

## Political participation and social exclusion: Latin American's paradox convergence\*

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T.H. Marshall's classic text: "Citizenship and Social Class", in which he discusses the interconnectedness of civil, political, and social rights, stipulates a positive relationship between democracy and social inclusion. The former provides a basis on which the losers of – socially polarizing – market processes can claim and obtain social rights.

In fact, the experience of Western Europe exhibits an evolutionary pattern with regard to the expansion of the right to vote, followed by the expansion of the welfare state, which led to a marked decrease in income and wealth disparities in society. Marshall's insight that the exercising of civil and political rights must be supplemented by additional social rights has become an unquestioned normative tenet in the industrialized countries. This seems to confirm the notion of a *causal* link between democratic participation rights and the granting of social rights.

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### *Latin America Does Not Fit the Theory of Democratic Inclusion*

However, this causal link does not seem to exist in Latin America. At the beginning of the twenty-first century and, thus, after three decades of democracy, Latin America still has the world's highest rates of inequality (together with Sub-Saharan Africa). In fact, high rates of inequality can be considered as a long-standing Latin American characteristic, encountered throughout the region (Lopez/Perry 2008).

It is true that, in recent years, there have been slight decreases in social inequality. In 2009, however, after five years of economic prosperity, the level of inequality was 60 percent higher in Latin America than in the OECD countries overall. Even Costa Rica and Uruguay, for a long time the two Latin American countries with the lowest income disparities, considerably exceed the levels reached by highly unequal Western European and East Asian states (ECLAC 2009; UNDP 2009; Bourguignon/Morrison 2002): more than 30 percent of the population live in poverty. Many have no or only insufficient access to medical care or education. The 15 percent of the population who have escaped poverty in recent years sometimes eke out a living which is barely above the poverty line and without social protection, completely dependent on the performance of the national economy and hence with the constant risk of once more sliding back down the social scale (ECLAC 2009). The significant income and asset disparities in Latin America can be related to structural factors, which over generations have reproduced inequalities (De Ferranti et al. 2004; World Bank 2006).

Obviously, the Latin American states have not managed to ensure wide-ranging social inclusion through liberal, representative democracies, which have now been in place for three decades. This calls into question the proposition that democracies are more sensitive to the wishes and needs of the population. According to this proposition, the expansion of the right to vote to a mainly poor population should have moved socio-political issues to the center of politics. In fact, in opinion polls three-quarters of the Latin American population regularly emphasize that the income distribution in their countries is unfair or very unfair, yet no significant improvements have been achieved (ECLAC 2009).

### *Democratic Deficit Theories Are Not Convincing*

In order to explain this paradox some argue that the inequalities are due to political regime deficits. It is maintained that political-legal equality itself is not fully-fledged, despite democracy. Consequently, the expansion of social rights is also hindered. Of particular importance with regard to this interpretation is the *regime analysis approach*, which is influenced by the liberal idea of democracy in terms of which the individual quest for freedom promotes freedom for all. In addition, Joseph A. Schumpeter's model of democracy (1942) and Robert A. Dahl's concept of "polyarchy" (1971, 1989) are taken into account. For both, institutionalized competition is decisive in guaranteeing political freedom. Therefore, this approach focuses on the quality of elections. The *regime analysis approach* is, furthermore, influenced by Max Weber's concept of power and the various institutional underpinnings of legitimate rule.

Thus, much research on Latin American democracies concentrates on the institutional design of government and on the regulation of political participation. It focuses on actors such as elites, political parties, and other associations. The deliberative aspects of democracy, as well as the effectiveness of structural factors, are treated as subordinate (for a critical treatment, see: Burchardt 2009; Carothers 2002). The focus on the formal aspects of political participation guided decades of empirical – often quantitative and comparative – investigation, which took Western democracies as the point of reference and by design arrived at the conclusion that Latin American democracies are diminished subtypes of the occidental model (Collier/Levitsky, 1995), that they have "defects," and that citizenship is of "low intensity" (O'Donnell, 1999).

But even if the quality of democracies is measured by these standards it must be noted that Latin America performs rather well in terms of political freedom in comparison to other regions, such as Eastern Europe (Freedom House 2009). Furthermore, the United Nations Development Program concluded in a long-term study that most of the elections in the region can be classified as "free and fair" and that they even include improved opportunities of political participation for disadvantaged categories, such as women and indigenous people (PNUD 2004). Moreover,

in some policy fields, such as participatory budgeting, the region features new forms of civil participation which can act as examples for other regions.

