

EDITORIAL

Inequality and Inclusion in Latin America

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Editors' foreword to the special issue.

In the past decade, but especially since the 2008 financial crisis, inequality has become a major issue of discussion on the economic, political, and intellectual agendas to an extent not seen in the period after World War II. The phenomenal editorial success of academic books such as Thomas Piketty's *Capital in the Twenty-First Century* (2013), the reverberations of the Syriza movement in Greece and the *indignados* movement in Spain, and the profound resentment toward the "political establishment" in the United States are expressions of a growing sense that Western societies are becoming more unequal and that access to wealth and opportunity for the poor and the middle classes is rapidly eroding.

Long considered the most unequal region in the world, Latin America might be expected to provide interesting insights into this growing global issue. This is particularly true, ironically enough, because the developed world seems to be facing many of the same problems that the region has had to deal with for decades, at a time when Latin America seems to be experiencing marked improvement in terms of equality as a result of reforms that have led to substantial improvements in recent years in key indicators, such as attendance in primary and secondary education, access to electricity, sanitation, health care, and sometimes dramatic reductions in poverty. In fact, between 2000 and 2010, the Gini coefficient declined in thirteen of seventeen Latin American countries, although this trend started earlier in places like Brazil. These positive trends were surprisingly widespread and affected countries governed by right- and left-leaning parties (though those governed by the left have fared better), as well as countries at different levels of economic development.

Despite the optimism of the first decade of the new century, particularly after much of the region outperformed the global North during the 2008 Great Recession, Latin America ultimately proved not to be an exception after all. Recent gains, however impressive they appeared at the time, now look more fragile than ever. Many throughout the region worry that the benefits of the commodity boom and the economic liberalization of the past twenty years were not fully shared (if shared at all) with them, and that they will once again have to carry a disproportionately heavy burden as the boom turns to bust. This special issue seeks to contribute to the ongoing debate on inequality and inclusion in Latin America and beyond, from a contemporary perspective that takes into account the many ramifications and intrinsic complexity of inequality and inclusion, as well their intellectual history.

The debate on inequality in Latin America is certainly not new. On the contrary, it is arguably the oldest continuously running debate on the subject anywhere in the world, which started when Europeans first set foot in the New World and which has taken many different forms since then. In many respects, such debates were a bellwether for their times. In sixteenth- and seventeenth-century Spanish America, it was mainly expressed in legal and theological terms, revolving around the human qualities of those under Spanish rule and the right of the Crown and the colonists to extract tribute or enslave the Native American and African populations. The biological and racial basis of inequality, one of the foundations of colonial rule in the region, came to the fore in the eighteenth century in the writings of intellectuals such as the Comte de Buffon, Hegel, Cornelius de Pauw, Francisco Clavijero, and others. The turbulent history of the newly independent Latin American states in the nineteenth century, which ironically began with the successful slave rebellion in Haiti, added to the mix the issues of equality before the law, political representation, and citizenship, as Latin American white elites tried to justify their political and economic monopoly at the

expense of disenfranchising indigenous, black, and mixed-race populations. With the start of the twentieth century, the arrival of Marxism and other sociological approaches helped redefine the debate on inequality by introducing an increasingly ideological tone to those debates and framing Latin American reality through key concepts such as class struggle, exploitation, and alienation. This trend would find a more modern formulation in the works of dependency theorists such as Immanuel Wallerstein, Fernando Henrique Cardoso, and Enzo Faletto, and others who analyzed the problem of inequality from the perspective of the subordination of Latin American economies and populations in the global markets. As if turning those postwar debates on their heads, the neoliberal turn of the last decades embraced international markets, while the end of the Cold War coupled with increasing levels of democracy promised to end extreme poverty and inequality through economic liberalization and the reform of political institutions.

Contemporary approaches to inequality in the region are heirs to the rich intellectual history briefly outlined above. In contrast to earlier debates, however, today's debates have also become increasingly complex and multifaceted to the point that there is now a richer body of literature not only on the causes of inequality in Latin America compared to any other region in the world, but also the factors contributing to its decline. Even though the problem of economic inequality has come once again to the fore, as could be expected at a time of severe financial and economic turbulence in the global markets, contemporary debates on inequality have expanded their reach to include other phenomena—such as gender inequality, the use of space, language discrimination, race and ethnic relations, higher education, and access to technology and the Internet—that seem to transcend the often reductionist nature of early approaches to the topic.

