How Immigration Shapes Politics: Populism, Labor Movements, and Political Preferences in Brazil *

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Abstract

Despite extensive research on the relationship between the urban working class and populism in postwar Latin America, empirical evidence remains limited. This paper examines the impact of immigration during the Age of Mass Migration (1890-1920) on political outcomes in Brazil. We ask whether immigration to São Paulo increased electoral competition, given its crucial role in the country's development. Exploiting cross-municipality variation in immigration that arises from the interaction between overall immigrant inflows and the expansion of São Paulo's railway network, we find that a higher share of immigrants led to increased support for labor-related candidates in the first competitive presidential elections during the 20th century (1955 and 1960). This finding challenges the conventional view that urban workers supported populist leaders regardless of whether or not they were aligned with conservative groups. These effects persisted even after Brazil returned to democracy in 1985. Our analysis suggests that immigration increased electoral competition in Brazil, exacerbating social and economic tensions that culminated in the 1964 military coup.

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1 Introduction

Populism has become increasingly prevalent in Europe and the United States (Inglehart and Norris, 2017; Guriev and Papaioannou, 2022). In Latin America, literature has associated populism with the political incorporation of the expanding urban working class during the region's rapid postwar industrialization (Weffort, 1978; Conniff, 1981; Gomes, 2005; Joseph, 2008). Leaders such as Lázaro Cárdenas in Mexico, Juan Perón in Argentina, and Getúlio Vargas in Brazil implemented policies that addressed the needs of the urban working class, including wage increases, social security, and labor rights (Conniff, 2012). Despite extensive research on this topic, empirical evidence connecting the expansion of the urban working class to the rise of populist leaders remains limited. Moreover, we know much less about whether Latin American voters in the twentieth century could distinguish between populist leaders across different political ideologies.

This paper addresses these gaps by examining how historical immigration during the Age of Mass Migration (1890-1920) shaped electoral outcomes in postwar Brazil. The focus on immigration is particularly significant, as it played a crucial role in the country's industrialization, coinciding with the expansion of voting rights and the rise of populism. Following the end of Vargas' dictatorship and the establishment of democracy in 1945, Brazil experienced the emergence of a multiparty system divided between pro- and anti-Vargas groups, marking the beginning of its first democratic experience. From 1945 to 1964, Brazilian elections became competitive for the first time, with outcomes no longer determined by oligarchic agreements (Campello de Souza, 2006; Lavareda, 2012). The phenomenon of populism was more pronounced in São Paulo, the most industrialized and urbanized region, which attracted the highest inflow of European immigrants in the early twentieth century (Weffort, 1978; Hagopian, 1996).

In this context, we ask whether the presence of immigrants contributed to the increasing electoral competition in Brazil. To examine the influence of immigrants on political preferences, we digitize a novel dataset containing electoral outcomes at the municipality level from the 1955 and 1960 presidential elections. These elections are particularly relevant for several reasons. First, the 1945 elections were not representative due to government control over the voter registration process, which compromised the political system's integrity (Campello de Souza, 2006, p. 121).[1]

[1]In 1945, voter registration could occur voluntarily by the citizen or through the *ex-officio* method, in which unions and public office heads were responsible for registering voters by sending a list of their employees to the electoral authorities. This approach accounted for 33 percent of voters in São Paulo and has been considered a clientelistic strategy, particularly in urban areas (Campello de Souza, 2006, p. 121). The *ex-officio* method was abolished by the Electoral Code on July 24, 1950.

Second, the 1950 elections were not competitive. They were characterized by significant polarization between pro- and anti-Vargas groups, resulting in Vargas's election with over 48 percent of the votes. Conversely, the 1955 elections introduced an official ballot paper, which diminished the influence of local elites and enabled voters to express their choices freely.[2] To assess the long-term persistence of political preferences, we complement the analysis with electoral results of the presidential elections held after the military dictatorship (1989-2022).

By combining these novel electoral data with variation at the municipality level in the exposure to historical immigration, we can assess the impacts of immigrants on political preferences and whether these preferences persisted after long periods of non-democratic regimes. To estimate a causal effect of immigration on political outcomes, we use an instrumental variable approach that combines immigrant inflows with the expansion of São Paulo's railway network (Sequeira et al., 2020). This method exploits the timing of railway expansion and the variability in immigrant flows caused by shifts in migration policies, conflicts, and other shocks in source countries to generate exogenous variation in immigration patterns. The intuition is that municipalities connected to the railway just before a surge in immigration were more likely to attract migrants from that wave than those connected afterward.

The state of São Paulo represents an ideal case for examining these issues. Between 1872 and 1920, São Paulo experienced a dramatic population surge, absorbing nearly 1.8 million immigrants—more than double its initial population. These immigrants constituted a significant fraction of the workforce, with growth rates exceeding those of the United States (Merrick and Graham, 1979, p. 109). Initially, these immigrants settled in rural areas to work on São Paulo's coffee plantations. However, they gradually migrated to urban centers where they constituted a substantial share of the manufacturing workforce and emerged as successful entrepreneurs (Dean, 1969; Suzigan, 1971). Notably, around 54 percent received state subsidies between 1889 and 1927.

By 1940, São Paulo's urbanization rate reached 44 percent, surpassing the national average of 33 percent. The industrial census confirmed São Paulo as Brazil's primary industrial center, accounting for 28.8 percent of industrial establishments, 34.9 percent of the industrial workforce, and 39.4 percent of the total value added by the country's industry (Suzigan, 1971). In the 1960 presidential election, over 3 million people voted in São Paulo, representing nearly one-quarter of the national electorate and exceeding the combined number of voters in the North and North-

[2]Before 1955, voters would arrive at polling stations with pre-filled ballots provided by the candidates, a system that favored larger parties and candidates with greater economic power. Voting consisted of placing the pre-filled ballot into an official envelope and inserting it into the ballot box (Nicolau, 2022).

east regions. Despite having the highest industrial workforce and a highly urbanized population—attributes emphasized in the literature as significant for labor votes—São Paulo was, on average, a conservative state.[3]

Our findings reveal that the presence of immigrants increased support for labor candidates in both the 1955 presidential and vice-presidential elections. Specifically, a one standard deviation increase in historical immigration share correlates with a 6.55 percentage point increase in the vote share for Juscelino Kubitschek, the labor candidate elected president, and a 10.24 percentage point increase for João Goulart, the Brazilian Labor Party (PTB) vice-presidential candidate who emerged from the urban labor movement and has been considered Vargas's political heir. Furthermore, our findings suggest a 3.94 percentage point decrease in support for Milton Campos, the candidate for president representing the main conservative party. We find similar patterns for the 1960 elections. In particular, a one standard deviation increase in the share of European immigrants is associated with a 7.0 percentage point increase in Goulart's vote share and a 5.94 percentage point decrease in the vote share for Jânio Quadros, the populist candidate supported by conservative parties.

Our results remain robust when excluding various sets of municipalities that might differ systematically from the average. Specifically, we exclude municipalities with immigrant colonies, those located in key coffee-producing zones, and early railway-connected areas. One main concern is that our results are driven by the accelerated urbanization and industrialization process in São Paulo rather than by the presence of immigrants. We thus control for the share of individuals living in urban areas and the fraction of those working in manufacturing employment in 1940. The inclusion of these controls does not change our results. Moreover, we account for potential variations in land distribution across municipalities to ensure that initial land inequalities do not drive our findings.

We also analyze the mechanisms through which immigration affected political outcomes in São Paulo. Immigration policies from the late nineteenth century prompted a significant inflow of foreign labor to the state, initially intended for coffee plantations. However, an oversupply of workers led many to transition to the industrial sector in the first years of the twentieth century, driving São Paulo's urban transformation. Although first and second-generation immigrants were

[3]In the 1960 presidential election, conservative candidate Jânio Quadros received 52.2 percent of the votes in São Paulo, while the candidate supported by the Brazilian Labor Party (PTB) and other left-wing parties received only 14.5 percent, representing the highest margin between the two candidates among all Brazilian states. Moreover, only 30.9 percent of São Paulo voters supported João Goulart, Vargas's former labor minister and the main labor-related candidate, compared to an average of 42 percent nationwide.

initially excluded from formal politics, they constituted a major fraction of the industrial workforce and played a vital role in the labor movement's development. Brazil's democratization in the 1950s, combined with rapid industrialization and urbanization, fostered a political environment increasingly responsive to the needs and concerns of urban workers, including immigrants and their descendants. Consistent with historical accounts, we document that European immigrants significantly influenced urbanization and increased the share of manufacturing employment between 1920 and 1960.

Having established the impact of immigration on political outcomes in the medium term, we then investigate the persistent nature of these effects in the long run. To do so, we focus on the first rounds of the presidential elections between 1989 and 2022. Consistent with our earlier findings, we document positive effects of immigration on the support for labor parties in the long run. Specifically, our point estimates indicate that a one standard deviation increase in historical immigration share corresponds to a 5.05 percentage point increase in the vote share for labor parties in the 1989 elections. Similar magnitudes are observed from 1994 to 2002, with all estimates statistically significant at conventional levels. Consistent with existing research on the intergenerational transmission of immigrant characteristics (Fernández and Fogli, 2009; Alesina et al., 2013; Hornung, 2014; Giuliano and Tabellini, 2022), these findings suggest that political preferences in São Paulo persisted over time, even following an extended period of military dictatorship characterized by restricted voting rights and the lack of party representation.

This paper contributes to several strands of literature. First, it provides some of the first empirical evidence on how industrialization and urbanization shaped voting patterns in São Paulo during Brazil's initial democratic experience (Simão, 1956; Weffort, 1978; Lamounier and Cardoso, 1978; Conniff, 1981; Gomes, 2005). Our findings indicate that the middle and urban working classes increasingly supported labor candidates, likely contributing to the growing polarization that culminated in the 1964 military coup. Additionally, this paper adds to the historical literature on Latin American populism by empirically demonstrating that postwar democracy in Brazil symbolized a commitment to enhancing political participation among the working class while focusing on social and economic progress for marginalized segments of the population (Joseph, 2008).

We also expand the analysis to include the role of mass migration in shaping these patterns, which has been overlooked in the existing literature on the urban working class's effects on populism in Latin America. One notable exception is Lazzaroni (2021), who provides evidence that Italian immigrants played a significant role in the emergence of Peronism in Argentina by dis-

seminating populist ideologies. We add to this literature by showing that voters in regions with substantial immigrant populations could distinguish between populist leaders aligned with labor interests and those advocating a conservative agenda. These effects were particularly pronounced in São Paulo, the most industrialized region in Latin America and one of Brazil's most conservative states.

Finally, our paper contributes to the broader literature on the Age of Mass Migration. Previous studies have examined the selection and assimilation of European immigrants in the United States (Abramitzky et al., 2014; Abramitzky and Boustan, 2017; Abramitzky et al., 2020). Similarly, Lafortune et al. (2019) and Sequeira et al. (2020) have explored the short- and long-run effects of historical immigration on economic development. Tabellini (2020) has investigated the causes of anti-immigration sentiments in the short run, highlighting the initial backlash triggered by ethnic diversity brought about by European immigrants. In Argentina, Droller (2018) finds that European immigration positively affected economic development in the long run. The author shows that European immigrants had higher levels of human capital compared to native Argentinians, which in turn facilitated the supply of skilled labor for the country's industrial sector. Research for Brazil has focused on the link between immigrants' human capital and long-term economic and educational outcomes (de Carvalho Filho and Monasterio, 2012; Stolz et al., 2013; Rocha et al., 2017; Witzel de Souza, 2018). Our paper contributes to this literature by offering new evidence on the impact of immigration on political preferences in a developing country with historical challenges to free and fair elections.

2 Oligarchy and Populist Democracy

Oligarchic domination and electoral fraud characterized the political system of Brazil's First Republic (1889-1930). A small group of wealthy landowners from São Paulo and Minas Gerais concentrated power, controlled political parties, and manipulated elections to preserve their influence. At the local level, large landowners, known as "colonels", exercised absolute authority over the rural population, using clientelism, fraud, and coercion to manipulate electoral outcomes. Aligning with state-level oligarchs was crucial for securing resources necessary for public goods, which were distributed through patronage to ensure sustained political support (Leal, 2012). The political system changed only when a crisis disrupted the relationship between the central states of São Paulo and Minas Gerais. Growing discontent among poorer states and internal disputes

over presidential succession culminated in the 1930 Revolution.[4] Led by Rio Grande do Sul and supported by Minas Gerais and several smaller states, this revolution effectively dismantled the Oligarchic Republic (Hagopian, 1996).

