



BOLIVIA GENERAL ELECTIONS 2025

BACKGROUND

Bolivian voters will head to the polls on **August 17** to vote for the president, vice president, and all the seats in both houses of the legislature. If no candidate wins over 50 percent of the vote, or 40 percent with a 10-point lead over the runner-up there will be a run-off election scheduled for **October 19**.

These elections follow a period of political and economic turmoil. The ruling party, *Movimiento al Socialismo* (MAS), which has monopolized Bolivian politics for nearly two decades, is now deeply divided between factions loyal to incumbent President Luis Arce (“Oficialistas”) and those loyal to former President Evo Morales (“Evistas”). On May 14th, the Constitutional Tribunal barred Morales from running in the upcoming election, upholding a two-term limit. The recent ruling sparked widespread protests over increasing mistrust over judicial independence – with his loyalists viewing this as a politically motivated move by the opposition to sideline Morales ahead of the upcoming election. Clashes between police and protesters turned violent, resulting in five deaths and hundreds of injuries, deepening fears about the erosion of civil liberties and democratic norms. These events are the latest in a series of political showdowns that have exposed the fragility of Bolivia’s democratic institutions, like inconsistent court rulings and politicized prosecutions that have weakened public trust in electoral bodies.

The presidential race features ten registered candidates, including Eduardo del Castillo, representing the Arce-aligned MAS faction; Andrónico Rodríguez, who broke from MAS to run under a new leftist alliance; and opposition figures like Samuel Doria Medina, Jorge “Tuto” Quiroga, and Manfred Reyes Villa, who have formed various right-leaning electoral coalitions. No candidate currently commands a decision lead due to the MAS vote split and a fragmented opposition.

This election will serve as a referendum on Bolivia’s fragile democratic institutions, its handling of its economic crisis—including soaring inflation and fuel shortages—and its strategic role as a major source of lithium, a critical mineral for the global energy transition. Widespread voter dissatisfaction, inter-factional violence, and mistrust in the electoral process have added to concerns about the country’s political stability and future. Who will become the next president is not the only thing at stake, but other issues include whether the country’s democratic trajectory can be safeguarded amid increasing polarization and external pressure from global powers with a stake in Bolivia’s natural resources. Regardless of who wins, the fragmentation of MAS is a departure from Bolivia’s status quo over the past few decades, setting up a potentially transformative chapter for the country’s democratic evolution.

WHY YOU SHOULD CARE

Resource Geopolitics: Bolivia controls one of the world’s largest reserves of lithium, making the outcome of this election pivotal to global energy security. The next president will dictate how Bolivia uses this resource, whether the state will continue to favor state-led lithium extraction or open to more foreign investment. With the growing demand for electric vehicle batteries and other modern technology where lithium is required, Chinese, U.S. and European actors are all vying for access. A shift in regulatory or

KEY INDIVIDUALS

Samuel Doria Medina: Businessman, founder of the *Frente de Unidad Nacional (UN)* party, centrist social democrat, former Minister of Planning and Coordination.

Andrónico Rodríguez: Senate president, leader of Coca growers, former close ally and heir apparent of Morales. He left the MAS party and is running with *Alianza Política*.

Jorge “Tuto” Quiroga: Former Vice President to Hugo Banzer and President from 2001-2002, former finance minister, has run for president three times unsuccessfully, running with the right-wing *Libertad y Democracia (Libre)* party

Manfred Reyes Villa: Mayor of Cochabamba, leader of the *PB – Sumate* party, center-right. He is running on a platform of law and order.

President Luis Arce: Incumbent President, withdrew his candidacy after polling below 2% because of his handling of Bolivia’s economic crisis.

Evo Morales: Former president, founder of the MAS party, first indigenous president and a symbol of the country’s leftist turn. Morales was barred from running in this election due to constitutional term limits. His disqualification deepened the MAS party’s internal split and riled up his supporters.

KEY DEVELOPMENTS

May 14, 2025: Constitutional Tribunal blocked Evo Morales from running, citing a two-term limit.

