged that the PAN political party, upon attaining power, also adopted similar practices.

Such measures increase the costs associated with political activism and accordingly have a dampening effect on its occurrence. While political party competition likely offers increased pathways for participation in some settings, it inhibits them in others, explaining why political party competition exhibits little explanatory power in the statistical analysis. It is important to note that while political party competition increased the costs of political activity in both states, it did not inhibit it in Chiapas. Political party competition accordingly does little to explain variation in political activism between Chiapas and Yucatán.

#### *Ethnic Heterogeneity*

Furthermore, this dissertation provides little support for theories suggesting that ethnic fractionalization is negatively associated with the provision of public goods. A Herfindahl index of the proportion of individuals speaking various languages within each municipality consistently failed to explain either political protest or political associational activity in any of the statistical models.

Yucatán's indigenous population overwhelmingly speaks a single indigenous dialect. Chiapas, on the other hand, is marked by a great deal of ethnic fractionalization. Several different dialects are spoken throughout the region. If similar ethnic characteristics facilitate monitoring and sanctioning, the ethnically homogenous indigenous groups of Yucatán would presumably hold substantial advantages in producing public goods over indigenous groups in Chiapas. However, the public good of political activism has not emerged in Yucatán. It is Chiapas, marked by a great deal of ethnic fractionalization, that has experienced political mobilization. The argument might be made that ethnic identity has been activated in Chiapas but not in Yucatán, but this argument is unconvincing. Yucatán's indigenous populations are marked by a language and customs that are substantially differentiated from *mestizo* society. Furthermore, the political movements that emerged in Chiapas did not originally coalesce around of ethnic identity. Instead, they focused on socioeconomic concerns.

#### *Church/State Histories*

There is also little evidence in this analysis supporting the contention that histories of conflict between the Mexican state and the Catholic Church determine the space available for religion to prompt political activism. Within the context of the statistical analysis, my measure of the number of combatants in the Cristero War by state generally exhibits no statistically significant relationship with the odds individuals engage in political activism.

Within the qualitative analysis, both Yucatán and Chiapas developed at the periphery of Mexican politics during the Mexican church/state conflicts of the 19<sup>th</sup> and

early 20<sup>th</sup> centuries. Their respective Churches were relatively unencumbered by the legacy of these conflicts to speak out politically. Beyond federal constitutional limits to the clergy's participation in political affairs, the institutional Church does not experience repression from the state in either Chiapas or Yucatán. In fact, both are characterized by collaboration between religious and civil authorities, particularly in the case of Yucatán. However, only in Chiapas has the Church taken advantage of this space to speak out and enable political activism by laity.

#### *Implications and Suggestions for Future Investigation*

A major implication of this study is that, under specific conditions, religion has the potential to be a powerful social mobilizer. Religion is among the most ubiquitous of all human institutions. They play a powerful role in structuring local interactions across much of the world. Accordingly, the dissertation points to promising avenues to help understand political activism in developing countries. To the extent that religious leaders decentralize religious authority to laity, they can prompt collective action.

Decentralization, however, comes with a cost. As seen throughout this study, the political mobilization of the laity can move in directions that are unanticipated and undesired by clergy once unleashed. Accordingly, clergy face the risk that they will lose control of the religion's role in secular affairs. Such fears prompted the Catholic hierarchy's retreat from the "popular church" in the late 1970s when the Vatican sought to reinstitute centralized control (Levine 1988, 254; Kalyvas 1996).

As also demonstrated through the qualitative case studies, the very nature of local decision-making, monitoring, and sanctioning means that local groups set their own



agenda for action. Such decentralization may make it difficult for religious institutions or political groups born from religious decentralization to coordinate and commit to effective activist initiatives if local groups have developed widely different political agendas (Kalyvas 2000; Warner 2000). While this study has suggested that religious decentralization has a positive impact on political activism broadly, additional research is required to determine when such activism is likely to be coordinated effectively.

Furthermore, this study has drawn from empirical literature in behavioral economics and psychology suggesting that some individuals are marked by pro-social preferences. Religion often helps to prompt such pro-social behavior. The present study has assessed this pro-social impact in an exogenous manner. Determining the conditions under which religious institutions become more or less likely to exert this influence is beyond the scope conditions of the study. Future research must examine when religious institutions are more or less likely to prompt pro-social behavior from their adherents. The study of cultural differences and pro-sociality by Henrich and his collaborators (2001) suggested that there were substantial differences across cultures regarding propensities toward pro-sociality. Understanding the conditions under which religion is likely to influence such pro-social behavior is likely an important step toward understanding such cultural variation.

Additionally, one of the broadest implications of this research is that theories of political mobilization need to adequately account for the agency of the individuals who mobilize politically at the grassroots and pay the costs associated with political activism. As has been discussed, some theories suggest religious competition prompts religious

leaders to support political causes, naturally prompting political activism by laity. Other theories argue that where church/state histories provide appropriate space, religious elites can support political causes and naturally prompt political activism by laity. Where liberation theology came to be supported by the Church hierarchy, the laity naturally came to embrace political activism. The assumption made by all of these theories is that lay political activism is a simple by-product of the decision of religious elites to provide the appropriate institutional resources and ideological frames that prompt collective action.

This study, however, has demonstrated the difficulty these theories encounter in explaining spatial patterns of political activism. They have not been sufficiently oriented toward explaining the micro-level incentives of the individuals themselves who must pay the costs associated with political activism. The theory elaborated by this dissertation has offered a corrective avenue for future research. My theory of religious decentralization specifies how religious institutional structures influence individual costs and benefits associated with political activism, and my analysis demonstrates that such micro-level theorizing explains variation in political activism better than alternative theories.

A fourth important implication impacts the extensive literature on ethnicity and the provision of public goods. Unlike the literature just discussed, much of this work has invested substantial effort into identifying the micro-level mechanisms linking ethnic characteristics to public goods outcomes. As others have observed, this literature has paid insufficient attention to the religious institutions that often coincide with ethnic distinctions, structure individual interactions at a local level, and provide the critical

organizational base enabling ethnic collective action (Kurien 2001; Jones-Correa and Leal 2001; Ruane and Todd 2011, 69). Disentangling the separate influences of ethnicity and religious institutions (Stewart 2009; Ruane and Todd 2011) can provide greater insight into how ethnicity influences the provision of public goods.

A major implication of this dissertation is that agent-based modeling has promise to examine the evolution of organizational development and to unify ideological and incentive-based theories of political behavior. Agent-based modeling allows for assessing the co-evolution of religious club goods and the development of generalized reciprocity facilitated by religious decentralization. Such processes are important to understanding how localities build the organizational infrastructure necessary to facilitate public goods (Ostrom 2007).

My work also takes a first step in utilizing agent-based modeling to synthesize the differing theological and institutional incentives religions create to mobilize laity. It illustrates the potential of computation to bridge the gap between perspectives explaining political outcomes as either the result of ideological influences on one hand or material and institutional incentives on the other. Unlike conventional formal models, agent-based simulations can model heterogeneous actors with differing utility functions in a relatively simple manner. It provides a promising opportunity to simultaneously model actors motivated by both altruistic and material considerations and to push forward research examining how the mutually reinforcing interaction between ideas and incentives influences political outcomes.

Finally, the global "third wave of democratization" involved nations whose citizenry generally score high on levels of individual religiosity, yet whose citizens also generally score low on levels of political engagement. A more precise understanding of how and when organized religion plays a role in political mobilization can help us better gauge the prospects of citizen participation in these countries. This dissertation suggests that these prospects are much higher when these countries are characterized by religious institutions that have granted their laity local control.

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- 2, Cooperative member. 8/2/2012: Comitán, Chiapas.
- 3, Charitable Organization. 11/9/2011: San Cristóbal de las Casas, Chiapas.
- 4, Church Volunteer. 12/2/2011: Bachajón, Chiapas.
- 5, Government Official. 11/11/2011: San Cristóbal de las Casas, Chiapas.
- 6, Civic Association. 8/27/2012: Cuernavaca, Morelos.
- 7, Civic Association. 8/29/2012: Cuernavaca, Morelos.
- 8, Government Official. 10/27/2011: Mérida, Yucatán.
- 9, Government Official. 10/28/2011: Chichimilá, Yucatán.
- 10, Citizen. 10/28/2011. Tizimín, Yucatán. Chichimilá, Yucatán.
- 11, Church Official. 6/14/2012: Valladolid, Yucatán.
- 12, Church Volunteer. 6/29/2012: Tinum, Yucatán.
- 13, Citizen. 6/29/2012: Tinum, Yucatán.
- 14, Civic Association. 8/24/2012: Cuernavaca, Morelos.
- 15, Civic Association. 8/23/2012: Cuernavaca, Morelos.
- 16, Cooperative Member. 8/9/2012: Tuxtla Gutiérrez, Chiapas
- 17, Cooperative member. 7/25/2012: Comitán, Chiapas.
- 19, Government Official. 11/22/2011: San Cristóbal de las Casas, Chiapas.
- 20, Party Official. 10/21/2011: Valladolid, Yucatán.
- 21, Citizen. 6/25/2012: Valladolid, Yucatán.
- 22, Church Official. 6/28/2012: Valladolid, Yucatán.
- 23, Church Official. 6/18/2012: Valladolid, Yucatán.
- 24, Protestant Minister. 7/9/2012: Valladolid, Yucatán.

- 25, Party Official. 10/24/2011: Tizimín, Yucatán.
- 26, Citizen. 10/13/2011: Tizimín, Yucatán.
- 27, Citizen. 10/29/2011: Tinum, Yucatán.
- 28, Civic Association. 11/28/2011: Comitán, Chiapas.
- 29, Civic Association. 11/17/2011: San Cristóbal de las Casas, Chiapas.
- 30, Cooperative member. 7/23/2012: San Cristóbal de las Casas, Chiapas.
- 31, Church Representative. 12/1/2011: Bachajón, Chiapas.
- 32, Civic Association. 11/29/2011: San Cristóbal de las Casas, Chiapas.
- 34, Civic Association. 8/20/2011: Cuernavaca, Morelos.
- 35, Civic Association. 8/27/2012: Cuernavaca, Morelos.
- 36, Civic Leader. 10/23/2011: Tizimín, Yucatán.
- 37, Civic Leader. 10/12/2011: Tizimín, Yucatán.
- 38, Civic Leader. 10/12/2011: Tizimín, Yucatán.
- 39, Church Volunteer. 6/21/2012: Valladolid, Yucatán.
- 41, Citizen. 6/29/2012: Tinum, Yucatán.
- 42, Government Official. 11/15/2011: San Cristóbal de las Casas, Chiapas.
- 43, Cooperative member. 7/31/2012: San Cristóbal de las Casas, Chiapas.
- 45, Church Official. 7/12/2012: Comitán, Chiapas.
- 46, Church Official. 12/1/2011: Bachajón, Chiapas.
- 47, Civic Association. 8/27/2012: Cuernavaca, Morelos.
- 48, Civic Leader. 10/11/2011: Tizimín, Yucatán.
- 49, Government Official. 10/6/2011: Tizimín, Yucatán.
- 50, Citizen. 7/9/2012: Valladolid, Yucatán.
- 51, Church Official. 10/3/2011. Tizimín, Yucatán.