The Vargas Era (1930-1945) marked the transition from regional political power to a highly centralized regime centered around the president. During his government, Vargas expanded the state's role and implemented economic policies to balance different interests while incorporating emerging urban populations into the political system (Hagopian, 1996). From 1937 to 1945, Vargas ruled under an authoritarian regime known as "Estado Novo". He dissolved political parties, abolished direct elections for governors and mayors, and centralized political power by dismissing federal and state legislatures and nominating "interventors" as the new chief executives in the states. To circumvent the Estado Novo's ideological repression, political groups such as the Brazilian Communist Party operated clandestinely. It was only with the 1945 military intervention, triggered by the end of World War II, that Vargas's dictatorship ended, leading to a period of political liberalization and renewed party competition.

The return of representative democracy in 1945 marked a new era for Brazil, which had experienced significant transformations since the 1930s. Rapid industrialization and urbanization eroded the power of traditional agrarian elites, creating a complex political landscape shaped by nationalism, communism, and liberalism (Conniff, 1981). Oligarchies could no longer control the political system in an environment marked by the consolidation of political parties and increased political participation (Lavareda, 2012).[5] Real electoral competition replaced the previously predictable outcomes dictated by oligarchic agreements. These changes were most noticeable in urban areas, and while the influence of oligarchs persisted in rural areas, their impact on national politics weakened significantly.

Between 1945 and 1964, many new participants, especially from urban areas in the South, entered the political system through loose associations with charismatic leaders, parties, and institutions, often characterized as populist (Hagopian, 1996, p. 57). It was in the state of São Paulo, the

[4] An alliance between São Paulo and Minas Gerais, where the two states alternated the presidency, marked the First Republic. This power-sharing arrangement collapsed when Paulista President Washington Luís broke tradition by nominating another Paulista, Júlio Prestes, as his successor. Feeling betrayed, Minas Gerais aligned with the "Liberal Alliance", led by Getúlio Vargas, a coalition of tenants, civilian supporters, and smaller states. When Prestes was declared the election winner amid widespread allegations of fraud, it sparked a military rebellion. With troops advancing on Rio de Janeiro from various fronts, senior officers intervened to prevent a civil war, deposing Washington Luís and installing Vargas as president in 1930 (Skidmore, 1982).

[5] The percentage of the population participating in the political process rose from 5.7 percent in the 1930 presidential election to 13.4 percent in 1945, and it continued to rise to 18.1 percent in 1960 (Love, 1970, p. 9).

region with the most intense industrial development in the country, where populism first emerged with political significance (Weffort, 1978, p. 28). The expanding urban working class emerged as a powerful political force in Brazilian politics. This burgeoning urban-based proletariat constituted a core constituency for populist politicians advocating economic and social reforms (Conniff, 1981). Leaders from different ideological spectrums mobilized workers through unions and mutual aid societies, promising improved living conditions.

The first presidential election in Brazil's new democratic period occurred in 1945 but lacked genuine representation. Vargas attempted to control the transition to maintain the power of the elites aligned with him and secure his political position (Campello de Souza, 2006). Nevertheless, the rapid rise of the main opposition party, the National Democratic Union (UDN), led to an alliance with military officials that ultimately removed him from office. The Social Democratic Party (PSD), founded by Vargas's supporters, launched General Eurico Gaspar Dutra, Vargas's former Minister of War, who played a role in the coup and was elected president with the support of another pro-Vargas party, the Brazilian Labor Party (PTB). Although UDN accepted the election results, some members attributed their loss to state control over the voter registration process, particularly among urban workers. According to Campello de Souza (2006), the 1945 elections were not representative due to the *ex-officio* registration system, in which unions and public office managers registered voters by submitting employee lists to electoral authorities.

The second presidential election in 1950 was not competitive. Vargas, supported by a coalition of the PTB and the Social Progressive Party (PSP), was elected president with a vote share of 48.73%. This time, the UDN contested the results and emerged as a strong opposition force, triggering a political crisis that eventually culminated in Vargas's suicide in 1954. The political instability persisted into the third presidential election in 1955. Juarez Távora, a military officer and former ally of Vargas, ran as the UDN candidate. The PSD nominated Juscelino Kubitschek, governor of Minas Gerais and a Vargas admirer, who chose João Goulart, Vargas's political heir from the PTB, as his vice-presidential candidate.[6] Some conservatives within the UDN responded to the PSD-PTB alliance by advocating for a military coup to prevent the elections. Despite these efforts, Kubitschek and Goulart were elected president and vice-president, respectively. When the opposition attempted to prevent them from assuming office, General Henrique Lott, supported by the winning parties, led a decisive armed intervention to guarantee that the elected candidates took office.

[6]Since 1950, the president and vice president have been elected independently under a plurality voting system.

The 1960 presidential elections were a turning point for the country's newly established democracy. Jânio Quadros, the popular governor of São Paulo, ran with the support of a coalition of smaller conservative parties and the UDN. Quadros was a charismatic populist leader whose campaign resonated with the public, unlike his opponent, General Henrique Lott. The PSD-PTB candidate, considered a democratic nationalist aligned with a leftist agenda, struggled to connect with voters. Quadros was elected president, receiving 48.26% of the vote and becoming the most popular presidential candidate in Brazilian history up to that point. Supported by the PSD, João Goulart was elected vice president for the second time.

A new political crisis started when Quadros resigned after only seven months in office, as many Brazilian elites viewed Vice President João Goulart as a dangerous politician due to his close association with leftist movements. The political situation further deteriorated when the three military ministers issued a statement expressing their opposition to Goulart assuming the presidency. The coup did not materialize, but the political system was adapted to create a legal agreement, and Goulart took office under a parliamentary system. During his time in office, Goulart tried to implement policies that were considered a threat to the economic interests of several groups. These policies included land reform and the enfranchisement of illiterate people. The possibility of a military coup significantly increased, and it was only a matter of time before it happened in 1964.

3 São Paulo in the Age of Mass Migration

In the late nineteenth century, industrialization and demographic changes in Europe led to significant emigration inflows, with many Europeans seeking opportunities abroad (Hatton and Williamson, 1998). Between 1872 and 1920, Brazil became the fourth most important destination for European migrants, receiving over 3.3 million immigrants. The state of São Paulo was the main receiving region, absorbing nearly 1.8 million immigrants, a remarkable number considering its initial population of 837,354 inhabitants in 1872.[7] The mass migration from Europe coincided with São Paulo's rise as one of the world's largest coffee producers and the most developed region in the country (Love, 1980).

European immigration to São Paulo increased in the second half of the nineteenth century in response to the rapid expansion of coffee plantations and the world's largest subsidized immigration

[7]Online Appendix Figure A1 presents the share of São Paulo in the total inflow of immigrants to Brazil between 1872 and 1920. During this period, the state received 53.2 percent of all immigrants and absorbed approximately 80 percent in specific years.

program. The support for foreign immigration increased with the imminent abolition of slavery in 1888 to rapidly expand the labor force while keeping labor costs low (Andrews, 1988). The government introduced policies to attract farming families without economic resources, offering financial incentives like transportation subsidies and land grants. In 1886, coffee farmers created a private but state-funded Immigration Promotion Society (*Sociedade Promotora da Imigração*) to manage the immigration program.[8] Its primary responsibility was to ensure a steady labor supply for coffee farms by promoting European immigration, which included disseminating propaganda, covering transportation expenses for European farming families, providing housing, and allocating immigrants to coffee plantations across the state (Holloway, 1980; Lanza et al., 2023).

Immigrants with state-subsidized travel expenses were required to enter São Paulo through the Immigration Hostel (*Hospedaria dos Imigrantes*) in the capital. The hostel provided food, lodging, medical assistance, and free train tickets to their final destinations. It also included a labor office that helped immigrants find employment on coffee farms. After signing a contract, immigrants were committed to working on a farm for at least one year before they could either revisit their contract terms or return to the hostel to seek new employment opportunities (Holloway, 1980; Lanza et al., 2023). To facilitate the transport of immigrants to their final destinations in the interior of the state, the hostel was connected to a railway station. Figure 1 shows the inflow of total and subsidized immigrants to the state of São Paulo from 1881 to 1927. From 1889 to 1900, 80 percent of the immigrants to São Paulo had their passages subsidized by the state government. Between 1889 and 1927, nearly 2,250,000 foreigners entered São Paulo, with about 54 percent receiving state subsidies.

The composition of immigrants arriving in São Paulo fluctuated over time, especially after 1900. Figure 2 presents the share of immigration to São Paulo from each country of origin between 1882 and 1930. From the abolition of slavery until the end of the nineteenth century, Italians were the predominant group, constituting 73 percent of all arrivals between 1887 and 1900.[9] Spaniards also represented a significant group, representing 11 percent of arrivals between 1887 and 1900. Portuguese immigration followed similar trends to the Spaniards, with notable peaks in the 1890s and between 1904 and 1914. Unlike Italians and Spaniards, Portuguese migration was driven more by family ties and established networks than government subsidies. A significant shift in immigration patterns occurred in the early twentieth century, leading to a more diverse immi-

[8] In 1895, the Secretary of Agriculture, Commerce, and Public Works of São Paulo incorporated the Immigration Promotion Society and assumed responsibility for the entire subsidization program (Holloway, 1980).

[9] Between 1888 and 1897, Brazil attracted more Italian emigrants than any other country (Holloway, 1980, p. 71).

grant population. Concerns about migrant conditions, especially on coffee plantations, led several European nations to ban subsidized emigration to Brazil, with the 1902 Italian Decreto Prinetti being particularly significant in making such subsidies illegal. From 1901 to 1930, the share of Italians fell to 26 percent, while the share of Spaniards increased to 22 percent, Portuguese to 23 percent, and other nationalities reached 28 percent (Holloway, 1980, p. 73).

3.1 Existing Research on the Effects of European Immigration in Brazil

A growing body of research has documented the impacts of immigrant human capital on Brazilian development. de Carvalho Filho and Colistete (2010) and Rocha et al. (2017) document significant long-term effects of European immigration on human capital and educational resources in São Paulo. Notably, Rocha et al. (2017) shows that subsidizing policies attracted more educated immigrants to specific regions, improving income per capita in the long run. These results are consistent with Stolz et al. (2013), who document positive and persistent effects of immigrants on the stock of human capital in Brazil. Complementing this literature, Craig and Faria (2021) show that the demand for education varies with immigrants' experiences with public education and their religious backgrounds, while the supply of education depends on social capital and immigrants' community size. Lopes et al. (2024) provide further evidence of the effects of different ancestries on academic achievement by analyzing individual-level data. The authors show that students with non-Iberian ancestry exhibit higher promotion rates and scores on nationwide standardized tests.

A different strand of literature emphasizes not the higher education levels of immigrants but the institutions they introduced (Acemoglu et al., 2014). Witzel de Souza (2018) finds that having German immigrants in São Paulo did not directly affect human capital accumulation; instead, the founding of schools by these immigrants was crucial for positive long-term outcomes. Similarly, Colistete (2017) shows that the arrival of immigrants intensified the existing demands of Brazilian families for primary education in São Paulo, while de Carvalho Filho and Monasterio (2012) find that regions close to German colonies in the Rio Grande do Sul state have lower inequality and higher educational levels today. The authors attribute these outcomes to a more egalitarian land distribution system within state-sponsored settlements rather than the immigrants' higher human capital.

Focusing on the impact of European immigration on São Paulo's agricultural sector, Lanza et al. (2023) find that a higher fraction of European immigrants was associated with increased

coffee output per farm and greater adoption of agricultural tools and machinery in 1920 at the municipality level. In a related work focusing on Brazil, Escamilla-Guerrero et al. (2024) find that a higher share of immigrants in a municipality led to increased farm values, which they attribute to more intense land cultivation. Despite the growing evidence linking past immigrants' human capital to present outcomes, particularly through human capital accumulation, we still know little about the impact of immigration on the transmission of political preferences to the local population in countries with a long history of limited free and fair elections.

4 Mechanisms Linking Migration and Political Preferences

This section examines how immigration may have influenced political preferences in São Paulo. The most evident mechanism for this influence is likely the state's fast urbanization and industrialization.[10] São Paulo experienced rapid industrial growth between 1907 and 1920, with the number of workers in the industry increasing by 10.7 percent annually, compared to 4.5 percent in the rest of Brazil (Versiani, 1993).[11] While the presence of foreign workers in São Paulo's industry was minimal in 1872, the number of immigrants substantially increased in the following years, with an annual growth rate exceeding 10 percent. By the turn of the century, nearly 60 percent of industrial workers were first-generation immigrants (Versiani, 1993; Merrick and Graham, 1979).