While the deficient formalization and institutionalization of democratic processes in Latin America undoubtedly affects freedom and political/legal equality it cannot really explain the eye-catching persistence of social inequalities. An extension of the analytical focus seems necessary.

### *The Exclusive Character of the Latin American Welfare State*

Another approach focuses on the deficits of the Latin American welfare state. To start with, this approach has to accommodate the fact that, in a number of countries, the creation of a welfare state began relatively early and that in Brazil, Chile, Uruguay, and Argentina social benefits such as health care, education, maternity protection and unemployment insurance were introduced – often with a universal design – with the beginning of import-substituting industrialization in the 1930s (Wehr, 2009).

At the time, the social policies of the region were influenced by the Western example, in particular the Bismarckian Model. They were linked to formal wage labor and served as integrating mechanisms for the rising classes of white-and blue-collar workers. Social security systems were accompanied by upward social mobility and secured, in their 1950s heyday, social benefits and rights for up to 60 percent of the population, depending on the country (Mesa-Lago 1978). Despite its later cutbacks and retrenchments, this social policy is still present today in various aspects (Barrientos, 2004).

Moreover, in terms of resources, Latin American welfare systems cannot be classified as chronically underfunded. During the period of import-substituting industrialization, a remarkable expansion of social policy took place in many countries and was often consolidated at a high level. After the cutbacks in the wake of the neoliberal reforms of the 1980s, social benefits began to increase slightly again in the 1990s. Today, the social spending of many Latin American states approximates 15 percent of GDP and accounts for half of total public spending (ECLAC 2009). Countries such as Costa Rica and Uruguay have a level of social spen-

ding comparable to that of Switzerland and Norway (Segura-Ubiergo, 2007; Wehr, 2009).

However, Latin American social policy has always been extremely selective. From the beginning it relied on a vertical integration strategy which consisted of improving benefits for the already insured population instead of expanding coverage horizontally. Formally employed urban labor benefited most from the periods of expansion, while the (mainly rural) poor remained excluded. Additionally, vertical integration gave rise to strong centralization, high administrative costs, and misallocation. Furthermore, it promoted clientelistic and paternalistic policies on the part of political parties and governments (Mesa-Lago 1985). The focus on men as the main providers did not match the real work and living conditions of many families, with their high incidence of female providers. Altogether, the Latin American welfare states were, even in periods of prosperity, unable to reduce social inequality to a significant degree. "Two-thirds societies" remained the best that could be achieved (Franco, 1996).

The neoliberal reforms of the 1980s, which emphasized directly addressing the neediest were not completely unsuccessful. In modified form, they are still in place in many countries of the region which are now governed by left-wing governments (Burchardt 2007). Nonetheless, they deepened even further the existing social inequalities. The reason was that they went hand in hand with increasing flexibilization and segmentation of the labor market, which drove many into the informal economy, with its "iron law" of supply and demand – also with regard to manpower. The rise of informality meant increasing poverty, inequality, and political powerlessness (Mesa-Lago 1994; Perry et Al. 2007; UNDP 2004). Welfare cuts also affected parts of the middle class, while a privileged few were able to maintain their social rights (Haggard/Kaufman, 2008).

To date, it is the higher income classes who have profited most from Latin American welfare systems, which are financed to a considerable extent by indirect taxes, burdening those outside the social security net (Huber et al. 2009). In Europe, every social quintile receives roughly 20 percent of

social spending, while in Latin America about 70 percent of the welfare benefits are concentrated on the top 10 percent of the population; in the regressive pension sector the figure is 80 percent (Wehr 2009). In turn, the poorest parts of the population do not even have guaranteed access to basic social services. Even in the country with the most egalitarian system, Costa Rica, the bottom income quintile receives a mere 12 percent of social spending. Thus, the welfare system exacerbates inequalities rather than reduces them (Goñi et al. 2008, Wehr, 2009).