- 52, Party Official. 10/10/2011: Tizimín, Yucatán.
- 56, Church Official. 11/24/2011 & 11/27/2011: San Cristóbal de las Casas, Chiapas.
- 57, Civic Association. 11/15/2011: San Cristóbal de las Casas, Chiapas.
- 58, Civic Association. 8/27/2012: Cuernavaca, Morelos.
- 59, Civic Association. 8/27/2012: Cuernavaca, Morelos.
- 60, Civic Association. 8/21/2012: Cuernavaca, Morelos.
- 61, Citizen. 8/16/2012: Cuernavaca, Morelos.
- 63, Church Official. 10/7/2011: Tizimín, Yucatán.
- 67, Church Volunteer. 10/12/2011: Tizimín, Yucatán.
- 69, Church Official. 10/26/2011: Mérida, Yucatán.
- 70, Citizen. 10/29/2011: Tizimín, Yucatán.
- 71, Citizen. 9/23/2012: Mérida, Yucatán.
- 81, Church Official. 11/4/2011: San Cristóbal de las Casas, Chiapas.
- 83, Cooperative member. 7/25/2012: Comitán, Chiapas.

APPENDIX A  
AGENT-BASED MODEL TECHNICAL ATTRIBUTES

### *A.1 Model Initialization*

As the model initializes (before any interactions between actors take place), there are a user-specified number of agents with their own unique individual traits. These traits include: 1) whether or not agents are members of the religious in-group; 2) agents' generalized anticipated reciprocity; 3) agents' reputations; 4) the sum of agents' Prisoner's Dilemma payoffs resulting from their own unique history of interactions with others; 5) perceptions of the reputation generally of individuals in the religious in-group and individuals in the religious out-group; and 6) whether or not agents are ideological cooperators.

The model is also characterized by structural characteristics that impact each actor. These global constraints include: 1) a typical payoff structure of Prisoner's Dilemma interactions, including an option for agents to simply withdraw rather than interact. Because we are dealing in the realm of club and political public goods, individuals who are not drawn in the interaction also receive a net benefit if at least one of the members cooperates - they receive the benefits of the contributions of members without having paid a cost themselves. 2) The environment also consists of the decentralization of the religious in-group. Higher decentralization implies intensified levels of monitoring and sanctioning of the behavior of in-group members. Lower levels of decentralization imply lower levels of monitoring and sanctioning of the behavior of members.

## A.2 *Initial Parameterizations*

An important parameter condition is the anticipated reciprocity and reputation boundary. The logit equation used to calculate whether or not agents will interact with one another based on anticipated reciprocity and reputation is sensitive to this threshold, and a boundary range from  $-0.5$  to  $0.5$  is chosen. This value allows for variability in anticipated reciprocity and reputation values without over-determining whether agents will withdraw or interact. Steepness ascertains the degree of sensitivity agents have to differences between their own levels of anticipated reciprocity and the other agents' reputation. It also ascertains the degree of sensitivity agents have in calculations to defect or cooperate. This is set to 2 in the baseline model. The higher the level of steepness, the less likely agents will interact or cooperate if the difference between interaction or utility estimates is large.

Pro-social cooperators are set at a baseline of 10%. This is to say that 10% of the religious group members will never defect in interactions that they agree to enter into. As implemented in the model, the total number of pro-social cooperators have the potential to grow or decrease according to the evolutionary procedure of the model.

The size of the religious group is initialized at 50% of the population, which is enough to be a large, mainstream religion without being monopolistic. The frequency of the public goods games is set to 20%. The expectation is that individuals more regularly interact in the production of religious club goods than in the production of public goods. The learning rate is set at a value of 0.05 to allow for interval growth or diminishment of anticipated reciprocity and reputation levels. With regard to the evolutionary parameters,

the evolutionary replacement rate is set so that 10% of the population is replaced every generation, while there are 500 interactions per generation. The mutation rate is set to 0.2. All evolutionary parameters are set to allow fluctuation in the model without overcoming it with random noise. The model initializes with 100 individuals and each run is allowed to proceed to 15,000 time-steps. 15,000 time-steps is sufficient time to allow predominant patterns of the production of public goods to emerge.

### A.3 *Payoffs*

The environment for the model consists of the payoff two randomly drawn players receive for mutual cooperation (MC), the sucker payoff, which is cooperating while the other agent defects (SP), the temptation to defect, which is defecting when the other agent cooperates (TD), mutual defection (MD), and simply withdrawing from participation in the game (W).

The payoffs correspond with the standard prisoner's dilemma, with a slight modification as the model is working within the realm of club and public goods.  $TD > MC > W > MD > SP$ , and  $2MC > TD + SP$ .

$MC = 1$ , and all individuals in the relevant group (the in-group for club good interactions, the total population for public good interactions) who were not drawn (non-participants) receive a score of 2 because they receive the benefits of the club or public good without paying a cost in its production.  $SP = -2$ , and non-participants receive a score of 2.  $TD = 2$ , and non-participants receive a score of 2.  $MD = -1$ ,  $W = 0$ . In MD and W interactions, non-participants receive a score of 0 as no public or club goods were produced.

#### A.4 *Interact or Withdraw?*

The discrete choices based on the two separate probabilities of Individual B's reputation (BREP) and the generalized anticipated reciprocity of Individual A (ARECIP) are reconciled through the following logit function determining the probability Individual A will be willing to interact with Individual B ( $Pr[AInt]$ ), with  $\gamma$  representing Agent A's sensitivity to differences between the two estimates:

$$Pr[AInt] = e^{(\gamma * ARECIP)} / (e^{(\gamma * ARECIP)} + e^{(\gamma * -BREP)})$$

Individual B engages in identical calculations with regard to his/her own generalized anticipated reciprocity and the reputation of Individual B.

#### A.5 *Strategy*

If both players decide to enter into a strategic interaction, Individual A estimates separate expected utilities for cooperation ( $E[U(C)]$ ) and defection ( $E[U(D)]$ ). The expected utility for cooperation is based on the likelihood of receiving the payoff from mutual cooperation (MC =1) balanced by the likelihood of receiving the sucker payoff (SP = -2). The probability Individual A will interact with Individual B ( $Pr[AInt]$ ) is also Individual A's expected probability Individual B will cooperate.

The expected utility of cooperation is modeled by the equation:

$$E[U(C)] = Pr[AInt]MC + (1-Pr[AInt])SP$$

The expected utility of defection includes both immediate and long-term considerations. The immediate gains from defection are estimated based on the likelihood of receiving the payoff from the temptation to defect (TD=2) balanced by the likelihood of receiving the payoff of mutual defection (MD=-1).



The long-term costs of defection include the probability that defection will be monitored. If Individual A's defection is monitored, he/she will be excluded from the potential future benefits provided by the group for an exclusionary period of sanctioned rounds. The probability of the interaction being monitored is represented by the level of monitoring (*MON*) (this parameter value is between 0 and 1).

In order to calculate the likely cost of being excluded from the benefits of group membership, Individual A examines the past performance of the provision of group benefits of the religious in-group by summing score increases resulting from the cooperative interactions of group members over the rounds the agent stands to potentially be sanctioned for (*s*). The expected utility of defecting is accordingly modeled by the equation:

$$E[U(D)] = Pr[Aint]TD + (1-Pr[Aint])MD - MON(s)$$

The discrete choice based on the two separate calculations of Individual A's expected utilities from cooperating and defecting is reconciled through the following logit function to develop the probability Individual A will cooperate (*Pr[ACoop]*):

$$Pr[ACoop] = e^{(\gamma * E[U(C)])} / (e^{(\gamma * E[U(C)])} + e^{(\gamma * E[U(D)])})$$

Individual B engages in similar calculations of expected utility. Theological cooperators cooperate unconditionally, but still make a calculation concerning whether they will interact.

#### A.6 *Updated Attributes*

After interacting, each agent's score (according to the payoff structure) anticipated reciprocity, and reputation (if the interaction was monitored by the religious in-group) is adjusted.

If Individual A cooperated, he/she receives an increase in reputation of  $\lambda$  (the learning rate) if the interaction was monitored. Conversely, if Individual A defected, he/she receives a deduction in his/her reputation score of  $\lambda$ . If Individual B cooperated with Individual A, Individual A's level of generalized anticipated reciprocity increases by  $\lambda$ , while it decreases by  $\lambda$  if Individual B defects. Individual B receives a similar update in his/her attributes.

If the interaction was monitored by the group and defection occurs, the defecting member is noted and any member of the religious in-group will automatically withdraw from any interaction with the defector for the next  $s$  rounds. The sanctioned defector also does not receive the non-participator +2 benefit to his/her score from cooperative actions of other group members during the period of sanction. If the interaction was not monitored, reputation scores are not updated, although anticipated reciprocity scores are. If either player decides to withdraw, no update to either's score, reputation, or anticipated reciprocity occurs.

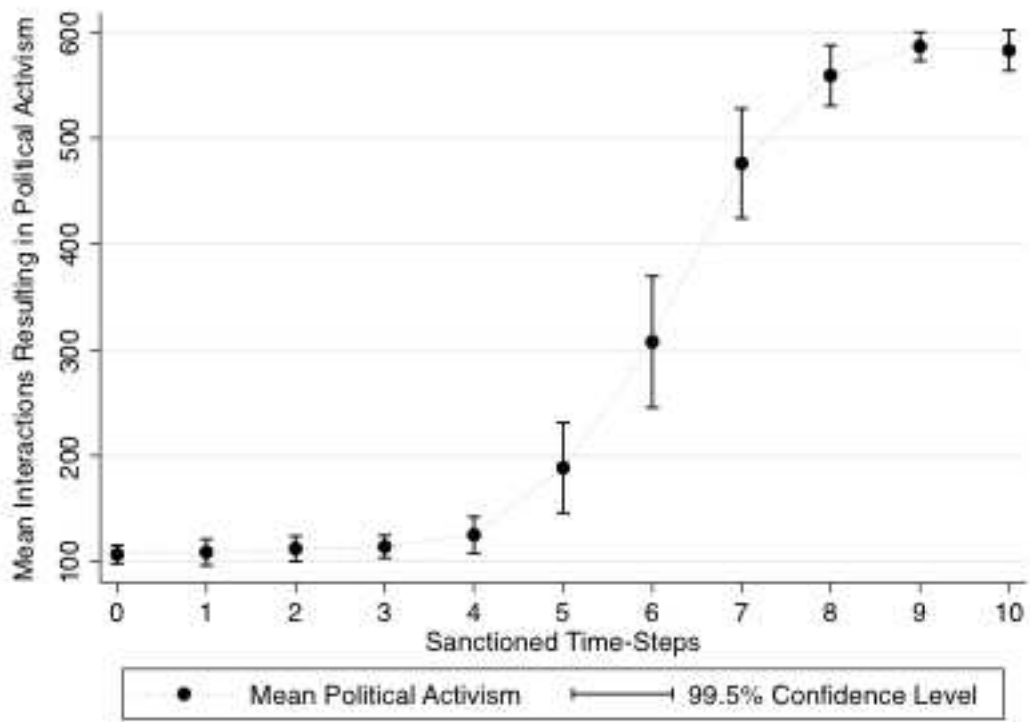
#### A.7 *Evolution and Mutation*

In addition to adapting their behavior based on their own personal experiences, agents also have the capability to see the relative payoffs of other individuals and adjust their own behavior in an attempt to better their own payoffs.