Some of these immigrants did have experience as industrial workers acquired in their country of origin. Notably, many Italians emigrated from northern regions, particularly the Veneto region, noted for its industrial activity.[12] This suggests that immigrants were more likely to possess, if not direct industrial experience, a greater familiarity with factory production environments than the Brazilian rural workers (Versiani, 1993). Indeed, Leff (1968) demonstrates that immigrants had superior educational, skill, and industrial experience compared to Brazilian workers during the 1929-1964 period, and Dean (1969) shows that immigrants and their children represented an overwhelming fraction of the proprietors of industrial and commercial firms in São Paulo.

The overwhelming presence of immigrants in the manufacturing sector derives from an elastic

[10] Industrialization is often linked to increased support for left-wing parties, which frequently represent the interests of the working class (Albanese and de Blasio, 2021).

[11] By 1920, São Paulo accounted for 33 percent of the total industrial production value in Brazil (Versiani, 1993).

[12] The composition of Italian immigrants varied over time, with distinct patterns in different waves of migration. In the first wave between 1876 and 1900, around three-quarters of the immigrants were from the Northern regions of Italy. However, in the subsequent wave from 1901 to 1913, the number of Southern Italians surpassed that of Northern Italians, with Southern accounting for twice as many immigrants during this period (Merrick and Graham, 1979, p. 95).

labor supply, a consequence of the imbalance between the arrivals of immigrant workers and the demands of the coffee plantations (Versiani, 1993). Policymakers strategically designed immigration subsidies to increase the supply of foreign labor, primarily to provide a cheap workforce for the coffee plantations (Hall, 1969, p. 116). This surplus labor was highly mobile, with workers transitioning between rural and urban regions and from agricultural to industrial jobs. Without this flexibility, the coffee farms would not have continued to attract a large inflow of immigrants (Holloway, 1980, p. 107).

São Paulo also witnessed a surge in organized labor activity between 1900 and 1920, culminating in the significant general strike of 1917. Immigrant workers, particularly those from urban areas, played a pivotal role in these labor movements, often invested with European socialist and anarchist ideals (Baily, 1969; Maram, 1977; Fausto, 1976).[13] Prior experience with socialist movements and social welfare reforms in their home countries likely contributed to the mobilization of these immigrants (Gabaccia, 1994; Bandiera et al., 2019). Regardless of their rural or urban origin, poor foreign workers were primarily motivated by a desire for upward social mobility through individual achievement (Cardoso, 1962).

In sum, immigration policies stimulated a significant inflow of foreign labor to São Paulo. While initially intended to support the coffee sector, the surplus of immigrants contributed to the expansion of São Paulo's industrial base in urban areas. Excluded from the political process, first and second-generation immigrants constituted a substantial fraction of the manufacturing workforce and played a pivotal role in the nascent labor movement. The subsequent shift towards democratic elections in the 1950s coincided with rapid industrialization and urbanization in São Paulo, leading to a political landscape responsive to the interests of urban voters, including labor, public services, and urban planning.

5 Data

Our analysis uses a combination of historical records, including population censuses and election results, spanning various periods in São Paulo's history. This section describes the main data sources and presents some descriptive statistics. The sample consists of 202 municipalities, according to the 1920 administrative boundaries. To account for historical changes in municipal

[13] Brazilian historiography has overemphasized the role of anarchists within the labor movement during the First Republic. In reality, other groups, including syndicalists, socialists, and Catholics, were more prominent and active as the labor movement strengthened in the 1920s (Pinheiro and Hall, 1979; da Costa, 1982).

boundaries, we harmonized all variables to correspond with these historical limits. We provide a detailed description of the data and the adjustment process in the Online Appendix B1.

5.1 Inflow of European Immigrants

We calculate the share of European immigrants in each municipality using data from the 1920 Demographic Census. Information on the annual inflow of European immigrants arriving through the *Hospedaria dos Imigrantes* between 1898 and 1920 comes from the *Anuário Estatístico do Estado de São Paulo*. The data includes immigrant nationality and their assigned destination municipality under yearly contracts but lacks demographic details.[14] To determine the year each municipality connected to the railway network, we use historical data on railway expansion from the website *Estações Ferroviárias do Brasil (EFB)*. Specifically, we identify the year the first railway station was constructed in each municipality to establish the date of the railway connection. This information allows us to calculate the number of years that a municipality had been connected to the railway network by 1920.

5.2 Additional Data

Political outcomes. Our primary outcomes of interest are the vote shares for the presidential and vice-presidential elections in 1955 and 1960 at the municipality level. To construct these outcomes, we digitized data from the seven-volume collection published by the Superior Electoral Court (TSE) between 1945 and 1965 (TSE, 1963).[15] We adopt the classification proposed by Nicolau (2004) to identify candidates affiliated with either labor or conservative political parties during this period. We also add data from TSE to measure political preferences during the 1989-2022 presidential elections. Following Ogeda et al. (2024), we categorize all political parties that participated in at least one presidential election into left-wing and non-left-wing parties. Left-wing parties are identified as communist, socialist, or left-wing based on their official sources. To these outcomes, we also add other variables from the population census, such as the share of urban population, the literacy rate, and the share of workers in manufacturing.

[14] We thank André Lanza for kindly sharing the data with us. For detailed information on data construction, please refer to Lanza (2021).

[15] Nicolau (2022) uses these data to provide a qualitatively analysis of the 1960 presidential elections.

Control variables. We construct key demographic characteristics of the municipalities for the period before the inflow of immigrants to the state of São Paulo using data from the 1872 Demographic Census. These characteristics include the logarithm of population density, the share of slaves in the population, the literacy rate, the share of free school-age children attending school, and the share of employment in non-agriculture activities. The controls for geographic characteristics include quadratic terms for latitude and longitude of municipal centroids, elevation, the logarithm of the municipality area, the potential yields for coffee, cotton, and sugarcane, soil composition proportions (latosols, acrisols, and *terra roxa*), and an indicator for the presence of a main river. We provide detailed descriptions of the data and sources in the Online Appendix B1.

5.3 Summary Statistics

Table 1 presents summary statistics for the main variables in our empirical analysis. Panel A reports descriptive statistics for the share of Europeans in the total population, railroads' presence within municipalities, and the number of years each municipality was connected to the railroad network by 1920. Between 1872 and 1920, the average share of Europeans for the municipalities in our sample increased by 10.6 percentage points, from 0.9 to 11.5 percent. Notably, there is considerable variation in historical immigration exposure across municipalities.[16] In 1920, this share ranged from 0 to 33.8 percent. Figure 3 provides a map of São Paulo depicting the geographic distribution of the European population share in 1920. Panel A also reveals a significant increase in the fraction of municipalities connected to the railroad network between 1872 and 1920. Just before the large inflow of immigrants, only 3.5 percent of municipalities were connected to the railway network, compared to 74.3 percent in 1920 (see Online Appendix Figure A3).

Panel B of Table 1 summarizes the electoral outcomes. It is worth noting that the average vote share of João Goulart, a labor politician affiliated with PTB, increased by 12.9 percentage points between 1955 and 1960. Conversely, Adhemar de Barros, the populist PSP candidate who appealed to the urban working class, experienced a decline in his average vote share from 42.7 to 30.4 percent. Finally, our control variables are summarized in Panel C. Remarkably, the average share of workers in manufacturing was just 6.6 percent in 1872, and the average literacy rate was only 17.9 percent. The predominant soil type is latosol in 50.7 percent of the municipalities. Of particular importance was *terra roxa*, a highly fertile variant of latosol covering 34.3 percent of the

[16] In Online Appendix Figure A2, we present the histogram of the share of Europeans in 1920.

sample that played a crucial role in driving coffee expansion.

6 Empirical Strategy

In this section, we present our main empirical specification to investigate the relationship between historical immigration and the political preferences of the municipalities in São Paulo. To quantify this relationship, we estimate the following equation:

$$y_m = \beta_0 + \beta_1 EuroShare_{m,1920} + X'_m\gamma + \varepsilon_m, \tag{1}$$

where y_m represents an outcome of interest (e.g., the vote share of a specific candidate) for municipality m. The variable $EuroShare_{m,1920}$ denotes the share of European immigrants in municipality m in 1920, and X'_m is a vector of control variables at the municipality level, which we describe below. For our baseline estimates, we report standard errors robust to heteroskedasticity; however, our results are robust to alternative inference methods.

We are interested in the parameter β_1, which represents the average effect of changes in the share of European immigrants on our outcomes of interest. For this coefficient to have a meaningful interpretation, it is essential to control for all determinants of political preferences that correlate with the immigrants' destination choices.[17] Online Appendix Table A1 presents the correlates between the share of European immigrants in 1920 and various socio-economic and geographic characteristics.[18] On average, municipalities that attracted more immigrants tended to be less populated, had an intense use of slaves, and had a more significant share of the population working in non-agriculture activities in 1872. Immigration is also associated with higher literacy rates and longer railway access, historically the primary mode of transportation for immigrants. Finally, we find a strong correlation between immigration and geographic characteristics suitable for coffee production.

To address endogeneity concerns, we incorporate several covariates in our main specifications. First, we include the following historical parish-level characteristics in 1872: log population density, share of slaves, literacy rate, share of free school-age children in school, and share of non-agricultural employment.[19] Geographic controls include quadratic polynomial in the latitude and

[17] Lanza et al. (2023) argue that immigrants were randomly allocated to farms by the subsidization program, which mitigates some endogeneity concerns with our OLS estimates.

[18] We report the standardized beta coefficients.

[19] We use parish data instead of the more aggregated municipality data to increase variability. For municipalities that

longitude of municipal centroids and their interaction, elevation, log municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and main river indicator. As a robustness check, we further control for the number of years that a municipality had been connected to the rail network by 1920 and for land inequality.

The identification strategy assumes that, after controlling for geographic and baseline socioeconomic conditions, the distribution of immigrants across municipalities is independent of unobserved factors that influence the outcome variable. However, this assumption is not guaranteed. Potential unobserved confounders, such as the political power of local agriculture elites, might simultaneously influence immigrant settlement patterns and long-term political preferences. To address potential endogeneity, we employ an instrumental variable strategy based on the interaction of immigrant inflows and the expansion of São Paulo's railway network, building on Sequeira et al. (2020). The intuition is that municipalities connected to the railway just before a surge in immigration were more likely to attract migrants from that wave compared to those linked afterward. This approach leverages the timing of railway expansion and fluctuations in immigrant flows, driven by changes in migratory legislation, conflicts, and droughts in source countries, to induce exogenous variation in immigration patterns.[20]

6.1 Instrument for Historical Immigration

Zero-stage estimates. To construct our instrument, we employ a two-step approach. Initially, we estimate the following zero-stage equation using yearly data for immigrant flows at the municipality level:

$$ImmShare_{mt} = \alpha_0 + \beta(ImmFlow_t \times Railway_{mt}) + \delta Railway_{mt} + \lambda_m + \gamma_t + \varepsilon_{mt}, \qquad (2)$$

where $ImmShare_{mt}$ represents the share of immigrants in municipality m in year t from 1882 to 1920, calculated as the number of immigrant arrivals divided by the 1890 municipal population. $ImmFlow_t$ denotes the total number of European immigrants arriving in the state of São Paulo in year t, normalized by the 1890 state population, and $Railway_{mt}$ is an indicator variable equal to one if municipality m had railway access in year t. It captures the estimated effect of

did not originate from a parish, we assign the 1872 values of the municipality from which they originated. See Online Appendix B1 for further details.

[20] In São Paulo, the expansion of the coffee frontier and immigrant settlement closely followed the expansion of the railway network from the east to the west.

railway access on immigrant settlement in years with zero immigrant inflow to São Paulo. λ_m and γ_t represent municipality and year fixed effects, respectively. Our interest relies on the parameter β associated with the interaction term between the aggregate flow of immigrants to São Paulo and whether a municipality was connected to the railway network. This coefficient captures the differential impact of railway access on immigrant settlement during periods of high and low aggregate immigration. We expect a positive estimate for β. Robust standard errors are clustered by municipality based on the 1920 administrative division.

