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Politicising inequality: The power of ideas

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ABSTRACT

A contemporary challenge is inequality. This paper illustrates why ideas matter, and how they can change over time. Inequalities are reinforced when they are taken for granted. But this can be disrupted when marginalised people gain self-esteem; challenge hitherto unquestioned inequalities; and gain confidence in the possibility of social change. Slowly and incrementally, social mobilisation can catalyse greater government commitment to socially inclusive economic growth. This is illustrated with ethnographic research from Latin America, where income inequality has recently declined. Clearly, however, no single paper can provide a comprehensive account of political change in an incredibly diverse region. By highlighting some ways in which ideas matter (and the limitations of alternative hypotheses about increased fiscal space and democratisation), this paper merely seeks to persuade political economists to go beyond 'incentives'. Future efforts to tackle inequality might harness the power of ideas: tackling 'norm perceptions' (beliefs about what others think and do); publicising positive deviance; and strengthening social movements.

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1. Introduction

This paper explores the drivers of income inequality, and its abatement. Some political economists argue that income inequality persists if there are weak constraints on political elites, who resist redistribution for self-interested reasons (Acemoğlu and Robinson, 2013; World Bank, 2003). Accordingly, inequality is likely to wane with democratisation, as ruling parties permit some redistribution to placate the poor majority and ensure re-election. Others emphasise patron-clientelism: poor people support political patrons to secure their own material survival (e.g. employment and services). These rational coping mechanisms entrench ruling elites by curbing public critique and horizontal associations (Auyero, 2000; Putnam, Leonardi, & Nanetti, 1993; Weyland, 1996). Perhaps autonomous resistance could be enhanced by state-led redistribution, guaranteeing poor people's material security (Weyland, 1996: 6–7). These explanations of inequality all assume that behaviour is primarily self-interested.[1] But ideas also matter – as increasingly recognised (Kaufman, 2009; Rodrik, 2014; World Bank, 2015a). This paper contributes to this literature by exploring how shifts in ideas contributed to the recent fall in inequality in Latin America. Complementing earlier analysis, this paper synthesises ethnographic research to illustrate the significance of self-perceptions, stereotypes, distributive beliefs, and norm perceptions. It further details how these ideational shifts came about: through association, protests, social movements, critical media, strategic framing, iterative state-society reforms, transnational networking and regional diffusion. Going forwards, it suggests how to harness the power of ideas, and politicise inequality.

This paper takes a historical approach because egalitarian social change is slow, incremental, frustrated by setbacks, and often conflictual. It does not occur within a project cycle. To learn from what works, we need to look at the *longue durée*: to see how people come to reject stereotypes, contest hegemonic discourses, and gain confidence in the possibility of social change (see also Kaufman, 2009: 366). This premise contrasts with a tendency to focus on external interventions: big 'D' Development (Hart, 2001). The *World Development Report 2015: Mind, Society and Behaviour*, for instance, exclusively refers to short-term 'antipoverty policies and programs', such as 'self-esteem talks' in Peru (World Bank, 2014: 85, 90). It neglects long-term ideational change. Research on social accountability likewise concentrates on donor-funded programmes, not historical shifts. '[B]y treating social accountability initiatives like widgets to improve services, we ignore the broader socio-political context within which these widgets work or do not work – the history of the long-term processes of political bargaining, public–social movement alliances, previous experiences of citizen engagement and the networks within which collective actors (the agents for social accountability) are embedded'

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[1] This reflects a wider tendency in Development to assume self-interested motivations and focus on financial incentives: the Centre of Global Development's *Cash on Delivery*, the World Bank's *Results-Based Financing* scheme.

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(Joshi and Houtzager, 2012: 154; see also Fox, 2014; Hickey, 2009). Going beyond 'widgets', this paper explores how income inequality has been increasingly politicised and tackled in Latin America.

This paper is divided into three sections. Section 1 presents the theoretical framework. It articulates how different kinds of ideas can perpetuate inequalities, and pushes for more attention to 'norm perceptions' (beliefs about what others think and do). Section 2 explores why inequality fell in Latin America, between 2000 and 2010 – considering the role of fiscal space, democratisation, and social movements. Section 3 draws out some policy implications for development co-operation: strengthening social movements, and tackling norm perceptions by showcasing positive deviance.

2. Section 1: How do ideas perpetuate inequalities?

This section provides a theoretical framework that: articulates how wider social practices influence individual behaviour; distinguishes between different kinds of ideas; and illustrates how ideas can reinforce inequalities. This framework draws on concepts developed by psychologists and sociologists (Biccieri, 2017; Diekman, Eagly, Mladinic, & Ferreira, 2005; Ridgeway, 2011; Tankard and Paluck, 2016),[2] illustrated with insights from anthropology.[3] This nexus reveals the significance of (i) self-perceptions; (ii) internalised stereotypes; (iii) unquestioned acceptance of the status quo distribution; and (iv) norm perceptions (about what others think and do). Such analytical clarity finesses political analyses of inequality, which tend to conflate these disparate concepts (amalgamating them as 'ideas', 'culture' or 'social norms'). All beliefs are common in two respects. First, they are all developed, reinforced, and revised through people's observations, interactions and experiences of the world. Hence they are maintained by labour markets, politics, media representations and geography. Second, they exert unconscious influence on our behaviour; we are rarely aware of our own stereotypes, assumptions and norm perceptions. These connections and contingencies are detailed below.