After each generation, a percentage of the population produces offspring who adapt their own anticipated reciprocity and reputation values to be more competitive in the model. After a certain number of user-specified interactions (one generation), a new generation is created with agents adapting traits and strategies that are more likely to give them higher overall payoffs. After each generation, a user-defined percentage of agents are selected (Agent A). Each of these agents randomly selects two other agents (Agent B and Agent C). The overall payoffs an agent has received as a result of his/her various interactions are represented by the agents' score. Each Agent A compares the scores of his/her unique Agent B and Agent C. If agent B has the higher score, Agent A's anticipated reciprocity, reputation, and whether or not he/she is an ideological cooperator are replaced by the characteristics of Agent B. If Agent C has the higher score, Agent A's anticipated reciprocity, reputation, and whether or not he/she is an ideological cooperator are replaced by Agent C. If Agents C and B have identical scores, Agent A randomly decides which of the two agents' traits will be adopted. The anticipated reciprocity and reputation scores are mutated separately by adding them to the user-defined mutation rate multiplied by a random number from a normal distribution with mean 0 and standard deviation 1.

APPENDIX B  
SANCTIONING AGENT-BASED MODEL

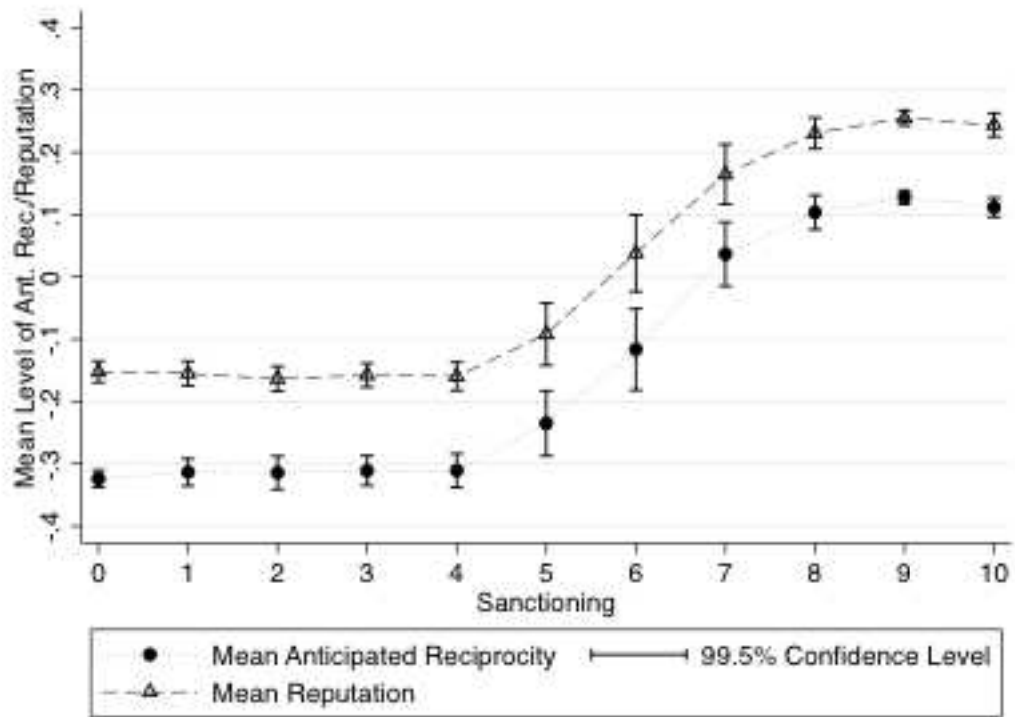
Monitoring is held constant at an intermediate value of 0.5 while sanctioning is allowed to vary from a value of 0, which represents a situation with no sanctioning, to 10, which, depending on the value of the club goods being produced by the religious institution, is potentially intense sanctioning. These sanctioning values are increased by intervals of 1.0. All other parameter values are held constant across experiment runs in both sets of experiments. Each model run contains 15,000 individual time-steps (individual interactions). Each specific experimental parameter is given 100 individual runs for a total of 1,100 runs for the monitoring parameter and another 1,100 runs for the sanctioning parameter.



Appendix Figure 1. Sanctioning and Political Activism

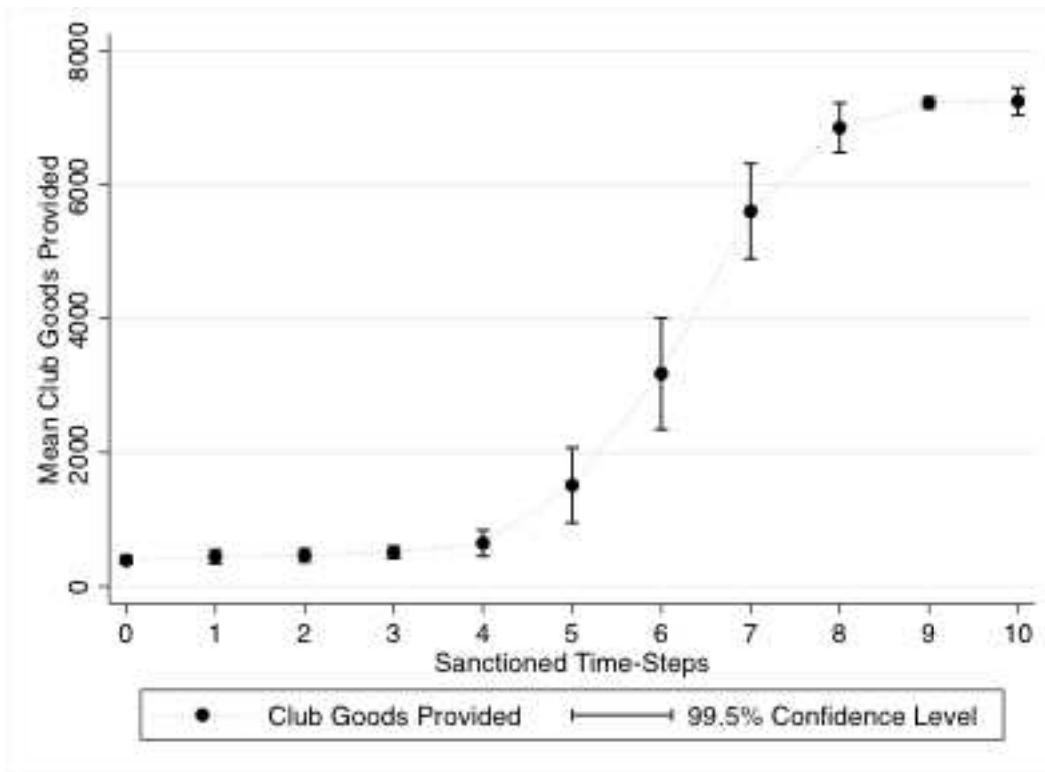
Appendix Figure 1 demonstrates the relationship between sanctioning and the provision of political activism. When sanctioning is set to 0, a mean of 107 interactions resulting in political activism are created. There is no statistically significant difference between sanctioning values of 0, 1, 2 or 3. A sanctioning value of 4 is statistically different at  $p < .01$  with an average of 125 interactions resulting in political activism, while a sanctioning value of 5 is statistically different from the mean of sanctioning at 0 at  $p < 0.001$  with an average value of 189 interactions resulting in political activism produced per model run. When sanctioning is equal to 8, 559 interactions resulting in political activism are produced on average. Again, there are decreasing returns, and this increase tapers off when sanctioning equals 10. It should be noted that the pattern of dispersion at intermediate values exists for sanctioning as well. The political activism produced across model runs from sanctioning is set to 5, 6, 7, and 8 have relatively high standard deviations.

Unsurprisingly, we see with Appendix Figure 2 that sanctioning has a similar effect on the levels of anticipated reciprocity and reputation as it does on the provision of political activism. With sanctioning, we see an S-shaped relationship where low levels of sanctioning result in low levels of anticipated reciprocity and reputation, rapidly increasing beginning at about 5 time steps and beginning to level off at 8 to 10 time-steps.



Appendix Figure 2: Sanctioning, Anticipated Reciprocity, & Reputation

Figure 3 examines the relationship between decentralization and the provision of club goods. We see a relationship between the decentralization and the provision of club goods that is similar to the relationship between decentralization and the provision of political activism.