Column 1 of Table 2 presents the estimates for the specification in Equation (2). The coefficient for the interaction term between railway access and aggregate immigrant inflow is positive and statistically significant, indicating that railway access significantly influenced immigrant settlement.[21] Notably, the estimated coefficient for the railway access indicator is close to zero, suggesting no impact of railway access in the absence of immigrant inflow. As a robustness check, we re-estimate Equation (2) excluding municipalities from the Baixa Sorocabana, Santos, and Capital coffee zones. As noted by Lanza et al. (2023), Baixa Sorocabana and Santos had minimal coffee production and immigrant movement, while the Capital region, encompassing the area around São Paulo city, differed from the typical immigrant experience by primarily offering urban jobs to immigrants. Excluding these municipalities yields nearly identical results, as shown in columns 2 to 5 of Table 2.

To construct our instrument, we use the interaction term from the zero-stage equation to predict the immigrant share in each municipality as follows:

$$\widehat{ImmShare}_m = \frac{1}{T_m} \sum_{t=1882}^{1920} \hat{\beta}(ImmigFlow_t \times Railway_{mt}), \tag{3}$$

where $\hat{\beta}$ is the estimate of β from Equation (2) and T_m represents the number of years that municipality m had been connected to the rail network by 1920. This approach ensures that the resulting variation is unlikely to be correlated with factors influencing medium and long-run political outcomes beyond fluctuations in immigration flows and railway conectivity.[22] Figure 4a reports the geographic expansion of São Paulo's railway network over time, and Figure 4b presents the pre-

[21] Note that the variable $ImmFlow_t$ is absorbed by the year fixed effects and is therefore omitted from the equation.

[22] As noted by Sequeira et al. (2020), the zero-stage equation provides valuable insights into the instrument's mechanism and plausibility, but it is not strictly necessary since it simply scales $\frac{1}{T_m} \sum_{t=1882}^{1920} ImmigFlow_t \times Railway_{mt}$ by a constant.

dicted share of European residents across the state, based on our instrumental variable.

Two-stage least square and identification. Our 2SLS model consists of the following first-stage (4) and second-stage (5) equations:

$$EuroShare_{m,1920} = \gamma_0 + \gamma_1 \widehat{ImmShare}_m + X'_m\phi + \epsilon_m \tag{4}$$

$$y_m = \delta_0 + \delta_1 \widehat{EuroShare}_{m,1920} + X'_m\mu + \nu_m, \tag{5}$$

where y_m represents an outcome of interest (e.g., vote share for each candidate in 1955 or 1960 elections). $EuroShare_{m,1920}$ denotes the share of European immigrants in municipality m in 1920, while $\widehat{ImmShare}_m$ represents the predicted immigrant share described above. The vector X'_m of control variables at the municipality level includes the previously specified geographic and demographic characteristics.

A potential threat to the exclusion restriction arises from the possibility that early or late railway connectivity might directly influence long-term political preferences or attract different immigrant populations. To check the robustness of our main findings, we control for the number of years a municipality had been connected to the railway network by 1920. Given the distinct characteristics of the Capital, Baixa Sorocabana, and Santos coffee zones, we conduct additional robustness checks by re-estimating all our models, excluding municipalities from these regions.

Table 3 presents the first-stage results. The baseline estimate using the full sample, reported in column 1, reveals a strong correlation between the predicted and actual share of Europeans, with a Kleibergen-Paap F-statistic of approximately 54. The point estimate suggests a 5 percentage point increase in the actual average immigrant share for every one percentage point rise in the predicted immigrant share. The results are robust to excluding municipalities from the Capital, Baixa Sorocabana, and Santos coffee zones (columns 2-5). Column 6 introduces the number of years a municipality had railway access by 1920 as an additional control. The positive and significant coefficient on this variable indicates that municipalities with earlier railway connections tend to have higher predicted immigrant shares. Although the IV estimate slightly decreases, the first-stage relationship remains robust with a Kleibergen-Paap F-statistic around 18. Online Appendix Figures A4a and A4b provide the graphical analogue of the first-stage relationship, both with and without the railway connection covariate.

7 Main Results

Electoral outcomes in 1955. Table 4 presents the estimated effects of immigration on 1955 political outcomes. Panel A reports OLS estimates based on Equation (1), while Panel B shows reduced form estimates and Panel C presents 2SLS estimates from Equation (5). The 2SLS results indicate that municipalities with a larger share of European immigrants in 1920 exhibited higher support for labor candidates Kubitschek (PSD) and Goulart (PTB) in 1955 (columns 2 and 5, Panel C). A one standard deviation increase in historical immigration share (0.090, or 9.0%) is associated with a 6.55 percent points (pp) increase in vote share for Kubitschek (0.728 $\times$ 0.090) and a 10.24 pp increase for Goulart (1.138 $\times$ 0.090). These results coincide with a decrease in the vote share for the conservative candidate Milton Campos from UDN (column 7) of approximately 3.94 pp (-0.438 $\times$ 0.090). However, this point estimate is not statistically significant at conventional levels.

Kubitschek and Goulart were the elected candidates in the 1955 elections. While not explicitly populist, they were close to the legacy of former President Getúlio Vargas. Their political platforms resonated with the urban working class, particularly in the case of Goulart. Interestingly, our analysis does not reveal a significant association between immigration and support for the populist candidate Adhemar de Barros. There appears to be a negative relationship. Despite Barros prominent role in São Paulo's political landscape and initial attempts to appeal to the urban working class, competition from the PTB and his ambiguous rhetoric that tried to please the working class and conservatives might have undermined his electoral performance (Sampaio, 1982, p. 109-111).

Electoral outcomes in 1960. We also examine the impact of historical immigration on electoral outcomes in 1960. Our results indicate a positive association between the presence of European immigrants and support for labor candidates. Panel C of Table 5 presents the 2SLS estimates from Equation (5). Columns 2 and 4 show a positive effect of immigration on vote shares for labor candidates Henrique Lott and João Goulart. Specifically, a one standard deviation increase in historical immigration (0.090) is associated with a 4.53 pp increase in Lott's vote share (0.504 $\times$ 0.090) and a 7.0 pp increase for Goulart (0.779 $\times$ 0.090). Conversely, municipalities with higher shares of European immigrants exhibited lower support for the conservative candidate Jânio Quadros (column 3). A one standard deviation increase in the share of European immigrants is associated with a 5.94 pp decrease in Quadros' vote share (-0.661 $\times$ 0.090), or by almost 11.55 percent to its mean–a sizable effect.

Quadros was a conservative politician supported by the UDN, known for opposing the political legacy of Getúlio Vargas. His campaign promises focused on reducing government spending and promoting moral reform within the Brazilian administration. One of his biggest political rivals was Adhemar de Barros, and together, they received approximately 80 percent of the votes in São Paulo in the 1960 elections. In contrast, Lott represented the PSD, the party of former President Kubitschek, and received support from labor parties, including the PTB. While lacking the same political experience and charisma as his opponents, he defended several nationalist policies, such as extending voting rights to illiterates and imposing restrictions on profit remittances by foreign companies abroad (Skidmore, 1982, p. 234). It is worth noting that the coefficient estimated for the candidate João Goulart is slightly smaller than that estimated for the 1955 election. Notably, in 1960, Goulart faced a strong competitor in Fernando Ferrari, who had broken with the PTB and attracted many left-wing voters (Skidmore, 1982, p. 238).

Differences between OLS and 2SLS. A potential concern is that our findings might overestimate the impact of immigration on electoral outcomes due to a disproportionate settlement of immigrants in areas with pre-existing left-wing sympathies. However, comparing OLS and 2SLS estimates in Tables 4 and 5 indicates the opposite pattern: the relationship between historical immigrant share and 1950s electoral outcomes is weaker in OLS models than in 2SLS models. This suggests that our estimates might be biased downward rather than upward. Although direct measures of native-born ideology at the municipal level are unavailable, historical evidence suggests a settlement pattern not based on political preferences.

First, immigrants often ended up in economically disadvantaged areas dominated by powerful landowners with significant control over citizens, resulting in highly manipulated elections (Leal, 2012). Second, immigrants had limited information about potential destinations before moving to São Paulo. Immigrants participating in the official agricultural program were recruited in Europe, processed through a controlled system in Santos and São Paulo, and then dispatched to farms across the state through the railway network. With subsidized transportation and employment contracts, immigrants had little say in their final destination. This lack of choice was exacerbated by the short period of time that immigrants stayed at the hostel, where they were often forced to accept available jobs based on immediate labor demands (Lanza et al., 2023).

8 Mechanisms

We now explore the mechanisms through which historical immigration influenced left-leaning political preferences in the 1950s.

Industrialization. As discussed in Section 4, immigrants played a pivotal role in São Paulo's early industrialization. Table 6 provides empirical evidence supporting this claim, demonstrating that municipalities with larger European immigrant populations in 1920 exhibited a higher share of manufacturing employment between 1920 and 1960. Based on the 2SLS estimates in Panel C of Table 6, a one standard deviation increase in historical immigration share is associated with a 6.01 pp increase in the share of workers employed in manufacturing in 1920 (0.668×0.090) and a 7.29 pp increase in 1960 (0.810×0.090). These results are consistent with previous research documenting that municipalities with state-sponsored settlements exhibited higher income per capita and a shift towards skill-intensive occupations (Rocha et al., 2017).

Urbanization. The rapid population growth in São Paulo during the late nineteenth and early twentieth centuries coincided with an intense urbanization process driven by the inflow of European immigrants. Columns 1, 2, and 3 of Table 7 show that municipalities with larger immigrant populations in 1920 experienced higher urbanization rates between 1940 and 1960. The 2SLS estimates in Panel C of Table 7 suggest that a one standard deviation increase in the share of immigrants is associated with a 16.06 pp increase in urbanization rate in 1940 (1.784×0.090) and a 22.07 pp increase in 1960 (2.452×0.090). While specific data is unavailable, it is likely that the expansion of the urban population, driven by immigration, intensified demands for improved labor conditions. This development contributed to the growth of the labor movement, with many union leaders playing a role in the formation of left-wing parties in the 1950s (Colistete, 2007).

Human capital. Another plausible explanation for the link between immigration and support for labor parties is the positive effect of immigration on human capital. Historical evidence suggests that immigrants brought a relatively more educated workforce, potentially facilitating knowledge diffusion within the local community (Leff, 1968; Rocha et al., 2017). Columns 4 and 5 of Table 7 show a significant positive impact of immigration on literacy rates in 1920 and 1940. Specifically, a one standard deviation increase in historical immigration is associated with a 10.49 pp increase in literacy rates in 1920 (1.166×0.090) and a 10.54 pp increase in 1940 (1.171×0.090).

These results align with broader trends observed by Gethin et al. (2022), who document a growing correlation between higher education levels and left-wing political preferences across 21 Western democracies from 1948 to 2020.

9 Robustness Checks

In this section, we check the robustness of our main findings.

Railway connection. A primary concern with our baseline specification is that early connection to the railway network might independently influence our outcomes of interest. To account for any potential relationship between our instrument and the timing of a municipality's railway connection, we include the number of years a municipality had been connected to the railway network by 1920 as an additional control. Online Appendix Tables A2 and A3 present OLS (Panel A), reduced form (Panel B), 2SLS (Panel C), and first-stage (Panel D) estimates. Despite a slight decrease in the Kleibergen-Paap F-statistic compared to the baseline model, it remains well above the weak instrument threshold. The inclusion of the additional control variable reinforces the robustness of our findings. While point estimates align closely with the baseline model, standard errors are considerably higher.

As an additional robustness check, we exclude municipalities that obtained a railway station during the first three decades of the rail network expansion in the nineteenth century. It is possible that these early-connected municipalities were systematically different from those connected later in ways that our controls cannot fully capture. Table A4 presents the 2SLS estimates for the electoral results in 1955 (Panel A) and 1960 (Panel B). Our main results remain robust even when we limit the analysis to this smaller sample.

Industrialization and Urbanization. Following the Great Depression, São Paulo's industrial sector experienced remarkable growth, with the number of factories doubling and the workforce expanding by over 50 percent within a few years (Suzigan, 1971). This rapid industrialization was closely associated with the expansion of urbanization in the state. To ensure that these factors are not driving the results, we include additional controls in our baseline model. Specifically, we account for the share of workers in manufacturing and the urbanization rate in 1940. These controls are essential for isolating the direct effects of industrialization and urbanization on political prefer-

ences. Previous studies, such as Albanese and de Blasio (2021), have shown that industrialization can increase support for left-wing parties, typically aligned with working-class interests. Online Appendix Table A5 shows that including these controls does not change our results.