2.1. Self-perceptions

'Self-perceptions' refer to how an individual sees themselves, e.g. as less competent or less deserving of status. These beliefs are learnt through direct observation, hegemonic discourses and media consumption. If marginalised groups see only white, able-bodied, heterosexual men monopolise in socially valued roles, they may doubt their own potential (Ridgeway, 2011; Twenge, 2001). If people like them predominate in low-status positions, they may have low self-esteem, underestimate their abilities, not thinking themselves capable or deserving of anything better. Live-in domestic workers, associating only with their *patronas*, accustomed to servitude and daily reminders of their inferiority, may come to regard themselves as worthless (Gálvez, 1989; Schellekens and van der Schoot, 1989: 298–301; SINTRASEDOM, 1989: 375). When marginalised groups are explicitly reminded of their stigmatised identities, they can become less confident and underperform (Hoff and Pandey, 2014; Ridgeway, 2011; Steele, 2010; World Bank, 2015a, World Bank, 2015b).

Self-perceptions may also perpetuate inequalities if disadvantaged groups do not identify with one another. These socially constructed divisions impede horizontal solidarity. Instead of capitalising on their greatest asset (numerical strength), marginalised groups may rely on vertical ties of elite patronage and guidance. If domestic workers do not interact, they may not develop solidarity (Gálvez and Todaro, 1989; Schellekens and van der Schoot, 1989: 298–301; SINTRASEDOM, 1989: 375). Similarly in Bolivia, before the 1980s, ethnic groups in the lowland and highland regions did not always identify as 'indigenous': they did not perceive themselves as relevantly alike. These self-perceptions were partly shaped by geography: rural isolation, together with scarce transport and communications networks, limited interactions and association (Jackson and Warren, 2005: 551). Atomisation and fragmentation are also said to curtail Peruvian coca growers' collective strength to contest neoliberalism at national level (Rice, 2012: 98–99). Given these debilitating and divisive self-perceptions, government provision of social protection might not reduce clientelism (contrary to Weyland, 1996).

2.2. Internalised stereotypes

Inequalities can also be reinforced through internalised stereotypes descriptive or normative assumptions about a person because they are a member of a group (a gender, race, caste, ethnicity, region, nationality, sexual orientation or religion). People acquire stereotypes through interactions, observation, and validation by trusted peers. If disadvantaged groups internalise these stereotypes, they may support privileged groups as leaders, perpetuating inequality. Such beliefs are difficult to dislodge. We tend to pay more attention to information that confirms our assumptions, so disregard occasional outliers (Bicchieri, 2017; Ridgeway, 2011; Steele; 2010; World Bank, 2015a, World Bank, 2015b).

Habituated to hierarchy, many elites in republican Bolivia saw themselves as ethnically and culturally different from indigenous peoples, so excluded them from national development (Fabricant and Postero, 2013; Postero, 2007: 55). Thus, the behaviour of white elites was not only motivated by economic self-interest, but also their socially-constructed identities and consequent reluctance to share with 'the other'. Pejorative stereotypes may also curb empathy and compassion. '[My *patrona*] does not see us as human beings of flesh and blood, who feel hunger and thirst', observed one Peruvian domestic worker (Schellekens and van der Schoot, 1989: 299).

In authoritarian contexts, where critique is quietened by fear of repression, political leaders may 'view the urban poor with contempt, as passive recipients of social welfare programs rather than as active participants in recent history' (Ciccariello-Maher, 2016: 42 on Venezuela). Such stereotypes can curtail support for democratic reforms. Elites may resist participatory processes if they regard indigenous groups as 'obstacle[s] to progress': 'savage', 'immature', 'passive' and 'unknowledgeable' (as in Bolivia and Ecuador – Fabricant and Postero, 2013: 191, 204; Radcliffe, 2015: 53, 113, 133). Such discrimination is not the preserve of wealthy elites, it can also prevail within leftist organisations (as in Ecuador – Rice, 2012: 61). Further, even if participatory reforms are introduced, stereotypes may constrain marginalised groups' political participation. For example, the Law of Popular Participation in Bolivia was marred by the colonial legacy of racist, infantilising discourses in participatory processes. Paternalistic elites assumed they knew best (Postero, 2007: 147). Widely-shared stereotypes thus curbed the transformative impact of participation.

Without interacting as knowledgeable equals, we may fear the unknown other. In 1989, enraged, violent mobs from Venezuela's barrios descended upon the city, encroaching upon high-income neighbourhoods. "The hills came down" – or so it seemed to wealthy elites (Ciccariello-Maher, 2016). The urban masses (struggling with neoliberal reforms, job losses and plummeting wages) were protesting transport price hikes (following the removal of gas subsidies). The Government's response was influenced by their stereotypes of the dangerous other: they called in the army to

[2] But uses slightly different terminology.

[3] Regrettably, this paper is only informed by English-language publications, omitting a wealth of knowledge.

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