While the research focus varies from one study to the next, they similarly reject reducing our understanding of inequality to a single foundational phenomenon to which all other forms of inequality are subservient or from which they can be deduced. On the contrary, contemporary scholars recognize inequality as a complex constellation of interrelated phenomena with a wide arc of consequences for the development of democratic societies and which demands complex approaches and responses from academics and policy makers. This has led to new ways to measure inequality from different perspectives, including gender inequality (the gender-related development index, the gender equity index, and the global gender gap index, among others) as well as attempts to move past a focus on inequality in outcomes (by looking mainly at income distribution as measured by the Gini coefficient) in order to analyze inequality in terms of opportunities. These include through measures such as the World Bank's Human Opportunity Index, as well as research in Argentina and Brazil looking at how much income inequality can be attributed to the circumstances into which people are born.

At the same time that inequality is increasingly being viewed as a complex, multidimensional phenomenon, scholars are also increasingly recognizing its subjective nature, focusing not just on inequality and inclusion per se, but on how they are perceived and construed by individuals, the state, and the media. Understanding social perceptions of inequality and the way they are produced, reproduced, and disseminated is just as important as understanding and measuring inequality. Individuals' perceptions on inequality may or may not correspond to any objective reality as studied by economists, sociologists, and other researchers, but they play an important role in shaping social networks, communities, and political actions. Moreover, the rise of the Internet and social media has contributed to a decentralization of the debates on inequality, making it a global conversation that takes place both inside and outside the academic, financial, and multilateral institutions that traditionally have dominated the subject and the way it has been presented to the public.

With this in mind, this special issue of the *Latin American Research Review* attempts to capture the complexity of today's debates around inequality by focusing on both the reality and the perception of inequality in Latin America from a multidisciplinary perspective. In particular, the special issue is an attempt to demonstrate that, however useful they may be in general, cross-national measures of inequality cannot capture important aspects of inequality that require a historical and contextual understanding to fully comprehend the experience of inequality, not to mention contemporary struggles against it.

The issue begins with an article by Nora Lustig that analyzes the relationship between poverty, race, and government policies. More specifically, it examines how much poverty and inequality change in the ethnoracial space after fiscal interventions, paying particular attention to the effect of direct and consumption taxes, cash transfers, and subsidies on inequality and poverty in Bolivia, Brazil, and Guatemala. While programs such as Bono Juancito Pinto in Bolivia, Bolsa Família in Brazil, and Mi Familia Progresá in Guatemala “tend to redistribute more resources to the Afro-descendants and indigenous groups,” Lustig shows that they are “too small to make a significant difference in terms of ethnoracial inequality and differentials in poverty rates.” At the same time, other programs, such as the Special Circumstances Pensions in Brazil, disproportionately benefit the white population, thereby exacerbating rather than reducing ethnoracial inequalities.

Like race and ethnicity, gender also has long been an identity-based source of inequality in Latin America. As Cecilia Menjívar and Shannon Drysdale Walsh's article demonstrates, however, the consequences of gender inequality are anything but static and can be quite dramatic. This is clear in their study of the surge in violence against women in Honduras after the 2009 coup d'état that ousted President Manuel Zelaya. Their analysis points out that, while the Honduran government before the coup engaged in actions that disregarded gender-based violence against women, the situation has worsened with the post-coup government, which has taken "more direct measures to systematically persecute women leaders and assault, physically and sexually, women, thus expanding acts of omission as well as commission." Political exclusion and persistent inequality are at the heart of the failure of the state and the judicial system to protect women and take those who commit gender-crimes to justice. Together with other forms of structural, political, and symbolic forms of gender inequality, this has had the effect of normalizing violence in the lives of women and perpetuating impunity for the crimes committed against them.

Whatever the objective measures of inequality, Zaire Z. Dinzey-Flores's article on Puerto Rico's San Juan Mall, located adjacent to a public housing project "labeled popularly, but also through policy, as 'poor' and 'criminal,'" highlights the often ignored importance of perceptions in understanding the nature and consequences of inequality in its various dimensions. More specifically, Dinzey-Flores examines the impact of the spatial distribution of inequality on how people, rich and poor alike, experience the city. The juxtaposition of these extremes in the close proximity of a luxury mall threatens any meaningful social contract, as "seemingly public, but actually private spaces . . . [serve to remind people] how wealth is promoted by celebrated government subsidies in the form of corporate tax breaks, while the most destitute are vilified for their use of public welfare benefits."

Not surprisingly, those negatively affected by inequality do not simply stand idly by or turn to crime as a redistributive remedy. Civil society has a long history of mobilizing against inequality in its various forms, even if its success in reversing such inequality is difficult to measure. This is clear in Colin M. Snider's contribution to this collection, which focuses on student mobilization and public discourse on higher education during the June 2013 protests in Brazil. These protests, which began over an increase in bus fares, served as catalyst for Brazilian students to present their calls for educational reform. Yet they did not emerge in a vacuum, and Snider traces the origins of the students' revindications back to protests that took place in 1983–1984 and, in particular, 1968. According to Snider, the 2013 protests "built on the language of a democratic society to highlight the ongoing inequalities in access to free education, even while pointing to the ways structural inequalities limited access to higher education for the socioeconomically disadvantaged or Brazil's Afro-descendant population."