Nevertheless, industrialization and urbanization rates may act as 'bad controls' as they are outcome variables and could bias the relationship between immigration and electoral outcomes. To address this concern, we conduct a robustness check in Online Appendix Table A6, where we estimate the specification from Equation (5), restricting the sample to municipalities below the median of the distribution of the industrialization rate in 1940. The results remain consistent with our baseline estimates. Similarly, Online Appendix Table A7 presents the results of restricting the sample to municipalities below the median urbanization rate in 1940. The findings are qualitatively similar, reinforcing the conclusion that immigrants played a critical role in shaping political preferences in São Paulo during the 1950s.[23]

Excluding coffee zones. As discussed in Section 3, the westward expansion of coffee plantations in São Paulo played a crucial role in attracting European immigrants at the end of the nineteenth and the beginning of the twentieth centuries. Colistete (2015) notes the distinct geographic distribution of coffee cultivation across the state, with regions like Mogiana, Araraquarense, Paulista, and Alta Sorocabana dedicating over half their land to coffee production. Conversely, Baixa Sorocabana, Santos, and the Capital zones had minimal coffee cultivation. Additionally, some of these regions attracted few immigrants. For instance, Santos and Baixa Sorocabana accounted for barely 1.5 percent of the immigrants between 1882 and 1920, while the Capital region attracted immigrants who were more likely to perform urban jobs (Lanza et al., 2023). In Online Appendix Table A8, we exclude Baixa Sorocabana, Santos, and the Capital zones from our sample and show that our results are not driven by these differences.

State-sponsored settlements. To further assess the robustness of our results, we exclude municipalities with state-sponsored immigrant colonies from our sample. These settlements were established through partnerships between private coffee planters and the state government in economically unfavorable locations and have been linked to faster economic development due to greater human capital accumulation (Cameron, 1931; Rocha et al., 2017). Given the unique developmental history of these places, the evolution of political preferences in these regions could have been

[23] In a complementary analysis (available upon request), our results remain robust when controlling for the literacy rate in 1940 and restricting the sample to municipalities below the median literacy rate in 1940.

influenced by factors other than immigration. Online Appendix Table A9 demonstrates that our main findings remain unchanged when excluding these municipalities from our sample.

Land inequality. Literature emphasizes the crucial role of land inequality in shaping long-term development (Engerman and Sokoloff, 1994; Galor et al., 2009). Regions close to German colonies in Rio Grande do Sul exhibit lower inequality and higher education levels today, explained largely by the more egalitarian land distribution (de Carvalho Filho and Monasterio, 2012). To determine whether our findings are driven by differences in the agrarian structure rather than the presence of immigrants, we include land inequality in 1920 as an additional control.[24] The findings are robust to the inclusion of this additional control (Online Appendix Table A10).

Inference. For the baseline estimates, we use heteroskedasticity-robust standard errors. A significant challenge when using historical data is the splitting of municipalities over time. To address this concern, we cluster our standard errors on the municipalities that existed in 1872. Additionally, we account for cross-sectional dependence due to geographic proximity by using Conley (1999) standard errors with a uniform kernel and cutoffs of 25, 50, 75, and 100 km. Online Appendix Table A11 shows that our results remain robust across these alternative inference methods.

10 Additional Results

Having established the influence of immigration on political outcomes in the medium term, we now turn to the long run by examining the effects in the first rounds of the presidential elections after the re-democratization in 1985. During this period, Brazilian politics became significantly more competitive, with a large number of parties competing in both local and national elections. This analysis is a first attempt to test whether political preferences persist in an environment where people cannot freely express their preferences through voting. Table 8 presents the OLS (Panel A), reduced form (Panel B), and 2SLS (Panel C) estimates obtained from regressions based on the specification in Equation (5). The dependent variables are the vote shares of left-wing parties in each election from 1989 to 2022.

The 1989 elections marked the first time since 1960 that eligible Brazilian citizens could vote for their president. Due to the relatively new nature of the political parties, mobilization was

[24] We compute the standard land Gini coefficient following Nunn (2008)'s methodology.

limited, resulting in the emergence of twenty-two presidential candidacies. Consistent with our earlier findings, the estimated effects of immigration on the vote share of left-wing candidates persist in the long run. Specifically, our point estimates suggest that a one standard deviation increase in historical immigration share is associated with an 5.05 pp increase (0.561×0.090) in the vote share of left-wing parties in the 1989 elections. Similar magnitudes are observed from 1994 to 2002, with all estimates being statistically significant at conventional levels. From 2006 onwards, the coefficients are mixed and not statistically significant. These findings are intriguing as they may reflect public dissatisfaction with the main left-wing party, the Workers' Party, possibly due to corruption scandals and economic crises during its time in power.

11 Conclusion

The emergence of the urban working class marked a significant political shift in Latin America during the postwar period. In Brazil, for the first time in history, the urban masses played a crucial role in the democratic period beginning in 1945, which witnessed the rise of populist politicians appealing to mass-based policies in a context of large polarization between conservatives and left-leaning labor ideologies. An understudied question in this period is whether European immigration during the Age of Mass Migration contributed to increasing the electoral competition. São Paulo, as Brazil's most populous and industrialized state, is an interesting context to study these issues.

Most European immigrants between 1889 and 1930 settled in the state of São Paulo, where the rapidly expanding coffee agriculture was replacing slavery with free labor. This movement played a fundamental role in the growth of cities. Moreover, a notable expansion of electoral participation in the postwar period accompanied the intensification of the urbanization process. Historically a conservative state, our findings indicate that in municipalities where immigrant populations were more concentrated, there was a notable shift toward labor-oriented, left-leaning candidates in the 1955 and 1960 presidential elections. This phenomenon suggests that immigrant communities, particularly those integrated into the urban working class, played a role in challenging the conservative dominance in São Paulo's political landscape.

Like many other Latin American countries, Brazil became a battleground for ideological conflicts between leftist movements and conservative forces supported by the elites and military. Our findings suggest that the support for labor candidates in regions with significant immigration inflows accelerated urbanization and industrialization in São Paulo and contributed to increased polit-

ical polarization, mirroring broader global tensions between labor movements and anti-communist groups. This polarization ultimately culminated in the 1964 military coup in Brazil. Interestingly, we provide suggestive evidence that political preferences persisted even after the end of the military dictatorship and the restoration of free elections in 1989. Yet, further research is needed to understand the mechanisms linking these persistent political preferences.

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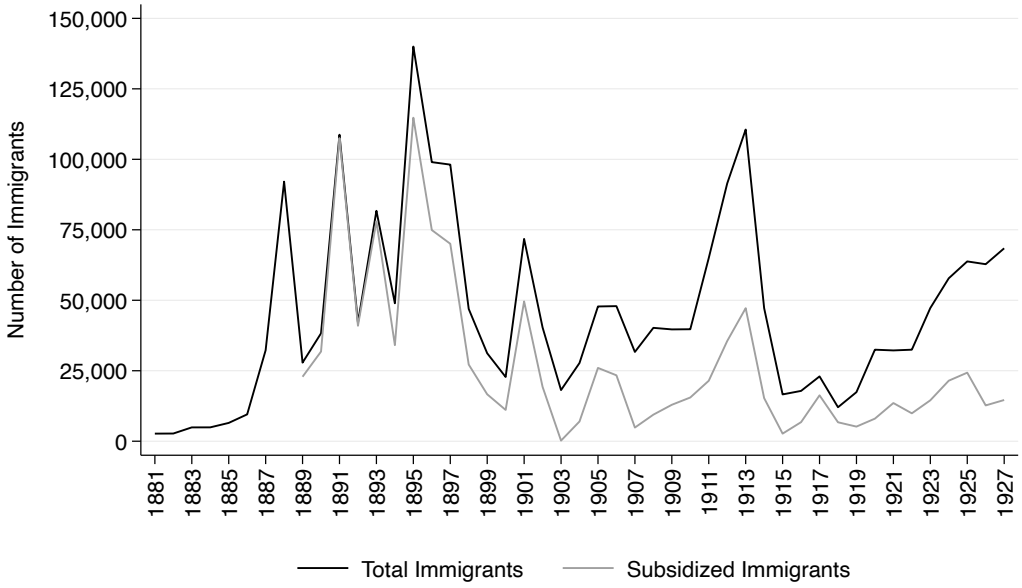
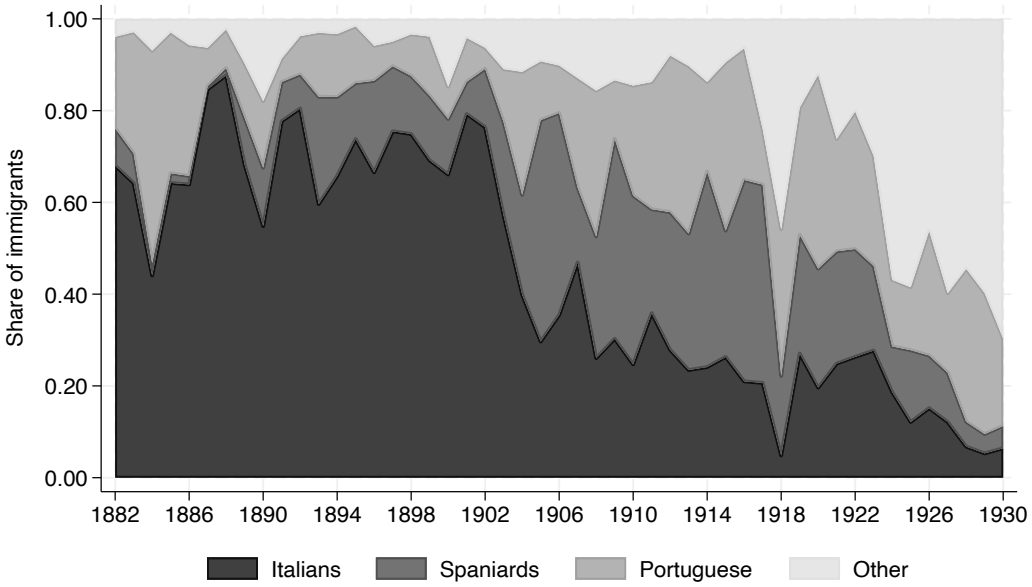
Figures

Figure 1: Annual Arrival of Immigrants to the State of São Paulo, 1881-1927



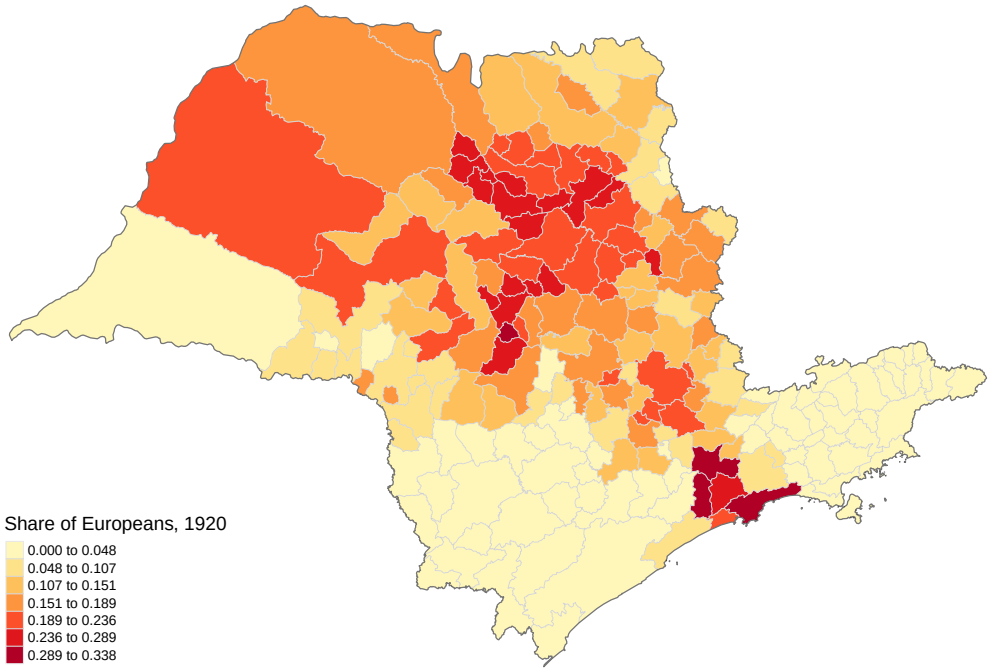
Notes: This figure presents the annual arrival of immigrants to the state of São Paulo between 1881 and 1927. Source: Relatório da Secretaria da Agricultura do Estado de São Paulo.

Figure 2: Distribution of Immigrant Inflows to São Paulo by Country of Origin, 1882-1930



Notes: This figure presents the share of immigration to São Paulo from each country of origin between 1882 and 1930. Source: Relatório da Secretaria da Agricultura do Estado de São Paulo.