Appendix Figure 3: Sanctioning and Club Goods Provision



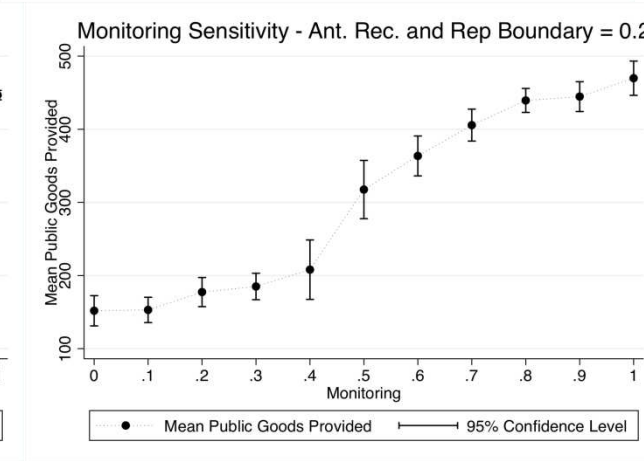
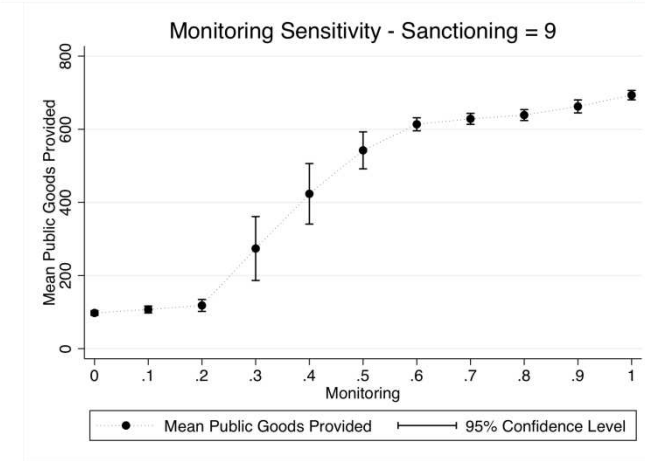
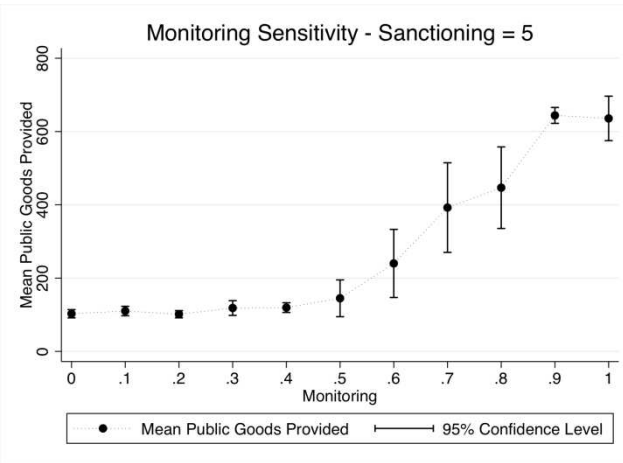
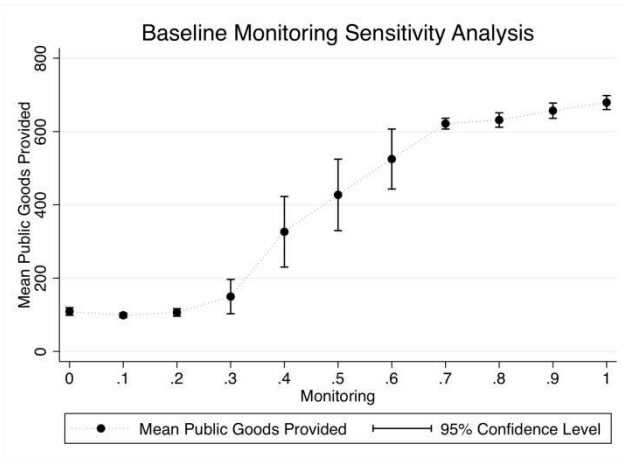
APPENDIX C  
AGENT-BASED MODEL SENSITIVITY ANALYSIS

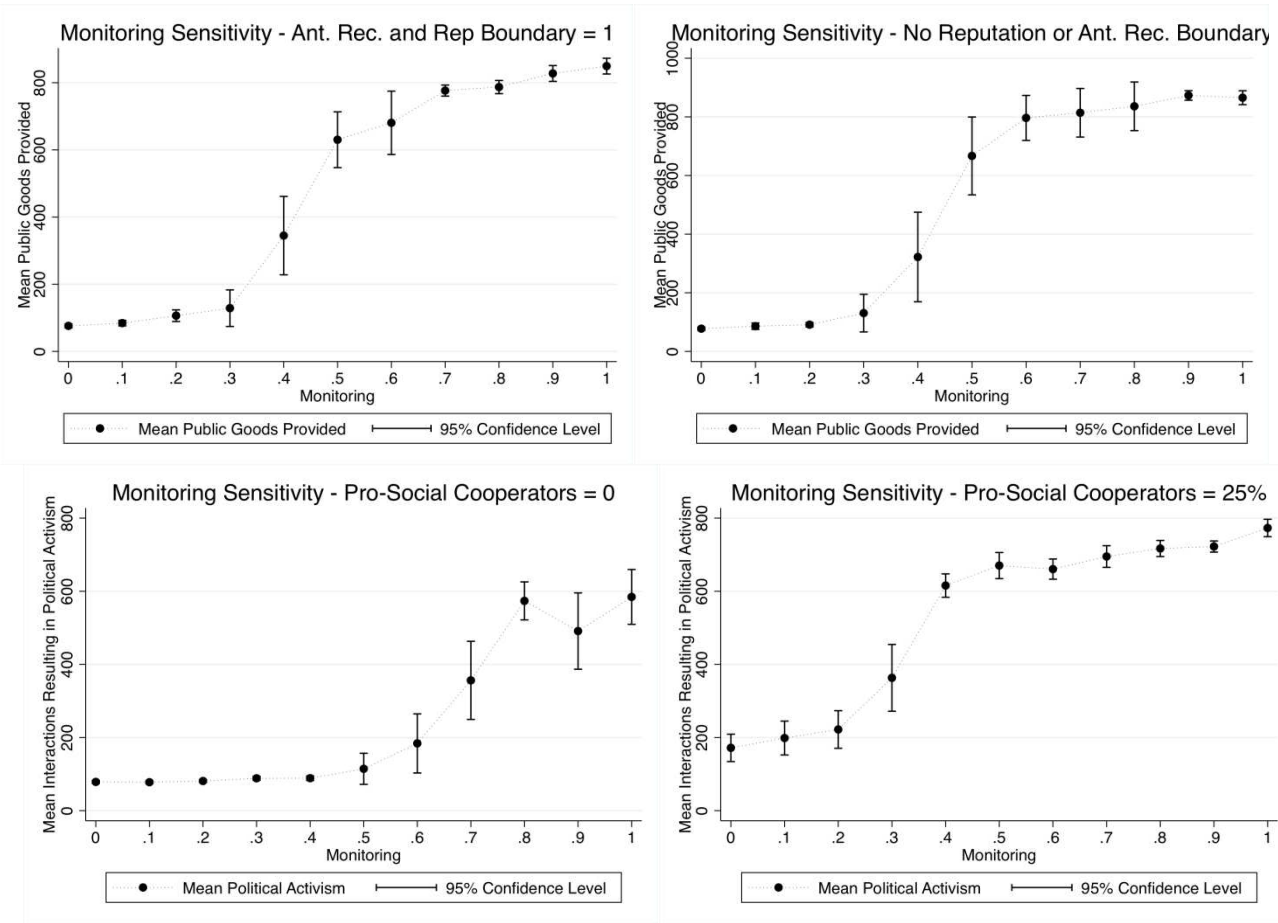
Appendix Figure 4 presents the results of the sensitivity analysis for both monitoring and sanctioning. Each parameter is varied while holding all others constant at the baseline value for 20 model runs. While varying the initial parameters has an impact on the total number of public goods provided, as well as the dispersion of the number of public goods provided across the various models, the general relationship found between monitoring, sanctioning, and the provision of public goods found in this paper holds across model runs. This is to say that at low levels of monitoring and sanctioning, we see relatively low provision of public goods, while at high levels of monitoring and sanctioning, we see a statistically significant increased capacity for the production of public goods at the 95% confidence level. At intermediate levels, we see a greater deal of dispersion across model runs.

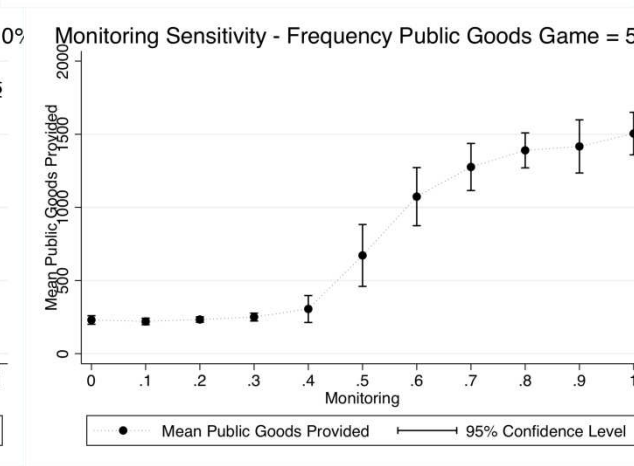
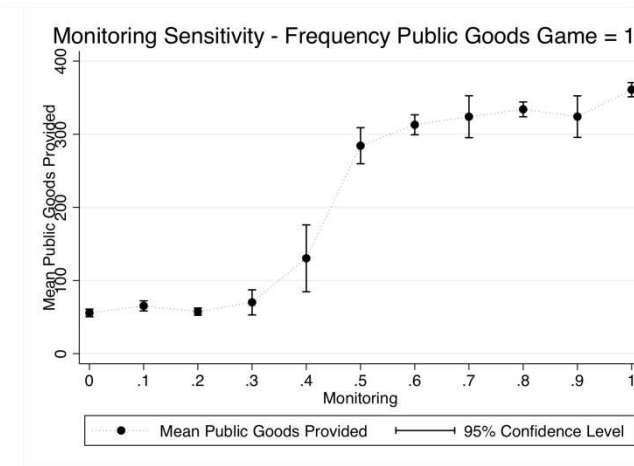
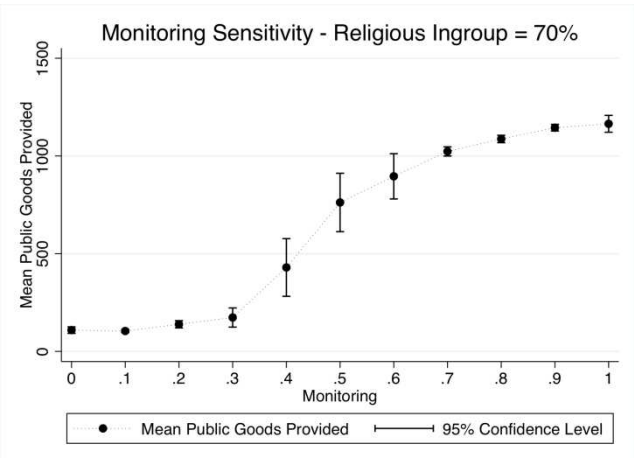
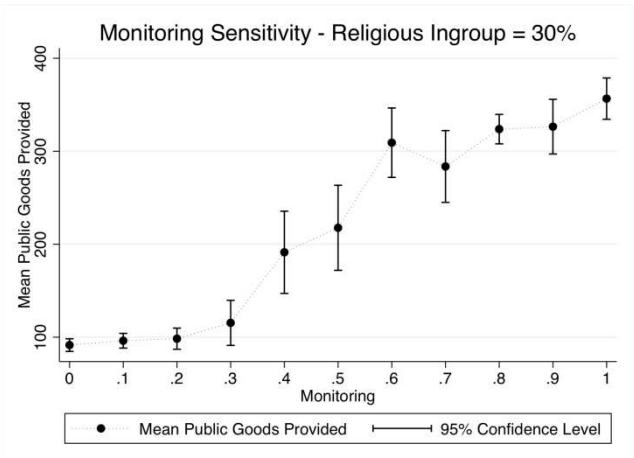
For example, in the baseline monitoring sensitivity analysis, sanctioning was held constant at a value of 7 sanctioned time-steps. As can be seen in Appendix Figure 4 below, when sanctioning is held constant in the monitoring experiments at a value of 5 instead of 7, the general pattern of the baseline model holds. However, the level of monitoring must be higher before we begin to see an increase in the provision of public goods. Whereas an average of over 400 public goods are produced when monitoring is set to .5 in the baseline model, monitoring must be set to .8 before we see similar provision when Sanctioning is set to 5. We also see greater dispersion across model runs. On the other hand, when Sanctioning is set to 9, we see an average of over 400 public goods produced when monitoring is set to .4, and we similarly see tighter dispersion across model runs. We see a similar relationship with regard to the Sanctioning