Felipe Cala's contribution similarly focuses on social mobilization against inequality in Brazil, contrasting two recent examples: the UN-led process of consultation and outreach that followed the Rio+20 conference, and the mobilizations and protests around the 2014 FIFA World Cup. In this way, Cala hopes to analyze how claims about inequalities in Brazil were articulated in these two global arenas. By discussing the connections between both events as "two chapters of the same story," the article aims to recount "the story of a state's deeply fraught relationship with its own citizenry."

The changing yet enduring nature of inequality in Latin America only seems to beg the ultimate question: What alternatives are there? In the provocative concluding article of this volume, Jeffery R. Webber challenges us to address the problem by abandoning the liberal ideology "underpinning much of the current investigation of inequality in the region" in favor of a Marxian and decolonized framework that offers a systemic critique of market capitalism's inherently undemocratic nature. For Webber, "the historical sociological framing of much of the recent mainstream literature has offered important contributions to our knowledge of the origins and patterns of trends in inequality, while . . . its conceptualization of thin social democracy as the appropriate limit on the region's reformist horizon reflects a failure of sociological imagination, with important implications for our understanding of capitalism, citizenship, and class." The resurgent and complex nature of today's inequalities, according to Webber, are a reflection of recent developments in Latin America's "new extractivism," a concept that offers a rich, dynamic, and totalizing perspective on the rhythms of capitalist accumulation, old and emerging axes of inequality, and forms of contestation in the twenty-first century. Going further, Webber concludes his article by putting these political and economic developments into conversation with a biographical portrait of Ecuadorian indigenous activist Luis Macas.

It is obviously beyond the scope of this collection to offer a comprehensive approach that addresses all of the different ways problems of inequality in Latin America may be approached. For this reason, it is also important to emphasize that the articles of this special issue are not intended to prescribe any particular intellectual or hierarchical order that would limit in any way the field of inequality studies in Latin America.

There are innumerable other subjects that need to be addressed by researchers, including unequal access to the rule of law, and the nature of the dependencies and vulnerabilities that are imposed on vulnerable groups by the weakness of public institutions and the strength of personal, patriarchal networks of power, resources, and influence. There is also the general problem of the politics of inequality in areas dominated or contested by nonstate actors, as well as the particular dynamics of inequality in relation to natural and environmental resources. Other potential topics include the inequalities that exist within groups commonly understood from the outside as “subaltern,” and the role of the rich, especially the superrich, in the shaping of a region in which they have a higher share of the income compared to other regions of the world.

The goal shared by the articles of this special issue is to make the case for an understanding of inequality that, while building on previous scholarship on the matter, seeks to offer new ways to conceptualize and address the subject; in other words, to highlight the importance of conducting a wider range of studies on inequality than has been the case in the past and that could not be included in any single volume. While not ignoring the material basis of inequality, the issue as a whole highlights the need for a more holistic perspective that captures the multidimensional and subjective aspects of inequality that a focus on income and poverty alone can often overlook. Implicitly, if not explicitly, the articles in this special issue suggest that societies are also growing less tolerant of both historical and more contemporary forms of inequality, a phenomenon similarly associated with the recent adoption by the UN of the Sustainable Development Goals as world guideposts for development, in developed and developing countries alike.

The articles in this special issue complement the existing literature that attributed declining inequality in the region to policies that led to a massive expansion of elementary school attendance in the 1990s, narrowed the earnings gap between high- and low-skilled workers, and targeted government programs such as cash transfers and other nonlabor social policies by drawing attention to their limitations and the possibilities they open up for new policies and forms of social mobilization. In this way, the articles also challenge the notion that recent advances will be sustainable without more dramatic transformations. Together, the articles in this special issue powerfully demonstrate that when researchers focus on the role of public policies alone, they neglect the critical role of social agency in demanding change and the ways in which public policies may co-opt and contain pressure for more radical change.

As the 2016 Panama Papers scandal shows, state and nonstate actors in the region play a fundamental role in supporting and promoting both local and global inequality. In yet another irony, given the stress on economic incentives in much of the literature on economic development and inequality, studying inequality in Latin America offers a unique comparative advantage given the region’s long history and myriad of experiences in coping with the consequences of inequality. Of course, a better, more comprehensive understanding of the nature and importance of inequality at best only offers broad guidelines for successfully reversing it. Just as we are growing accustomed to accepting the enduring nature of inequality, particularly in Latin America, we must also grow accustomed to searching for systemic solutions to inequality that can address all of its dimensions. Whole societies, as well as the institutions that govern them and the economies that provide the resources to drive them, will need to change. Recognizing that need is in part what motivated this special issue and remains perhaps the biggest challenge facing the region today.

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