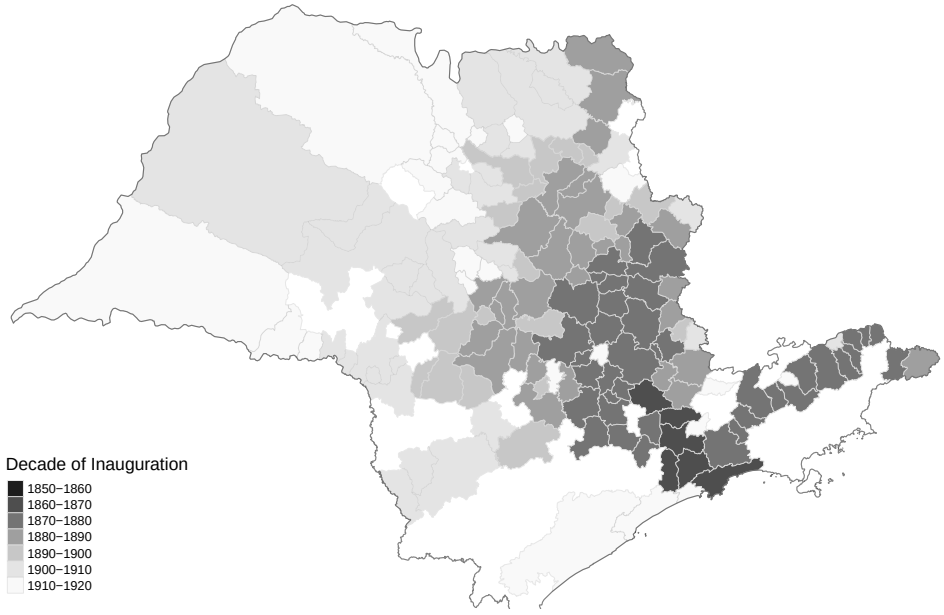
Figure 3: Share of Europeans in 1920



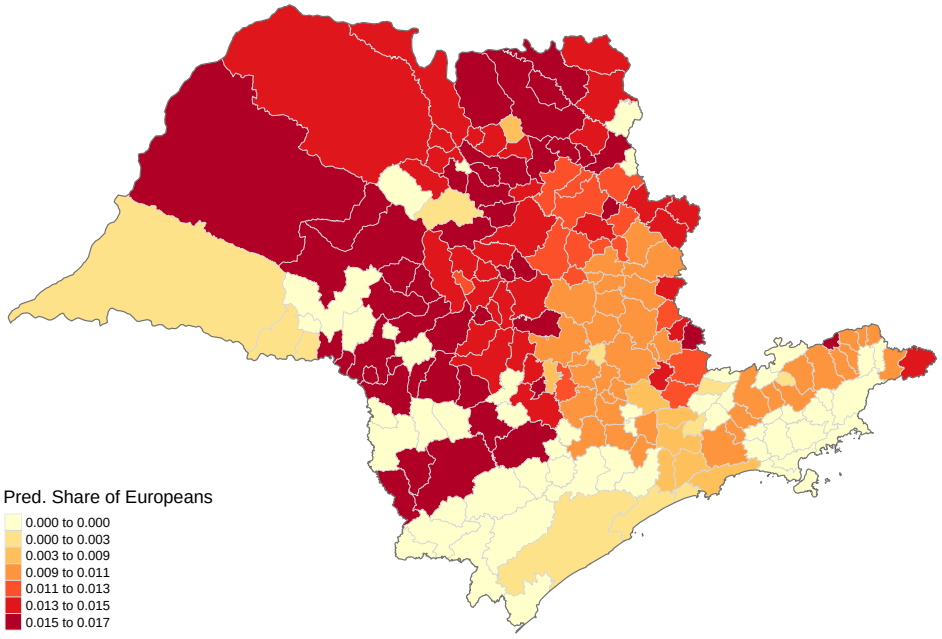
Notes: This map presents the geographic distribution of the share of Europeans across municipalities in the state of São Paulo in 1920. Darker shades represent a higher presence of Europeans.

Figure 4: Spatial Distribution of the Railway Stations and the Instrument

(a) São Paulos's Railway Network, 1850-1920



(b) Predicted Share of Europeans



Notes: Map 4a presents the spatial distribution of the railway stations across São Paulo's municipalities by the decade of inauguration. Darker shades represent municipalities that were connected to the railway network earlier. Map 4b depicts the geographic distribution of the instrumental variable, calculated using Equation (3). Darker shades indicate a higher predicted share of European immigrants.

Tables

Table 1: Summary Statistics

Notes: This table presents descriptive statistics for our sample of municipalities. Panel A details demographic characteristics, including our primary variable of interest: the share of Europeans in 1920. Panel B reports the vote share for each candidate in the 1955 and 1960 elections, categorized by their political ideology. Panel C provides data on geographic and socio-economic controls used in our baseline estimates.

Table 2: Zero-Stage Estimates

	Dep. var.: Immigrant share of total municipality population				
		Excluding observations from coffee zones			
	All	Capital	Baixa Sorocabana	Santos	Capital, Baixa Sorocabana, Santos
	(1)	(2)	(3)	(4)	(5)
Immigrant Inflow × Railway	1.120***	1.134***	1.131***	1.131***	1.159***
	[0.182]	[0.188]	[0.184]	[0.184]	[0.193]
Railway	0.002	0.002	0.002	0.002	0.002
	[0.002]	[0.003]	[0.003]	[0.003]	[0.003]
Observations	7,878	7,644	7,371	7,683	6,942
R-squared (within)	0.106	0.108	0.102	0.106	0.102
Year FE	Yes	Yes	Yes	Yes	Yes
Municipality FE	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the OLS estimates from the zero-stage regressions specified in Equation (2). The dependent variable is the share of European immigrants in municipality m in year $t \in \{1882, ..., 1920\}$, calculated as the number of immigrant arrivals divided by the 1890 municipal population. $Railway_{mt}$ is an indicator equal to one if municipality m had railway access in year t. Robust standard errors are clustered at the 1920 administrative division level. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 3: First-Stage Estimates

	Dependent variable: share of European immigrants in 1920					
	(1)	(2)	(3)	(4)	(5)	(6)
	Baseline	Capital	Baixa Sorocabana	Santos	Capital, Baixa Sorocabana, Santos	Years connected
Pred. Share of Europeans	5.029***	4.745***	5.339***	4.804***	4.485***	3.739***
	[0.686]	[0.642]	[0.761]	[0.658]	[0.694]	[0.869]
Railway connection						0.001**
						[0.000]
KP F-stat	53.814	54.634	49.260	53.325	41.800	18.504
Observations	202	196	189	197	178	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table reports the first-stage estimates for the relationship between the predicted and actual share of Europeans, based on the specification in Equation (4). The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 4: Effects of Historical Immigration on Electoral Results in 1955

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. OLS estimates						
Share of Europeans, 1920	−0.313***	0.139	0.109	0.096	0.334***	−0.412***	0.030
	[0.105]	[0.094]	[0.143]	[0.086]	[0.121]	[0.113]	[0.118]
	Panel B. Reduced form						
Pred. Share of Europeans	−1.143	3.661***	−2.386	0.284	5.724***	−2.775**	−2.202*
	[1.330]	[0.960]	[1.692]	[0.939]	[1.050]	[1.290]	[1.332]
	Panel C. 2SLS estimates						
Share of Europeans, 1920	−0.227	0.728***	−0.474	0.056	1.138***	−0.552**	−0.438
	[0.244]	[0.202]	[0.334]	[0.176]	[0.244]	[0.237]	[0.267]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920						
Pred. Share of Europeans	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***
	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]
KP F-stat	53.814	53.814	53.814	53.814	53.814	53.814	53.814
Mean dep. var.	0.427	0.093	0.341	0.098	0.166	0.329	0.374
Observations	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table reports the estimated effects of European immigration on the electoral results of 1955. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates. The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 5: Effects of Historical Immigration on Electoral Results in 1960

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel A. OLS estimates					
Share of Europeans, 1920	−0.028	0.125	−0.056	0.161*	0.004	0.037
	[0.095]	[0.083]	[0.081]	[0.087]	[0.099]	[0.106]
	Panel B. Reduced form					
Pred. Share of Europeans	1.591	2.534***	−3.326***	3.916***	−1.235	−0.205
	[0.984]	[0.873]	[1.060]	[1.150]	[1.197]	[1.329]
	Panel C. 2SLS estimates					
Share of Europeans, 1920	0.316	0.504***	−0.661***	0.779***	−0.246	−0.041
	[0.197]	[0.168]	[0.223]	[0.233]	[0.227]	[0.250]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920					
Pred. Share of Europeans	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***
	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]
KP F-stat	53.814	53.814	53.814	53.814	53.814	53.814
Mean dep. var.	0.304	0.120	0.515	0.295	0.164	0.397
Observations	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table reports the estimated effects of European immigration on the electoral results of 1960. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates. The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 6: Effects of Historical Immigration on Industrialization, 1920-1960

	Dependent variable: Share of manufacturing employment			
	(1)	(2)	(3)	(4)
	1920	1940	1950	1960
	Panel A. OLS estimates			
Share of Europeans, 1920	0.520***	0.454***	0.189**	0.414***
	[0.085]	[0.154]	[0.095]	[0.139]
	Panel B. Reduced form			
Pred. Share of Europeans	3.360***	3.546***	2.097***	4.072***
	[0.700]	[1.213]	[0.675]	[1.101]
	Panel C. 2SLS estimates			
Share of Europeans, 1920	0.668***	0.705***	0.417***	0.810***
	[0.123]	[0.221]	[0.127]	[0.211]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920			
Pred. Share of Europeans	5.029***	5.029***	5.029***	5.029***
	[0.686]	[0.686]	[0.686]	[0.686]
KP F-stat	53.814	53.814	53.814	53.814
Mean dep. var.	0.089	0.083	0.081	0.139
Observations	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes

Notes: This table reports the estimated effects of European immigration on the share of workers in manufacturing between 1920 and 1960. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates. The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 7: Effects of Historical Immigration on Urbanization and Literacy Rate, 1920-1950

	Urbanization rate			Literacy rate	
	(1) 1940	(2) 1950	(3) 1960	(4) 1920	(5) 1940
	Panel A. OLS estimates				
Share of Europeans, 1920	1.190***	1.147***	1.260***	0.672***	0.593***
	[0.199]	[0.210]	[0.214]	[0.084]	[0.112]
	Panel B. Reduced form				
Pred. Share of Europeans	8.973***	10.751***	12.331***	5.866***	5.890***
	[1.813]	[2.067]	[2.219]	[0.916]	[1.020]
	Panel C. 2SLS estimates				
Share of Europeans, 1920	1.784***	2.138***	2.452***	1.166***	1.171***
	[0.324]	[0.403]	[0.437]	[0.157]	[0.204]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920				
Pred. Share of Europeans	5.029***	5.029***	5.029***	5.029***	5.029***
	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]
KP F-stat	53.814	53.814	53.814	53.814	53.814
Mean dep. var.	0.278	0.331	0.429	0.233	0.352
Observations	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes

Notes: This table reports the estimated effects of European immigration on the literacy rate and urbanization rate between 1920 and 1960. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates. The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table 8: Effects of Historical Immigration on Electoral Results, 1989-2022

	Dependent variable: Vote share for left-wing parties								
	(1) 1989	(2) 1994	(3) 1998	(4) 2002	(5) 2006	(6) 2010	(7) 2014	(8) 2018	(9) 2022
	Panel A. OLS estimates								
Share of Europeans, 1920	0.317***	0.326***	0.465***	0.414***	0.106	0.013	0.045	0.011	0.089
	[0.083]	[0.088]	[0.092]	[0.101]	[0.089]	[0.084]	[0.085]	[0.060]	[0.071]
	Panel B. Reduced form								
Pred. Share of Europeans	2.821***	3.197***	3.508***	3.589***	−0.122	−0.673	0.306	−1.494**	−0.405
	[0.707]	[0.766]	[1.033]	[1.140]	[0.994]	[0.933]	[0.986]	[0.728]	[0.776]
	Panel C. 2SLS estimates								
Share of Europeans, 1920	0.561***	0.636***	0.697***	0.714***	−0.024	−0.134	0.061	−0.297**	−0.081
	[0.148]	[0.155]	[0.190]	[0.211]	[0.187]	[0.175]	[0.186]	[0.142]	[0.147]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920								
Pred. Share of Europeans	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***	5.029***
	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]	[0.686]
KP F-stat	53.814	53.814	53.814	53.814	53.814	53.814	53.814	53.814	53.814
Mean dep. var.	0.155	0.210	0.332	0.666	0.382	0.526	0.483	0.227	0.394
Observations	202	202	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table reports the estimated effects of European immigration on the share of votes for left-wing parties between 1989 and 2022. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates. The geographic controls include a quadratic polynomial in latitude and longitude of municipal centroids, their interaction, elevation, the logarithm of municipality area, potential yields for coffee, cotton, and sugarcane, soil composition (latosols, acrisols, and terra roxa), and an indicator for the presence of a main river. The 1872 socioeconomic controls encompass the logarithm of population density, the share of slaves, literacy rate, the proportion of free school-age children attending school, and the share of non-agricultural employment. Railway connection is the number of years a municipality had been connected to the railway network by 1920. Robust standard errors are reported in square brackets. $^{*}\ p < 0.1$, $^{**}\ p < 0.05$, $^{***}\ p < 0.01$.