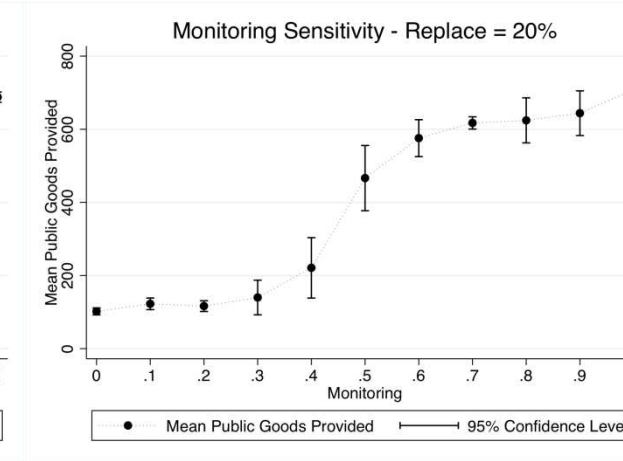
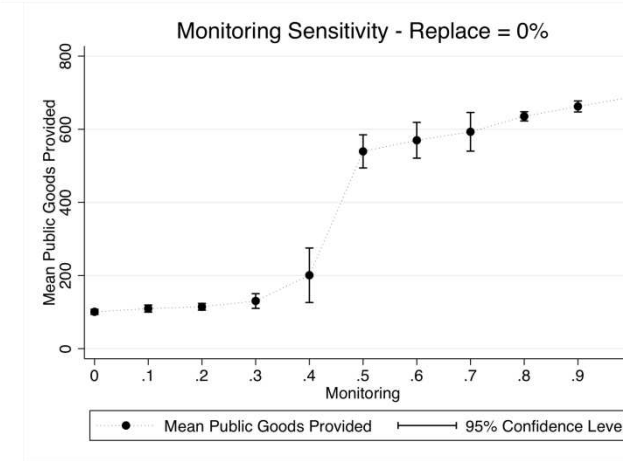
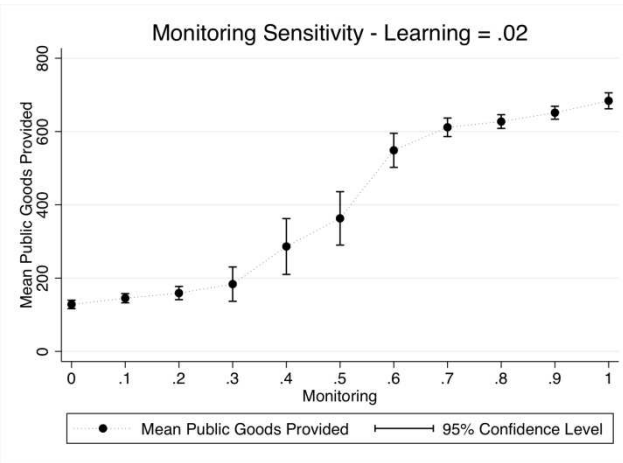
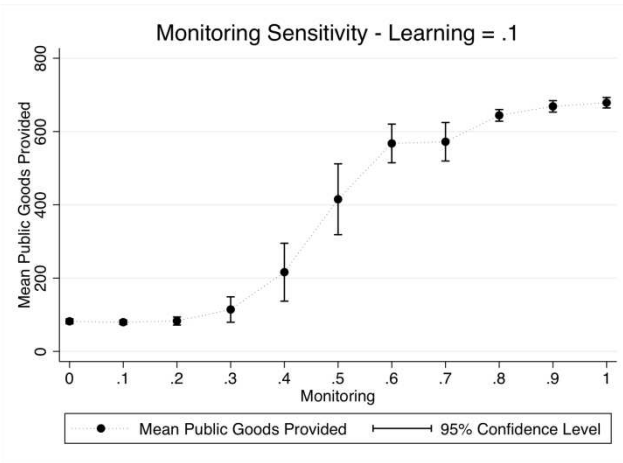
experiments when Monitoring is held constant at .5 (the baseline), held constant at .3, and held constant at .7.

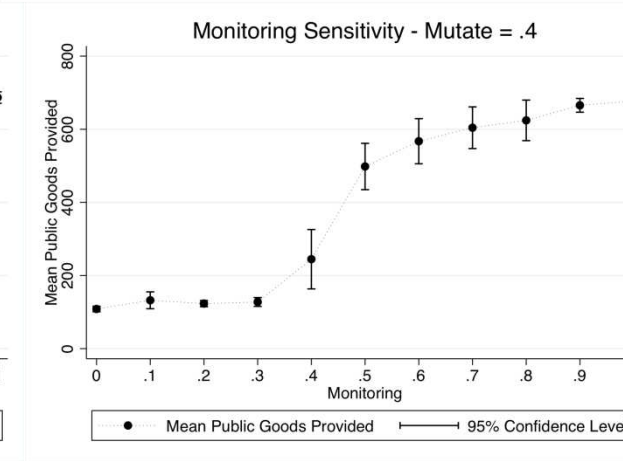
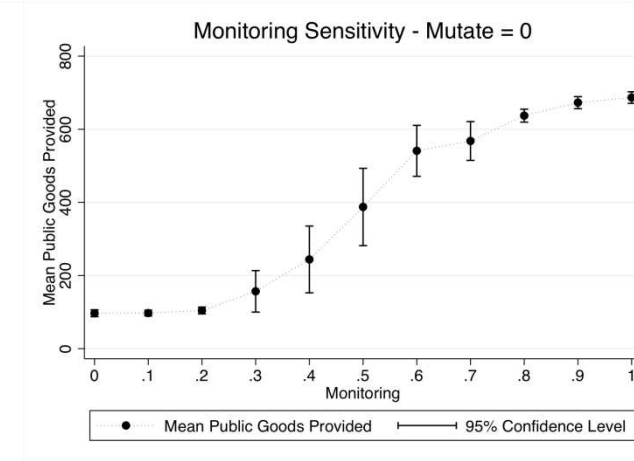
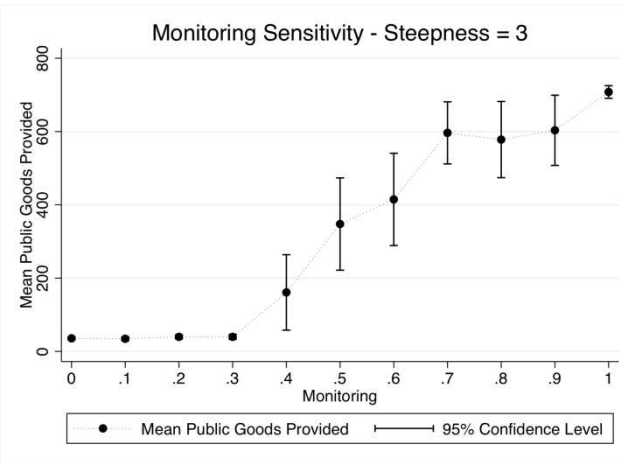
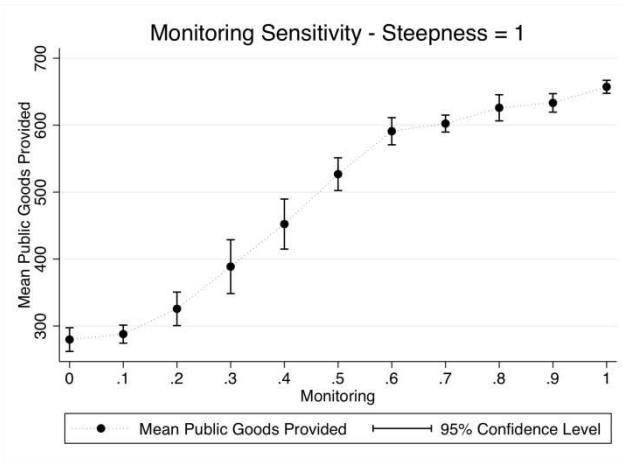
Similar sensitivity checks were then run with anticipated reciprocity/reputation boundary, the percent of theological cooperators, the percent of individuals in the religious in-group, the frequency of the public goods game, the learning rate, and the percent of individuals replaced after each generation. Additional sensitivity checks were run on steepness, the mutation rate, the number of interactions per generation, and the total number of agents in the model. As can be seen from Appendix Figure 4, while each unique parameterization has an impact on the total number of public goods provided and the level of dispersion across model runs, the general relationship between monitoring, sanctioning, and the provision of public goods remains the same as that of the baseline model, suggesting that the relationship found is not simply an artifact of a particular combination of parameterizations.