May 16, 2025: Morales supporters clash with law enforcement in La Paz



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geopolitical alignment could disrupt global supply chains and goals for energy transition for a more sustainable world.

Escalating Political Violence: The disqualification of Evo Morales ignited deadly confrontations and blockades. The violent clashes in June left four first responders and one civilian dead and hundreds injured. The blockades on major highways have disrupted fuel and food distribution, exacerbating inflation and growing public frustration with the government and the state of the economy. The violence represents not only the internal rupture of the ruling MAS party but also a broader breakdown of institutional distrust. The use of security forces against protestors and perceptions of selective judicial decisions have raised concerns about creeping authoritarianism. If either side views the outcomes of the election as manipulated or unjust, Bolivia could face a prolonged crisis, deepening institutional fragility, and broader violence.

Economic Volatility: Bolivia is facing its worst economic crisis in over a decade. With inflation nearing 15%, foreign currency reserves depleted, and widespread shortages of fuel, compounding the crisis. Soaring unemployment, an increase in the cost of living and rising food prices have pushed economic issues to the forefront of key voter concerns. The next president will inherit these structural fiscal issues which are in part, a consequence of a long-standing reliance on natural gas exports. If the crisis continues or worsens – without the implementation of much-needed but painful economic reforms and austerity measures - it could trigger broader regional instability by triggering migration and straining trade relationships, especially with Brazil, Argentina, and Chile, possibly undermining investor confidence in the region as a whole. Given Bolivia’s strategic position in global lithium markets position, a sustained crisis could also disrupt supply chains and the green energy transition. Candidates are divided on how they will handle the economic crisis. Left-leaning candidates like Rodríguez and del Castillo are in favor of continuing state intervention in key sectors like natural gas, lithium, and mining, while opposition candidates such as Doria Medina and Quiroga are proponents of liberalizing the economy through increased foreign investment, subsidy cuts and reducing government spending.

KEY OUTCOMES

Institutional Crisis: Further violence or unrest, low voter turnout, or disputed results could trigger a constitutional crisis and impact Bolivia’s already fragile democratic institutions.

Leftist Fragmentation: The MAS vote may split between Eduardo del Castillo and Andrónico Rodríguez, allowing an opposition party candidate to advance in a runoff for the first time in nearly twenty years. The large candidate pool is likely a result of the political fragmentation, which has allowed for a more open playing field and greater uncertainty in this election.

Opposition Realignment: The center-right opposition remains divided amongst candidates like Jorge “Tuto” Quiroga, Manfred Reyes Villa, and Samuel Doria Medina, but recent polling shows that Doria Medina and Quiroga are polling above any MAS candidate. If the candidates are able to unify behind a frontrunner, they may break the MAS’s historical, electoral dominance, but continuing to stay fragmented risks losing this advantage.

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[IntelBrief: Protests in Bolivia and the Struggle to Form a Representative Government](#)

over his exclusion from the election, beginning the unrest.

June 2025: Deadly protests and blockades erupt across Cochabamba and Potosí. Five killed and hundreds injured.

June 20, 2025: President Luis Arce announces he will not be running for re-election, stating that he did not want to split the left-wing vote. Poor polling amidst frustration due to his handling of the economic crisis likely led to this.

June 3, 2025: Official registration deadline passes. Morales and Arce do not register. Andrónico Rodríguez is allowed to run after a temporary suspension of his candidacy on suspicion of party switching.

August 7, 2025: Reports emerge that the Aymara and Quechua communities, the two largest indigenous groups in Bolivia and longtime MAS supporters, are turning away from the party, citing economic hardships and unmet social needs. This shift threatens MAS’s rural stronghold as the election approaches.

KEY VOTER ISSUES

A May 2025 survey conducted by *Unitel* found that economic issues are Bolivian voters top concerns.

- Rising prices: 47%
- Corruption: 44%
- Fuel Shortages: 41%
- Dollar Shortages: 40%
- Unemployment: 32%
- The Political Situation: 24%

Source: Unitel, 2,500 responses, carried out May 22-26, 2025