ONLINE APPENDIX

(NOT FOR PUBLICATION)

How Immigration Shapes Politicis: Populism, Labor Movements, and Political Preferences in Brazil

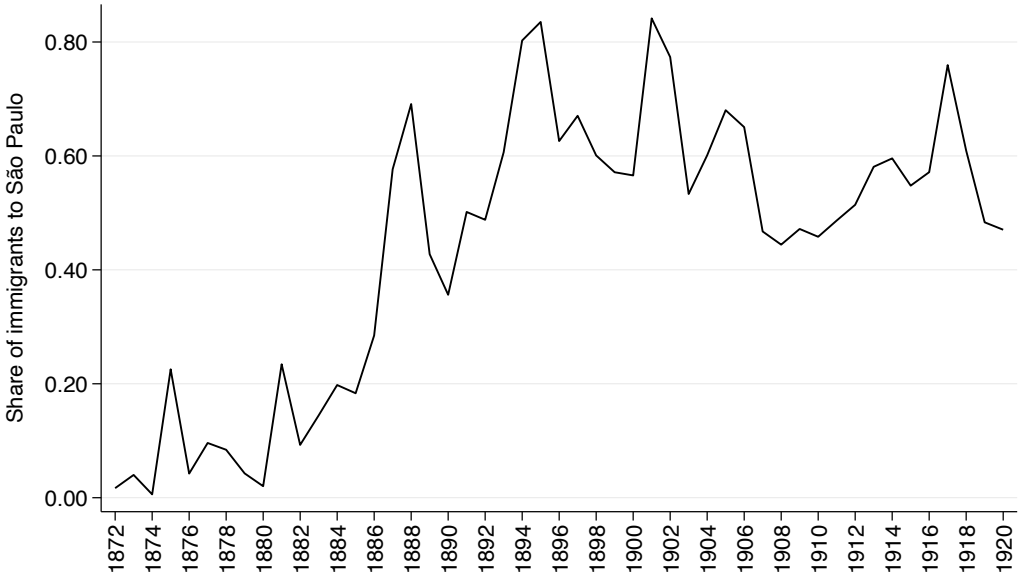
Arthur A. Viaro

Marcos Y. Nakaguma

Thales Z. Pereira

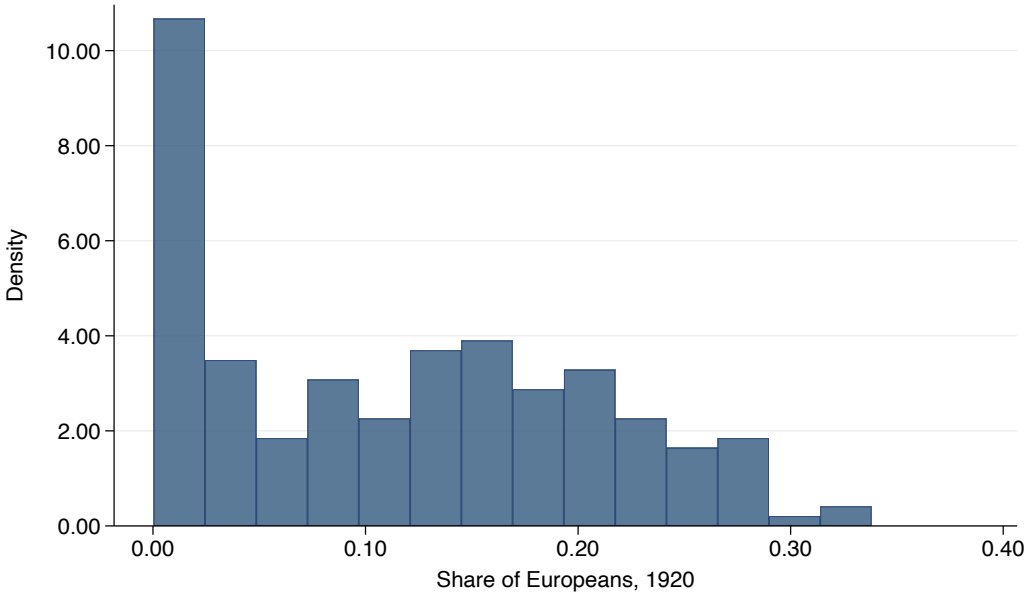
A1 Additional Figures and Tables

Figure A1: Share of São Paulo in the Total Inflow of Immigrants to Brazil, 1872-1920



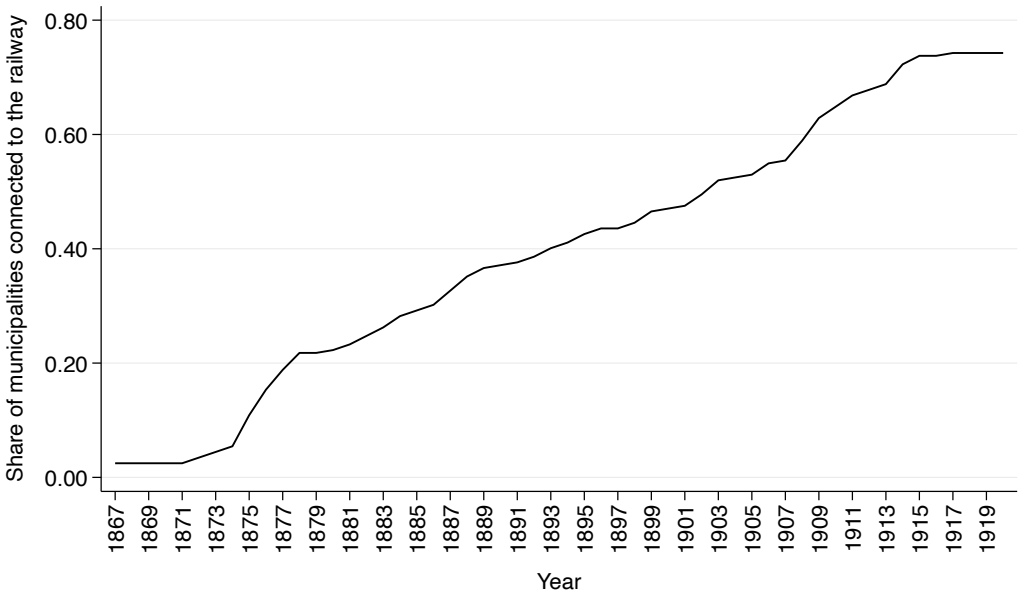
Notes: This figure presents the share of São Paulo in the total inflow of immigrants to Brazil between 1872 and 1920. Source: Relatório da Secretaria da Agricultura do Estado de São Paulo, Directoria Geral de Estatística (1908), and Instituto Brasileiro de Geografia e Estatística (1954).

Figure A2: Distribution of the Share of Europeans in 1920 across Municipalities



Notes: This figure presents the distribution of the share of Europeans across municipalities in 1920. The share is calculated as the proportion of European residents to the total population.

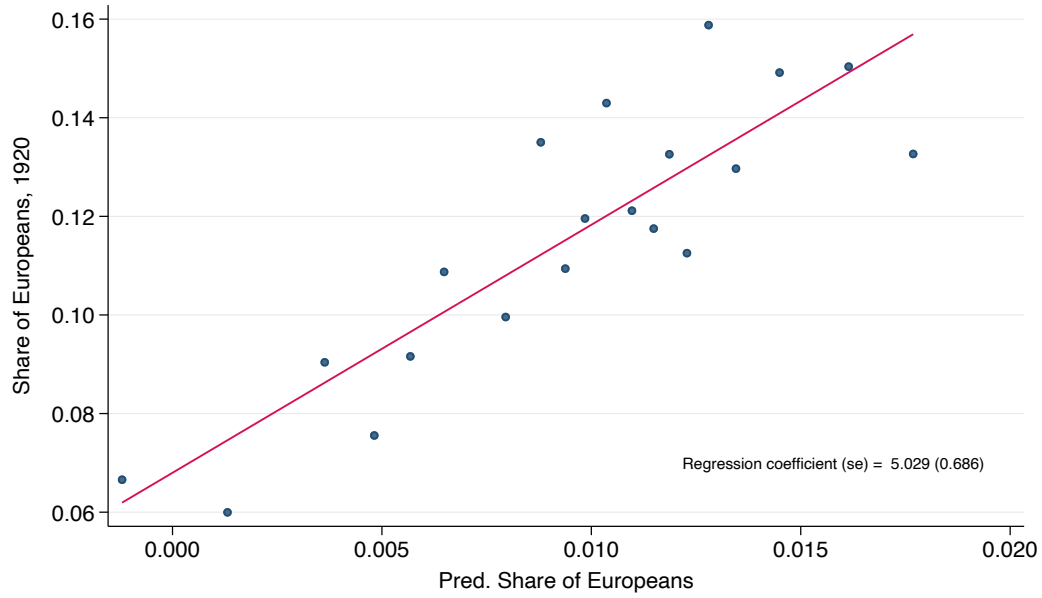
Figure A3: The Expansion of the Railway Network over Time, 1867-1920



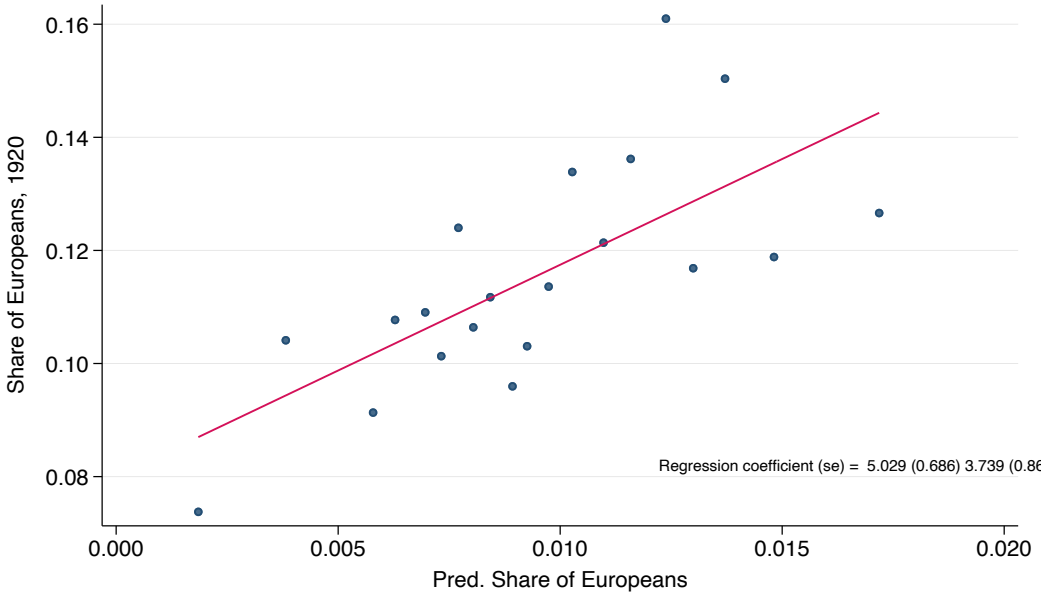
Notes: This figure presents the share of municipalities that are connected to the railway network in each year.

Figure A4: First Stage

(a) Baseline Estimates



(b) Controlling for Railway Connection



Notes: These figures present partial correlation binscatter plots illustrating the first-stage relationship between the predicted share of Europeans and the actual European share, conditioned on baseline covariates (Panel a). Panel b includes an additional control for the number of years a municipality had been connected to the railway network by 1920. The solid line represents the slope of the first-stage coefficient, with standard errors robust to heteroskedasticity.