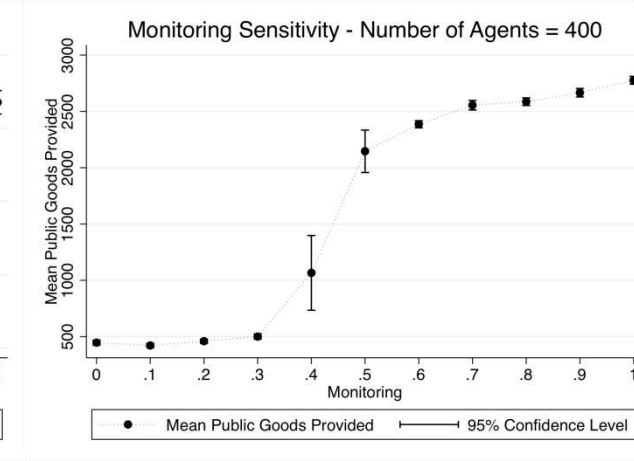
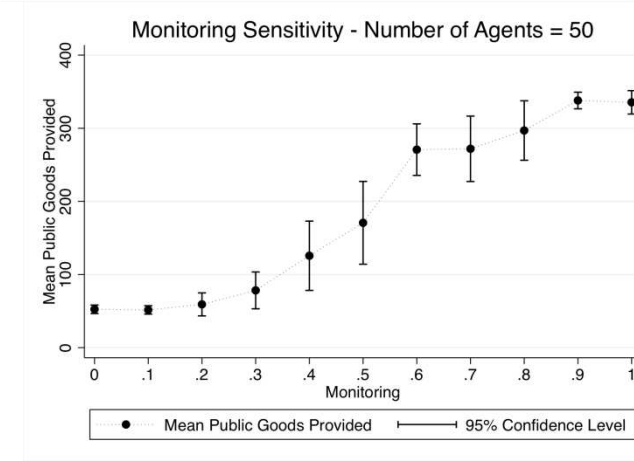
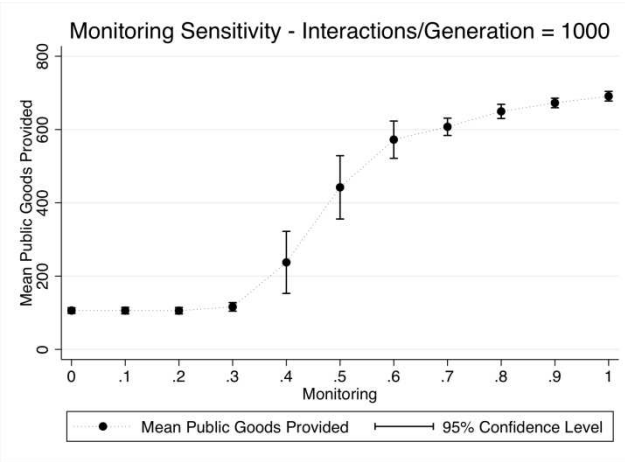
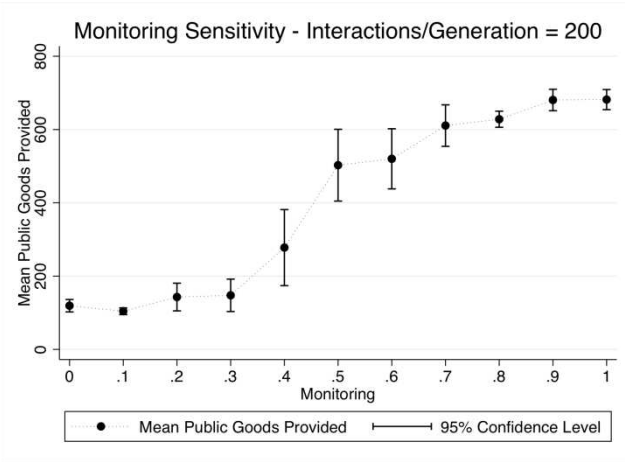


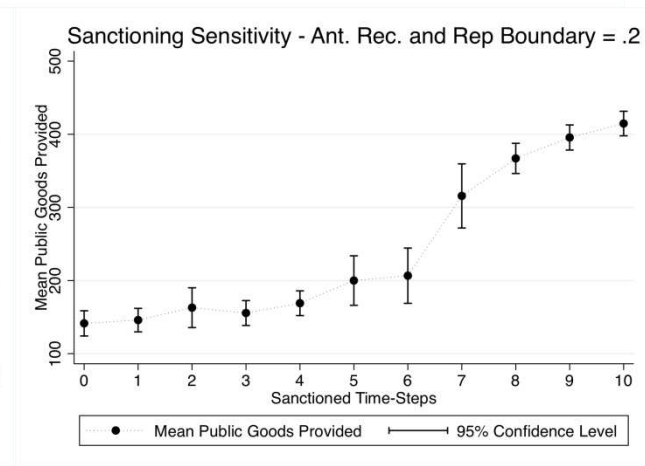
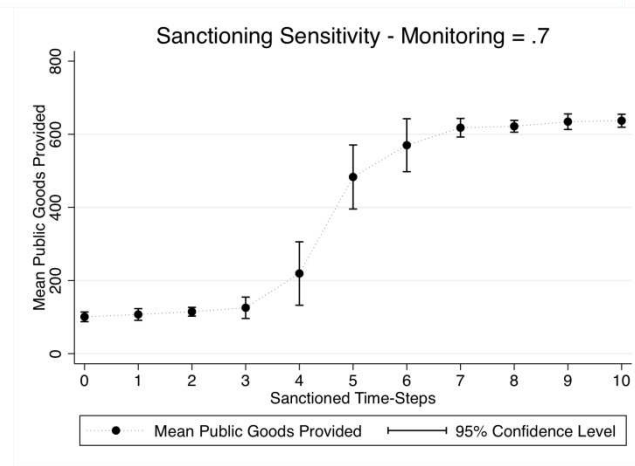
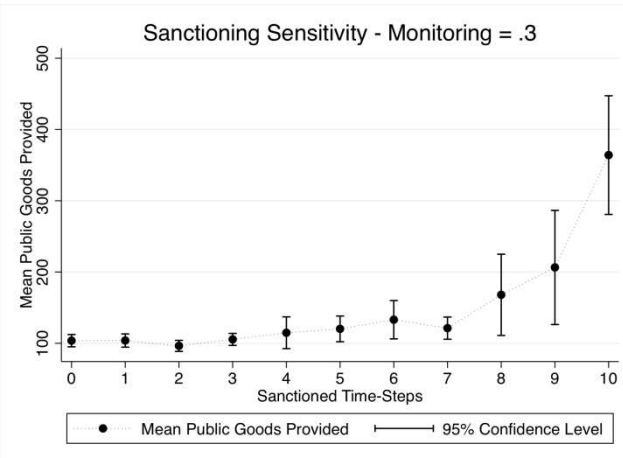
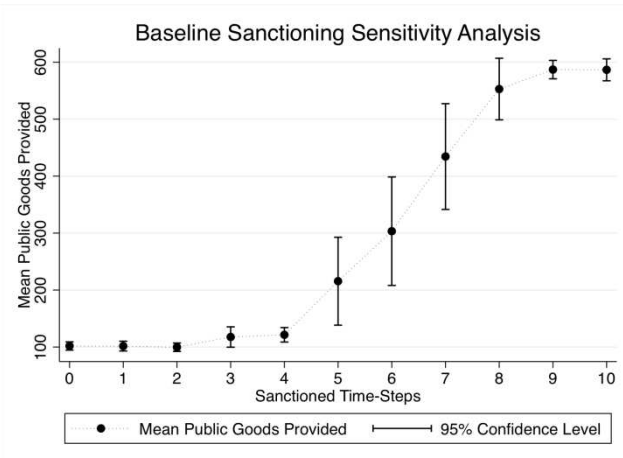


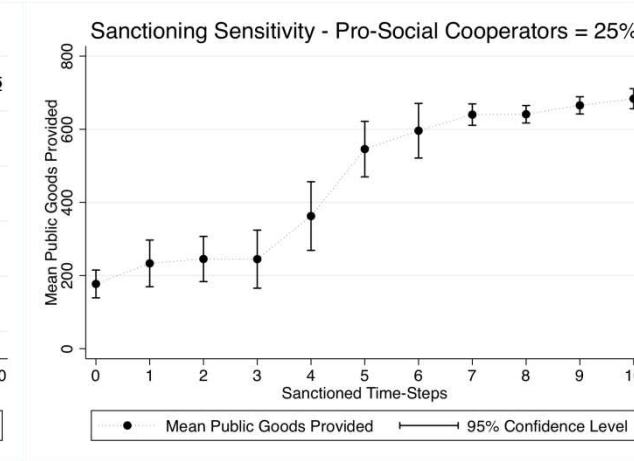
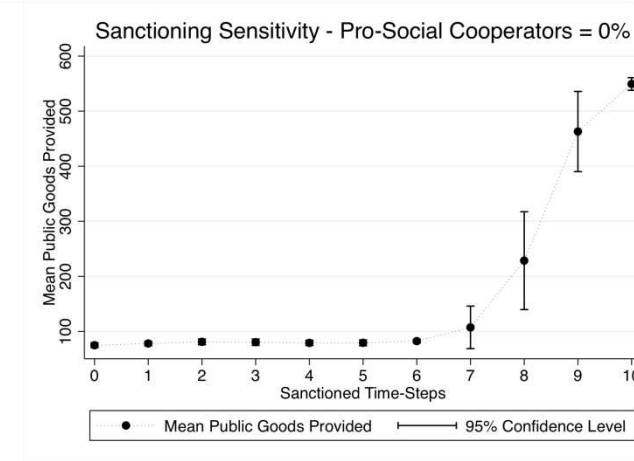
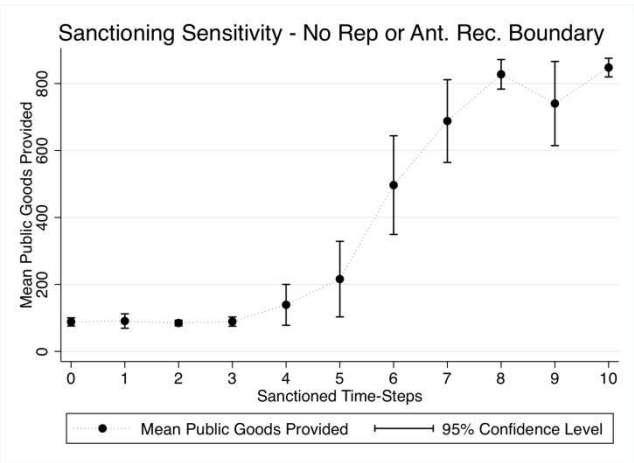
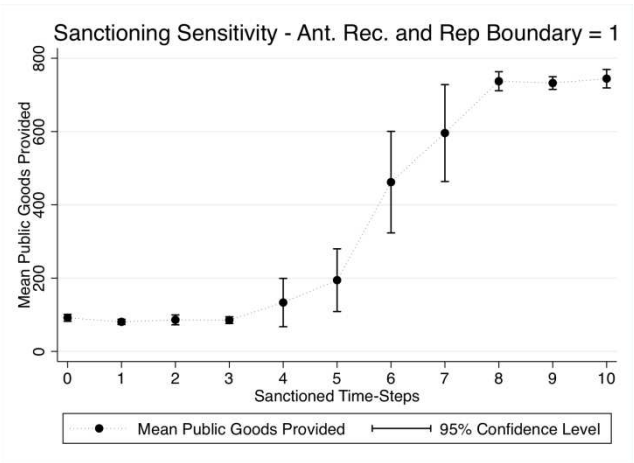