This system, which tends to reproduce inequality, has been legitimized democratically for three decades. We must therefore suspect that these democracies' institutional setting prevents the effective social participation of the majority of the population, in spite of political/legal equality. Social inequality, poverty, and electoral democracy seem to generate a specific "Latin American Triangle" (PNUD 2004), in which liberal democracy does not promote social participation but legitimizes inequality. Now, it is known that in extremely unequal societies the socially privileged exert much more influence on democratic processes than weak social groups. This, in turn, generates the formation of authoritarian relations (Huber et al. 2009; Nel, 2005). As a result, liberal democracy could become its own gravedigger. It is in this respect that the question of inequality is linked to the question of democracy.

### *Entitlements and Endowments: The Shortcomings of Liberal Theory*

Not only democracy, but also the various economic development models applied in Latin America in the course of the twentieth century have had a limited impact on social inequality. This suggests that the reproduction of social inequality originates in the realm of political power, unaltered by the existence of consolidated democracies. This once more raises the question of how political participation and social inequality are connected.

This question has been a theme of liberal theory for some time. For Amartya Sen (1997), economic entitlements, social opportunities and social capabilities jointly ensure the realization of individual liberties. He defi-

nes entitlements, opportunities and capabilities as liberties and declares that their absence constitutes a lack of freedom. With this methodological "sleight of hand," Sen integrates socio-economic factors into liberal theory.

Similar to Sen, John Rawls stresses in his political philosophy (1971) that an individual's opportunities depend very much on social factors, which thus become crucial for inequality. For Rawls, it is important to have rules that (i) guarantee procedural justice and (ii) provide "justice as fairness." He adds to the liberal primacy of individual freedom and political-legal equality the dimension of a "fair equality of opportunity."

However, such attempts to include social factors in the liberal theory of democracy find themselves confronted by an acute problem: they still act on the assumption that individuals act on a rational-utilitarian basis and strive primarily for maximum freedom. The original formation of talents or competences takes place outside the system in which distributive justice is organized. Not the emergence of competence, but its promotion is the focus of a desirable public order. This promotion must be enabling and provide access to positions (and perhaps resources) via democratic procedures creating basic equality of opportunities.

Liberal approaches exclude from consideration those structural forces that shape both individual objectives and capabilities and thus circumscribe the exercise of individual freedom. These forces are located to a large extent in the domains of the family, religion, or work. The formative power of these domains is hardly touched upon in liberal theory, with its emphasis on procedures.

The expansion of social rights should not focus primarily on individual enabling processes and the democratization of access, but instead on the material and intellectual strengthening of disadvantaged milieus and communities. Endowments are of crucial importance. Their distribution sets a limit on what entitlements can achieve. It is in terms of material and intellectual endowments that those power asymmetries which restrict the exercise of formal rights are minimized (Cohen 1995). On this understanding, democratic participation needs redistribution so that a "participatory parity" (Fraser 2003) can be established.

### *The Concept of Social Democracy and Its Individualistic Bias*

Reflections of this kind, as well as the observations of T.H. Marshall, are also relevant with regard to the concept of “social democracy.” The basic insight here is that human equality is not a fact and that democracy on its own does not bring it about. “True” democracy must be conceived of as a political constitution, which assures its citizens not only political-legal equality, but also social inclusion (Heller 1971a, 1971b). The approach of “social democracy” completes liberal theory with the dimension of social participation rights. It assigns to the democratic state the duty of guaranteeing, through social policies, the necessary distribution of crucial endowments. Liberty and equality are considered as two sides of the same coin in the concept of “social democracy.” Liberty does not ensure equality, but a minimum level of equality is the precondition of liberty for all.

Like their liberal counterparts, however, current notions of “social democracy” focus on the individual and the consensus reached between individuals. They must be completed by a non-essentialist understanding of democracy and society. If the essence of (social) democracy is understood not as an aggregated expression of a political consensus, which is based on individual rationality and created for the overcoming of conflicts, but as a special form of establishing and dealing with social antagonisms, then the floor is open for a wide range of new theories and analyses (Laclau/Mouffe 1985).

Going beyond the focus on the individual, democracy can be understood as a specific relationship between different collective identities, which implies that the – not necessarily only rational – actions of these identities have to be taken into account. On the other hand, political power is to be considered from a dynamic perspective, as a continuous and insuperable simultaneity of reciprocity and antagonism (Laclau/Mouffe 1985). On this view, every social order is the result of sedimented political procedures, which are, due to their underlying antagonism, always based on some form of exclusion. Marshall’s theory of the welfare state provides an excellent example: according to him, the welfare state arises as a national class compromise among originally incompatible interests.