Table A1: Correlates of Share of Europeans in 1920

	(1) Literacy rate	(2) Share of children in school	(3) Share of slaves	(4) Share of non-agro. employment	(5) Log population density	(6) Years connected to railway network
	Panel A. Demographic controls					
Share of Europeans, 1920	0.207**	−0.023	0.139**	0.234***	−0.287***	0.420***
	[0.092]	[0.081]	[0.062]	[0.069]	[1.166]	[12.326]
R-squared	0.043	0.001	0.019	0.055	0.083	0.176
	(1) Latitude	(2) Longitude	(3) Elevation	(4) River dummy	(5) Log distance to São Paulo	(6) Log municipality area
	Panel B. Geographic controls					
Share of Europeans, 1920	0.546***	−0.345***	−0.306***	0.274***	0.116	−0.003
	[0.715]	[1.026]	[1.370]	[0.390]	[0.848]	[0.679]
R-squared	0.298	0.119	0.094	0.075	0.013	0.000
	Potential yield			Soil dummies		
	(1) Coffee	(2) Cotton	(3) Sugarcane	(4) terra roxa	(5) acrisol	(6) latosol
	Panel C. Geographic controls					
Share of Europeans, 1920	0.600***	0.459***	0.497***	0.297***	0.057	0.183**
	[0.094]	[0.045]	[0.336]	[0.289]	[0.298]	[0.312]
R-squared	0.360	0.211	0.247	0.088	0.003	0.033

Notes: This table presents the OLS estimate of regressing the share of European immigrants in 1920 on various socio-economic and geographic characteristics separately. There are 202 observations included in each regression. Point estimates correspond to the standardized beta coefficients, and robust standard errors are reported in square brackets.

Table A2: Controlling for Railway Connection - Electoral Results in 1955

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. OLS estimates						
Share of Europeans, 1920	−0.299**	0.029	0.212	0.073	0.147	−0.358***	0.110
	[0.118]	[0.097]	[0.159]	[0.098]	[0.134]	[0.131]	[0.143]
	Panel B. Reduced form						
Pred. Share of Europeans	−0.159	3.196**	−2.355	−0.459	4.114***	−1.584	−2.150
	[1.478]	[1.472]	[2.198]	[1.204]	[1.559]	[1.576]	[1.726]
	Panel C. 2SLS estimates						
Share of Europeans, 1920	−0.042	0.855**	−0.630	−0.123	1.100**	−0.424	−0.575
	[0.372]	[0.436]	[0.589]	[0.305]	[0.491]	[0.404]	[0.471]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920						
Pred. Share of Europeans	3.739***	3.739***	3.739***	3.739***	3.739***	3.739***	3.739***
	[0.869]	[0.869]	[0.869]	[0.869]	[0.869]	[0.869]	[0.869]
KP F-stat	18.504	18.504	18.504	18.504	18.504	18.504	18.504
Mean dep. var.	0.427	0.093	0.341	0.098	0.166	0.329	0.374
Observations	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on the electoral results of 1955, incorporating the number of years a municipality had been connected to the railway network by 1920 as an additional control. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates according to specification in Equation (4). For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A3: Controlling for Railway Connection - Electoral Results in 1960

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel A. OLS estimates					
Share of Europeans, 1920	–0.088	0.019	0.073	0.016	0.089	–0.021
	[0.104]	[0.085]	[0.097]	[0.101]	[0.114]	[0.128]
	Panel B. Reduced form					
Pred. Share of Europeans	1.546	1.449	–2.600*	2.791*	–0.313	–1.733
	[1.254]	[1.244]	[1.370]	[1.613]	[1.482]	[1.748]
	Panel C. 2SLS estimates					
Share of Europeans, 1920	0.413	0.387	–0.695*	0.746*	–0.084	–0.463
	[0.338]	[0.325]	[0.390]	[0.435]	[0.375]	[0.449]
	Panel D. First stage estimates Dependent variable: share of European immigrants in 1920					
Pred. Share of Europeans	3.739***	3.739***	3.739***	3.739***	3.739***	3.739***
	[0.869]	[0.869]	[0.869]	[0.869]	[0.869]	[0.869]
KP F-stat	18.504	18.504	18.504	18.504	18.504	18.504
Mean dep. var.	0.304	0.120	0.515	0.295	0.164	0.397
Observations	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on the electoral results of 1960, incorporating the number of years a municipality had been connected to the railway network by 1920 as an additional control. Panel A presents the OLS estimates based on the specification in Equation (1). Panel B reports the reduced form estimates, Panel C provides the 2SLS estimates following the specification in Equation (5), and Panel D displays the first-stage estimates according to specification in Equation (4). For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A4: Excluding Municipalities Connected to the Railway Network Before 1900

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.194	0.901***	–0.894*	0.288	1.485***	–0.687**	–0.669*
	[0.311]	[0.341]	[0.500]	[0.220]	[0.432]	[0.337]	[0.369]
KP F-stat	29.023	29.023	29.023	29.023	29.023	29.023	29.023
Observations	108	108	108	108	108	108	108
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.517*	0.552**	–0.890**	0.945**	–0.273	–0.120
	[0.307]	[0.267]	[0.383]	[0.406]	[0.333]	[0.396]
KP F-stat	29.023	29.023	29.023	29.023	29.023	29.023
Observations	108	108	108	108	108	108
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results, excluding municipalities that obtained a railway station during the first three decades of the rail network expansion in the nineteenth century. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A5: Controlling for Industrialization and Urbanization Rate in 1940

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.173	0.526**	–0.239	–0.080	0.891***	–0.391	–0.425
	[0.341]	[0.254]	[0.440]	[0.237]	[0.302]	[0.324]	[0.372]
KP F-stat	34.856	34.856	34.856	34.856	34.856	34.856	34.856
Observations	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.246	0.420**	–0.605**	0.649**	–0.169	–0.239
	[0.246]	[0.214]	[0.273]	[0.295]	[0.293]	[0.319]
KP F-stat	34.856	34.856	34.856	34.856	34.856	34.856
Observations	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results, controlling for industrialization and urbanization rate in 1940. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A6: Excluding Municipalities with Higher Industrialization Rate in 1940

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.209	0.700*	–0.629	0.261	1.309***	–0.673	–0.572
	[0.412]	[0.358]	[0.552]	[0.295]	[0.495]	[0.426]	[0.434]
KP F-stat	15.976	15.976	15.976	15.976	15.976	15.976	15.976
Observations	101	101	101	101	101	101	101
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	President			Vice President			
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos	
	Panel B. Electoral results in 1960						
Share of Europeans, 1920	0.624*	0.470	–0.949**	0.839**	–0.521	0.058	
	[0.346]	[0.330]	[0.380]	[0.374]	[0.451]	[0.442]	
KP F-stat	15.976	15.976	15.976	15.976	15.976	15.976	
Observations	101	101	101	101	101	101	
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	

Notes: This table presents the robustness check for the effects of European immigration on electoral results, excluding municipalities with industrialization rates above the median in 1940. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A7: Excluding Municipalities with Higher Urbanization Rate in 1940

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.361	0.615**	–0.450	0.245	1.119***	–0.701**	–0.556
	[0.335]	[0.290]	[0.476]	[0.265]	[0.377]	[0.346]	[0.384]
KP F-stat	24.708	24.708	24.708	24.708	24.708	24.708	24.708
Observations	101	101	101	101	101	101	101
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.287	0.326	–0.527**	0.633**	–0.197	–0.179
	[0.246]	[0.243]	[0.252]	[0.292]	[0.358]	[0.380]
KP F-stat	24.708	24.708	24.708	24.708	24.708	24.708
Observations	101	101	101	101	101	101
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results, excluding municipalities with urbanization rates above the median in 1940. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A8: Excluding Capital, Baixa Sorocabana, and Santos Coffee Zones

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.259	0.622***	–0.349	0.094	1.191***	–0.597*	–0.421
	[0.329]	[0.237]	[0.411]	[0.237]	[0.309]	[0.321]	[0.334]
KP F-stat	41.800	41.800	41.800	41.800	41.800	41.800	41.800
Observations	178	178	178	178	178	178	178
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	President			Vice President			
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos	
	Panel B. Electoral results in 1960						
Share of Europeans, 1920	0.455*	0.428*	–0.740**	0.716**	–0.135	–0.162	
	[0.262]	[0.223]	[0.304]	[0.284]	[0.270]	[0.289]	
KP F-stat	41.800	41.800	41.800	41.800	41.800	41.800	
Observations	178	178	178	178	178	178	
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	

Notes: This table presents the robustness check for the effects of European immigration on electoral results, excluding municipalities from the Baixa Sorocabana, Santos, and Capital coffee zones. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A9: Excluding Municipalities with State-Sponsored Settlements

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.196	0.729***	–0.484	0.040	1.129***	–0.500*	–0.464
	[0.268]	[0.226]	[0.363]	[0.198]	[0.267]	[0.256]	[0.294]
KP F-stat	50.366	50.366	50.366	50.366	50.366	50.366	50.366
Observations	181	181	181	181	181	181	181
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.233	0.621***	–0.702***	0.758***	–0.187	–0.024
	[0.207]	[0.158]	[0.244]	[0.245]	[0.232]	[0.287]
KP F-stat	50.366	50.366	50.366	50.366	50.366	50.366
Observations	181	181	181	181	181	181
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results, excluding municipalities with state-sponsored immigrant colonies. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A10: Controlling for Land Inequality

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.203	0.747***	–0.519	0.058	1.155***	–0.542**	–0.466*
	[0.246]	[0.210]	[0.334]	[0.182]	[0.252]	[0.245]	[0.272]
KP F-stat	58.569	58.569	58.569	58.569	58.569	58.569	58.569
Observations	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.327	0.518***	–0.682***	0.814***	–0.263	–0.047
	[0.201]	[0.179]	[0.232]	[0.241]	[0.235]	[0.254]
KP F-stat	58.569	58.569	58.569	58.569	58.569	58.569
Observations	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results, controlling for land inequality in 1920. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

Table A11: Alternative Inference Methods

	President				Vice President		
	(1) Adhemar de Barros	(2) Juscelino Kubitschek	(3) Juarez Távora	(4) Plínio Salgado	(5) João Goulart	(6) Danton Coelho	(7) Milton Campos
	Panel A. Electoral results in 1955						
Share of Europeans, 1920	–0.227	0.728***	–0.474	0.056	1.138***	–0.552**	–0.438
	[0.244]	[0.202]	[0.334]	[0.176]	[0.244]	[0.237]	[0.267]
Cluster at 1872	[0.255]	[0.205]	[0.350]	[0.189]	[0.247]	[0.232]	[0.275]
Conley 25 km	[0.228]	[0.205]	[0.354]	[0.174]	[0.224]	[0.187]	[0.271]
Conley 50km	[0.252]	[0.252]	[0.397]	[0.105]	[0.292]	[0.202]	[0.283]
Conley 100km	[0.190]	[0.278]	[0.403]	[0.116]	[0.271]	[0.128]	[0.251]
Observations	202	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	President			Vice President		
	(1) Adhemar de Barros	(2) Henrique Lott	(3) Jânio Quadros	(4) João Goulart	(5) Fernando Ferrari	(6) Milton Campos
	Panel B. Electoral results in 1960					
Share of Europeans, 1920	0.316	0.504***	–0.661***	0.779***	–0.246	–0.041
	[0.197]	[0.168]	[0.223]	[0.233]	[0.227]	[0.250]
Cluster at 1872	[0.217]	[0.178]	[0.253]	[0.250]	[0.259]	[0.260]
Conley 25 km	[0.229]	[0.235]	[0.326]	[0.309]	[0.245]	[0.276]
Conley 50km	[0.189]	[0.241]	[0.338]	[0.296]	[0.237]	[0.246]
Conley 100km	[0.160]	[0.250]	[0.345]	[0.306]	[0.304]	[0.301]
Observations	202	202	202	202	202	202
Geographic controls	Yes	Yes	Yes	Yes	Yes	Yes
1872 Socioeconomic controls	Yes	Yes	Yes	Yes	Yes	Yes

Notes: This table presents the robustness check for the effects of European immigration on electoral results for alternative inference methods. The robust standard errors are clustered at the 1872 municipality level and account for spatial dependence as in Conley (1999), with a uniform kernel and varying distance cutoffs specified on the left. Panel A presents the 2SLS estimates based on the specification in Equation (5) for the 1955 elections. Panel B reports the 2SLS estimates for the 1960 elections. For a description of the baseline controls, see discussion in Section 6. Robust standard errors are reported in square brackets. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.

B1 Data