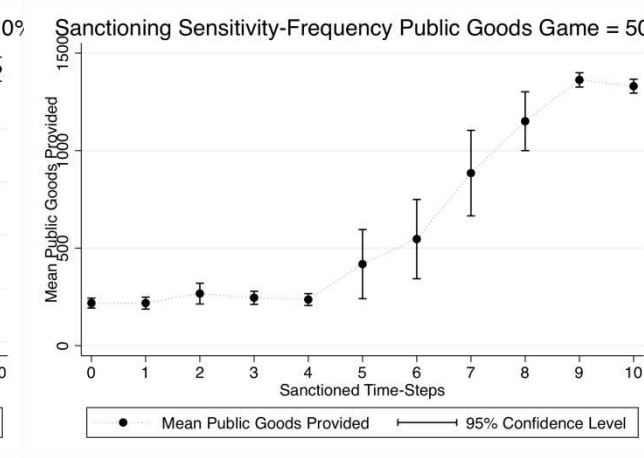
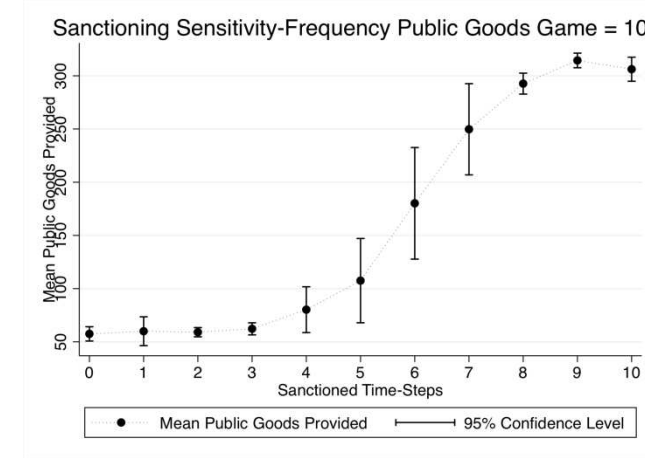
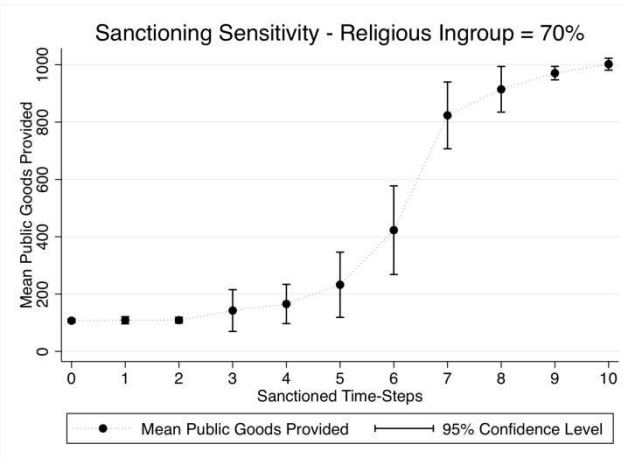
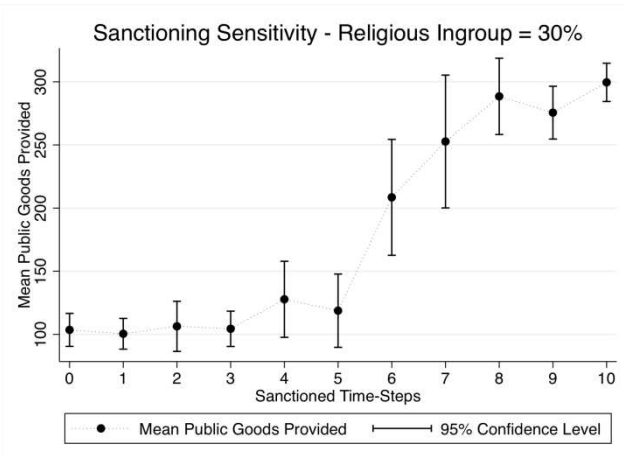


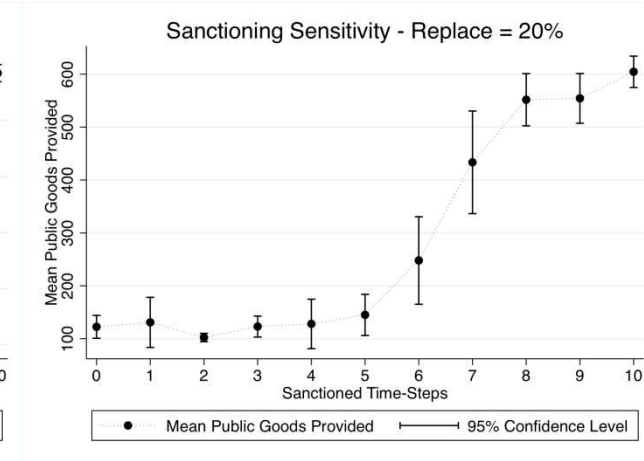
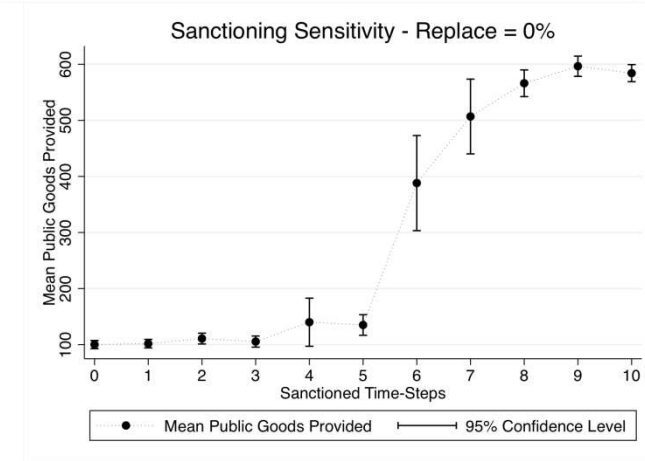
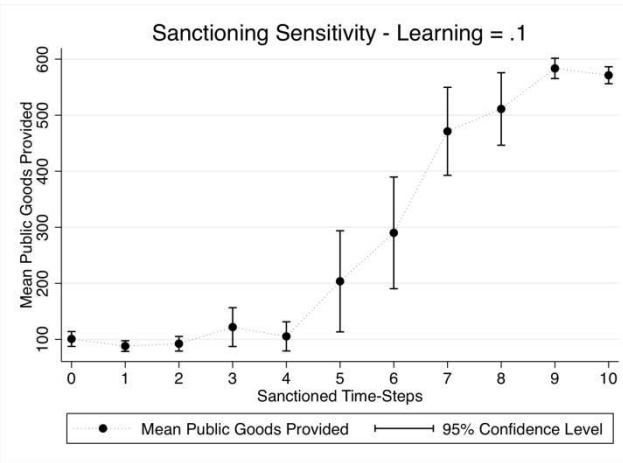
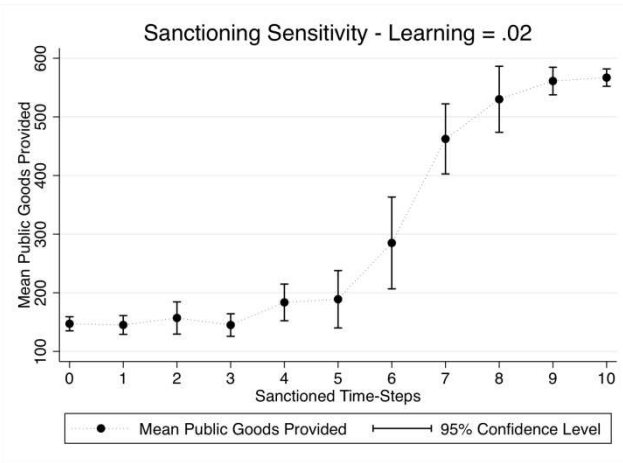


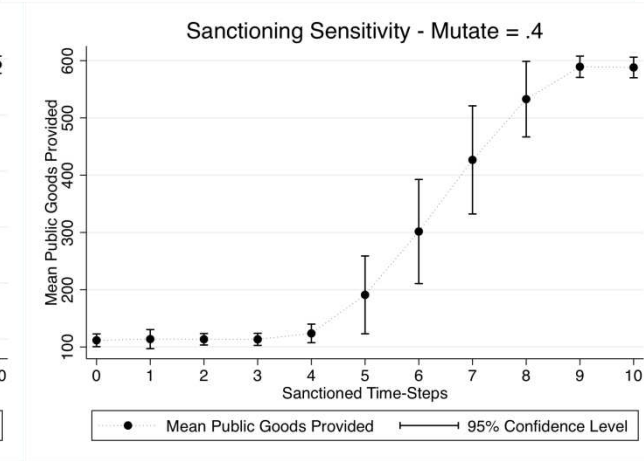
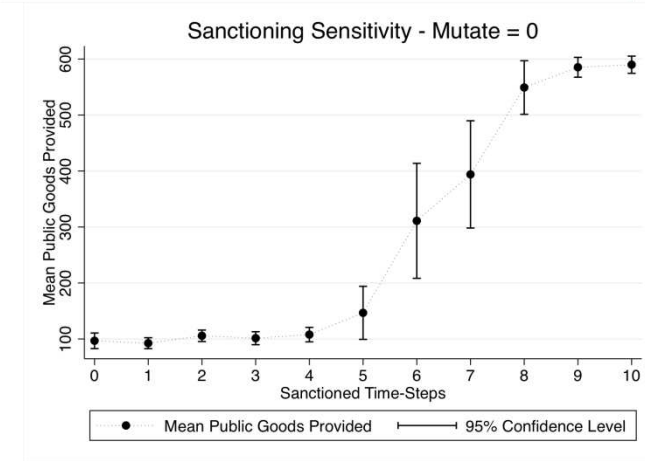
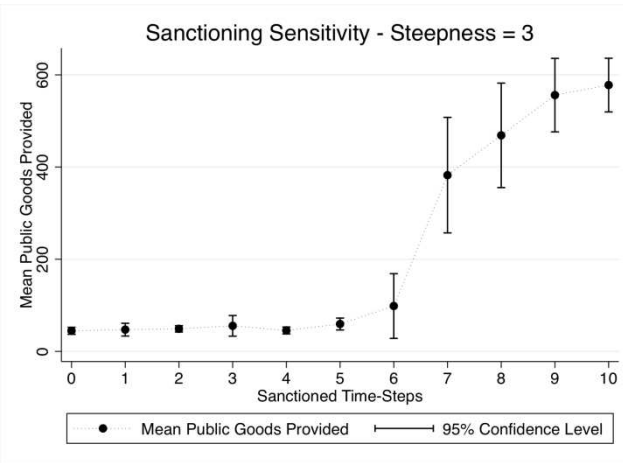
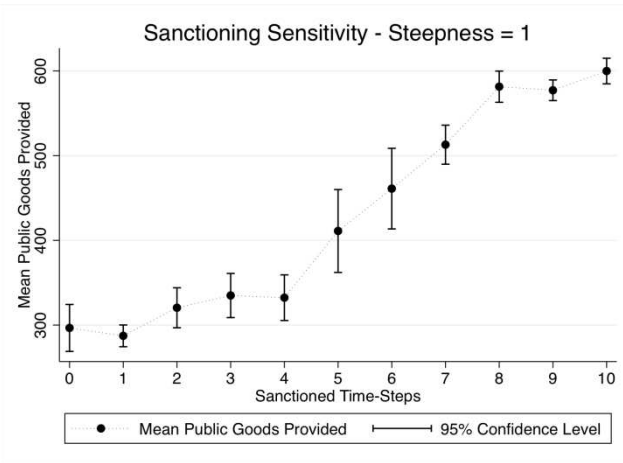