This compromise is stabilized through political and social rights, but has to be adjusted anew, time and time again.

### *Focusing on the Structures of Social Exclusion*

For a full understanding of equality and inequality, the categories of “social democracy” should be integrated into an encompassing theory of democracy. Such a theory should extend its focus beyond the democratic institutions to encompass also the social mechanisms which obstruct integration and the characteristics of the democratically organized and legitimated exclusion of certain collectives. In reversal of Fraser, the convergence between democracy and inequality in Latin America could be understood as “participatory disparity.”

This means that evident asymmetric power relations, such as corruption or clientism, are not simply deficit phenomena but inherent mechanisms of power. The frequently described grey areas of democracy are not “defects”; we rather find in them the crucial mechanisms that block or stimulate social participation. So far, Eurocentric tunnel vision (which, for that matter, neglects post-communist Eastern Europe) has tended to exclude them from consideration. A more appropriate analytical perspective would direct attention to the question of which actors, and with which interests, promote or constrain welfare policies and through which mechanisms and institutions (Wehr, 2010).

How the economy works is of considerable importance in this regard. Over the past few decades, the view has prevailed that the interplay of private property and the free market promotes general welfare and should be left to its own devices (Heritage Foundation 2009; Mandelbaum 2007). The term “market democracy” (BTI 2006) dominated the agenda. The insight – formerly discussed by classical thinkers about democracy such as Dahl (1989) – that (economic) privacy not only protects the individual but also can evolve into a residuum of non-democratic power, was neglected. Economic dynamics were mainly ignored in the analysis of democracy.

However, the empirical experience of Latin America did not validate the promise of the free market. From the 1980s on, neoliberal reforms gener-

ated only low growth rates and dramatically worsened the social situation of large parts of the population (Harvey 2005; Serra/Stiglitz 2008). Poverty and social inequality increased due to the flexibilization and segmentation of labor markets, the privatization of social security and cuts in public services.

At the same time, interest representative organizations representing disadvantaged social groups were weakened, while the economic elite was able to increase its political influence (Teichman 2008; World Bank 2006). Extreme income disparities and poverty are usually correlated with various forms of discrimination. They encourage clientism between the privileged and the subordinate. This jeopardizes political rights and may limit social rights (PNUD 2004).

While the question of social rights is of special importance, neither recent democracy and inequality studies nor the actual reform policies of left-wing governments – independently of their orientation (Roberts, 2008) – have set noteworthy trends. Nevertheless, important steps have been taken that may extend social rights significantly. The list includes land reform, the support of local production structures, the extension of fully-fledged health protection to the countryside and the informal sector, high-quality universal education, stronger regulation of foreign investors to national policies and more effective taxation of the wealthy.

Latin American tax revenues are outrageously low by international comparison. The elites are chronically undertaxed and in most countries tax systems are strongly regressive. They rely heavily on indirect taxation of consumption, with direct income or profit taxes accounting for only five percent of tax revenues (Goñi et al. 2008).

The design of labor relations is of equal importance: the (frequently precarious) access to jobs is still one of the central factors generating inequality in the region. Depending on the country, between 30 and 60 percent of the working population works in the informal economy, without minimum wages, work standards and social protection (ECLAC 2009). Nevertheless, Latin American labor relations have been neglected for more than two decades by the research community. Also of considerable importance in Latin America is the relationship between (frequently

deteriorating) local ecological conditions and the market and subsistence opportunities of local producers.

In the past, economic growth and stricter regulation were often postulated as a vehicle for the expansion of social rights. However, experience shows that this can lead to even more social inequality as the gap between formal and informal labor widens. What is badly needed is a deeper understanding of the structures and dynamics of Latin America's informal economy.

The need to reduce social inequality in Latin America is much more than a normative postulate: the issue will be decisive for the future of democracy in the region. This insight might facilitate coalitions (including segments of the middle class) that undertake the far-reaching structural reforms that so far have been successfully vetoed by the elites – in alliance with the middle class and often enough also with urban labor. Adapted to Latin American social reality, social democracy must be reconceived with a strong rural bias and an emphasis on those labor and power relations that cannot be reached by conventional labor legislation.

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