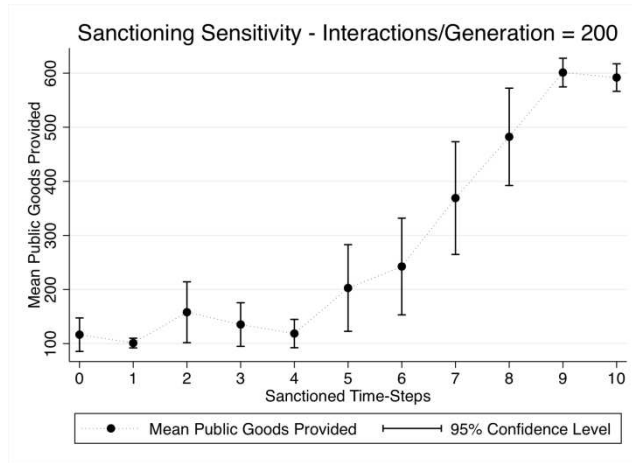












Appendix Figure 4: Sensitivity Analysis

APPENDIX D  
CROSS VALIDATION AND RE-SAMPLING



Appendix Table 1. 5-Folds Cross-Validation

Model	Root Mean Square Error
<i>General Protest</i>	
Estimate 1	0.483
Estimate 2	0.484
Estimate 3	0.491
Estimate 4	0.490
Estimate 5	0.489
<i>Political Protest</i>	
Estimate 1	0.426
Estimate 2	0.416
Estimate 3	0.427
Estimate 4	0.419
Estimate 5	0.419
<i>Count Protest</i>	
Estimate 1	2.434
Estimate 2	2.401
Estimate 3	2.376
Estimate 4	2.486
Estimate 5	2.437
<i>Political Association</i>	
Estimate 1	0.413
Estimate 2	0.402
Estimate 3	0.418
Estimate 4	0.395
Estimate 5	0.414

Appendix Table 2: Sampled and Bootstrap Models- General Protest

VARIABLES	Model 1: Successive 2/3 Samples	Model 2: Bootstrap
	odds ratio	odds ratio
Decentralization	1.317*** (0.086)	1.336*** (0.088)
Religious Competition	2.184* (0.763)	2.372** (0.842)
Ethnic Fractionalization	1.090 (0.231)	1.093 (0.244)
Political Competition	1.000 (0.075)	1.010 (0.086)
Relative Deprivation	0.301 (0.205)	0.320* (0.193)
Ideology	1.651** (0.334)	1.666*** (0.305)
History	0.968 (0.030)	0.970 (0.029)
Good Economic Status	1.223** (0.102)	1.225*** (0.090)
Bad Economic Status	0.940 (0.066)	0.925 (0.074)
Male	1.226*** (0.077)	1.214*** (0.085)
Age	1.000 (0.002)	0.999 (0.002)
Low Religiosity	1.166 (0.105)	1.158 (0.108)
Medium Religiosity	1.198* (0.104)	1.214** (0.102)
High Religiosity	1.330** (0.172)	1.337** (0.178)

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

Appendix Table 3: Sampled and Bootstrap Models- Political Protest

VARIABLES	Model 1: Successive 2/3 Samples	Model 2: Bootstrap
	odds ratio	odds ratio
Decentralization	1.203** (0.092)	1.214** (0.101)
Religious Competition	1.812 (0.672)	1.634 (0.673)
Ethnic Fractionalization	1.095 (0.264)	1.034 (0.216)
Political Competition	1.066 (0.095)	1.067 (0.117)
Relative Deprivation	0.100*** (0.076)	0.109*** (0.093)
Ideology	3.262*** (0.904)	3.178*** (0.731)
History	0.987 (0.035)	0.993 (0.036)
Good Economic Status	1.238** (0.117)	1.191 (0.132)
Bad Economic Status	1.062 (0.089)	1.053 (0.096)
Male	1.315*** (0.096)	1.306*** (0.107)
Age	1.005* (0.002)	1.005** (0.002)
Low Religiosity	1.073 (0.116)	1.074 (0.113)
Medium Religiosity	1.046 (0.108)	1.032 (0.110)
High Religiosity	1.182 (0.173)	1.188 (0.179)

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

Appendix Table 4: Sampled and Bootstrap Models- Count Protest

VARIABLES	Model 1: Successive 2/3 Samples	Model 2: Bootstrap
	odds ratio	odds ratio
Decentralization	1.142** (0.057)	1.133** (0.058)
Religious Competition	1.388 (0.345)	1.404 (0.292)
Ethnic Fractionalization	0.994 (0.160)	0.983 (0.152)
Political Competition	1.026 (0.060)	1.015 (0.054)
Relative Deprivation	0.696 (0.358)	0.747 (0.346)
Ideology	1.195 (0.197)	1.159 (0.192)
History	1.006 (0.026)	1.006 (0.030)
Good Economic Status	1.136* (0.072)	1.132** (0.056)
Bad Economic Status	0.915 (0.050)	0.924* (0.042)
Male	1.189*** (0.057)	1.181*** (0.047)
Age	1.000 (0.002)	1.000 (0.002)
Low Religiosity	1.133 (0.080)	1.120 (0.078)
Medium Religiosity	1.078 (0.073)	1.070 (0.064)
High Religiosity	1.376*** (0.133)	1.321*** (0.124)

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

Appendix Table 5: Sampled and Bootstrap Models- Political Association

VARIABLES	Model 1: Successive 2/3 Samples odds ratio	Model 2: Bootstrap odds ratio
Moderate Decent.	1.379 (0.265)	1.329 (0.248)
Heavy Decent.	3.001** (1.313)	2.890** (1.370)
Religious Competition	2.466** (0.884)	2.236* (0.927)
Ethnic Fractionalization	0.824 (0.194)	0.827 (0.206)
Political Competition	0.945 (0.084)	0.954 (0.100)
Relative Deprivation	0.083*** (0.063)	0.078*** (0.061)
Ideology	1.525 (0.414)	1.480 (0.402)
History	1.095** (0.043)	1.099** (0.044)
Good Economic Status	1.216* (0.117)	1.210** (0.114)
Bad Economic Status	0.848* (0.073)	0.870 (0.088)
Male	1.489*** (0.111)	1.523*** (0.102)
Age	1.014*** (0.002)	1.014*** (0.003)
Low Religiosity	1.157 (0.129)	1.193 (0.141)
Medium Religiosity	1.190 (0.127)	1.212* (0.138)
High Religiosity	1.493** (0.220)	1.534*** (0.236)

Standard errors in parentheses: \*\*\* p<0.01; \*\* p<0.05; \*p<0.1

APPENDIX E  
HUMAN SUBJECTS APPROVAL DOCUMENTATION



**To:** Carolyn Warner  
COOR

**From:** Mark Roosa, Chair  
Soc Beh IRB

**Date:** 08/24/2011

**Committee Action:** Exemption Granted

**IRB Action Date:** 08/24/2011

**IRB Protocol #:** 1106006585

**Study Title:** Religion and Political Activism in Mexico

The above-referenced protocol is considered exempt after review by the Institutional Review Board pursuant to Federal regulations, 45 CFR Part 46.101(b)(2).

This part of the federal regulations requires that the information be recorded by investigators in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects. It is necessary that the information obtained not be such that if disclosed outside the research, it could reasonably place the subjects at risk of criminal or civil liability, or be damaging to the subjects' financial standing, employability, or reputation.

You should retain a copy of this letter for your records.

APPENDIX F

GOOGLE MAPS AND GOOGLE EARTH CONTENT RULES AND GUIDELINES





[Home](#) [On Browser](#) [On Android](#) [On iPhone](#) [Tips and Tricks](#) [Blog](#) [Help](#)

## Maps

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- Google Earth
- Street View
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- Product Logos
- Other

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- Print for private use
- Digital (website, mobile app, or software)
- Media (television, film, or online video)
- Other
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What medium will you be printing our Content in?

- Advertisement
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- Academic Paper or Book
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- Fiction or Non-Fiction Book
- Guidebook
- Item for Resale
- Other

Please review the following rules & guidelines relevant to your project based on your responses:

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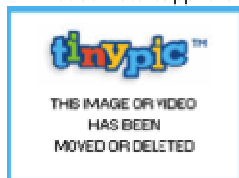
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#### Ensuring Print Reflects Online

When using Maps/Earth Content in print, any images used must reflect how they would look on online. For example, you are not allowed to make any changes (e.g. delete, blur, etc.) to our products that would make them look genuinely different. This includes, but is not limited to, adding clouds or other natural elements, altered user-interfaces, and modification that do not appear in the actual product.

However, Google offers a [Styled Maps API](#) which allows you to edit the colors of individual map components as well as toggle visibility for each component (i.e. change water to purple and make roads invisible).

#### Keeping it 'Google'

Google Maps and Earth are geography exploration tools and are not to be used to extract Content for derivative uses that do not relate to the products. For example, tracing Google Maps or Google Earth imagery for an alternative use is not allowed. Also, whenever you wish to use our Content in print, your use should make use of a distinctive aspect of our products. Distinctive aspects of the products include :

Google Maps:

- Satellite Imagery w/ labels ([example](#), [not allowed](#))

- My Maps ([more info](#))
- Maps with search results ([example](#))
- Driving, walking, biking, or transit directions ([more info](#))

Google Earth (see [Media Features](#)):

- Views of terrain
- 3D buildings and trees
- Paths and polygons
- Historical images
- Ocean view and other layers

Any use that shows Google Maps or Google Earth in context, such as a product tutorial or news article about a feature, is OK provided it shows the entire Google Maps webpage or Google Earth application.

#### [Printing High-Resolution Imagery](#)

We cannot provide high-resolution or vector screen captures of Google Maps. For high-resolution imagery from Google Earth, you must use [Google Earth Pro](#). Stitching printed images together to create a larger map is also not permitted.

[Tell us how we're doing](#) - Answer five short questions about your help center experience