Identity Group Stratification, Political Economy & Inclusive Economic Rights

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This essay demonstrates the necessity of formally incorporating identity group stratification as a pillar alongside economic and political understandings of any political economy framework. We make our case by juxtaposing mutual inadequacies and myopic limitations associated with two influential but polar political economy frameworks – Marxian and public choice theory – since neither framework formally incorporates an identity group stratification lens beyond class reductionism. Finally, in addition to presenting an identity group stratification lens to economic thought, we present an Inclusive Economic Rights policy framework as a critical baseline component of human rights, foregrounding political economic tendencies toward identity group stratifications as a pathway forward to achieve a "moral political economy."

his issue of *Dædalus* is concerned with the question of how to create a "new moral political economy." Federica Carugati and Margaret Levi are explicit in emphatically stating that such an economy would have to dispense with neoliberalism, the political economy framework that has held sway over the last seven decades or so and is responsible for a concentration of both economic and political power, and the many crises we find ourselves in.¹ They emphasize a fierce urgency for a new framework to make society more inclusive and humane. That is the north star toward which we all should aim.

We argue that any vision for a moral political economy has to be, by design, management, and implementation, intentionally inclusive of all social identity groups (for example, race, ethnicity, gender, and so on), especially those that have been marginalized. The importance of a systemic political economy approach to understanding society often enjoys a resurgence whenever society undergoes a crisis of epic proportions. At least since the global financial crisis of 2007–2008, social scientists have excavated the analytical tools of political economy in attempting to understand the interrelationships between society's interest groups and how such relationships resulted in the crisis. Further, the heightened sense of the dangers of the climate emergency, in addition to the historic protests calling for racial justice in the United States in the summer of 2020, and, of course, the

unprecedented near pause of economic activity in the face of a global health crisis born out of the COVID-19 pandemic have added to the appeal of political economy in the present moment.³

The resuscitation of interest in political economy presents an opportunity for a critical engagement of various approaches. To build an analytical framework that accurately describes contemporary and historical political economy, it is necessary to understand and theorize around the integral and iterative role of identity group stratifications (IGS), along with the economic and political structures that come with it. In fact, altering the status quo demands it.

By "identity group stratifications," we mean the sorting of individuals into groups and the differential treatment that arises based on such sorting.⁴ An older and extensive literature in sociology documented how society is characterized by stratifications that go beyond class to include race, gender, religion, ethnicity, caste, and other categories.⁵ Given the interest of political economy in group interactions and contestations, incorporating wider conceptions of groups beyond class becomes critical in our efforts to forge a new moral political economy grounded in analytical authenticity. Further, it incorporates some of the central tenets of critical race theory: namely, the ways identity itself can serve as an investment, and how it can be codified into marketized value.⁶

By juxtaposing against two polar but influential political economy frameworks, Marxian political economy and public choice theory, we make the case for a political economy framework that more formally incorporates IGS.⁷ In this way, we reveal that both Marxian political economy and public choice theory are inadequate and blind to the role that IGS plays in shaping our political economy. In the final section of the essay, we introduce *Inclusive Economic Rights* as a moral policy framework and a component of human rights that emerges from foregrounding IGS as a pathway forward to achieve a moral political economy.

heory aside, the empirical reality of group-based disparities that persist and even widen with higher socioeconomic attainment motivates our foregrounding identity group stratification in political economy. In the specific case of the United States, for instance, one of its most enduring aspects is the degree of racial stratification particularly in, but not limited to, the economics sphere. Perhaps most enduring is the racial wealth gap that has its genesis in chattel slavery when Black people were literally the capital of an enslaving White plantation class. As of 2019, the typical Black household had 12 cents for every dollar in wealth held by the typical White household. Other wealth surveys looking at much more localized data have found racial wealth gaps that are much bigger than the national median. Unlike income and education, it was not until the 1980s that U.S. data sets began to measure more regularly and systematically household wealth across race.

Despite secular improvements in Black-White disparities in education and income, when it comes to wealth, the racial gap has largely remained unchanged since such data began to be systematically collected. As demonstrated by economist Darrick Hamilton and sociologist Regine O. Jackson, there has never been a substantial Black middle class with respect to wealth. Perhaps as pernicious as the enduring nature of the racial wealth gap is its tendency to rise rather than subside across families as educational attainment rises, demonstrating that education pays off less for Black people than it does for White people. A narrow focus on Black educational attainment without understanding the wider political economy context fosters what social psychologist Jennifer Richeson has referred to as a "mythology of racial progress." ¹³

The limited explanatory power of education, hence human capital, and the extent of the racialized nature of America's political economy go well beyond wealth. Black people face an unemployment rate that is on average twice that of White workers, irrespective of age and education.¹⁴ In terms of earnings, Black workers are paid less than their White counterparts, irrespective of social and economic characteristics. 15 Moreover, across business cycles, racial disparities in earnings widen and widen more for those with higher levels of education, further emphasizing the role of social identity hierarchy in establishing distribution of socially desired outcomes and how that intensity of sorting becomes magnified in the throes of a recession. 16 Black workers are the first fired in a recession and last hired once the economy recovers.¹⁷ In their report on economic recovery from the COVID pandemic, Darrick Hamilton and his coauthors showed that, although unemployment suddenly spiked for everyone regardless of race, of the workers defined as "essential," who were required to physically show up, Black and Latinx workers were overrepresented in low-wage customer and coworker contact-oriented occupations where health risks were the greatest due to proximity. 18 These conclusions were true even after educational attainment was taken into account.

Given the roles that race and identity play in profoundly shaping outcomes across time, its absence as a focal point in political economy analyses is gratuitous and myopic.

In this section, with the eventual purpose of demonstrating the value of an identity group stratification—lens, we outline the main contours of two well-known approaches to political economy analysis: Marxian and public choice theory. We choose these two because they have had great influence on scholarship, and are polar representations with regard to notions of capital, choice, and the roles of government. The latter point has especially been the case for public choice in the United States over the last fifty years. ¹⁹ What is common about these two approaches is their blind spots insofar as race and IGS are concerned.

The public choice approach to political economy was made famous by the writings of economist James M. Buchanan, who eventually won the Nobel Memorial

Prize in Economic Sciences. In this frame, society is composed of different interest groups: voters, politicians, bureaucrats, businesspeople, and so on. However, individuals within each group are "rational" utility maximizers engaging in behavior that is self-interested. Public choice, therefore, shares the methodological individualism typical of neoclassical economics but with a nuance: constituent group membership, in particular when accessing the public sector apparatus, creates counterproductive special-interest incentives that deter from market-based, individualized, incentivized rewards and punishments related to the so-called "public interest." While neoclassical economics is grounded in the implications of methodological individualism in market transactions, public choice draws out its implications in nonmarket settings. A main prediction of public choice analysis is that, in serving their own interests, individuals in different groups are likely to engage in strategies that do not serve the public interest. This approach yields a policy implication: limited government that enforces property rights in order to prevent the capture of the public welfare by particular interest groups.

The public choice approach to political economy does not have an explicit role for race except to say that questions about racism, discrimination, and differential treatment of groups cannot be resolved by government, because, at its core, the theory defines government as an entity that can be captured by special interests. ²² In this framework, racism is addressed by reducing the scope of government, and in its turn, encouraging economic competition with the market sanctioning bigoted behavior, and rewarding merit, effort, and human capital investments. ²³

No scholarship emerges without political and social context, and, for that matter, purpose. Scholars are not immune or ignorant to social and political contexts. As historian Nancy MacLean notes, despite its laissez-faire presumption that racism is implicitly and naturally sanctioned by market forces, public choice was not devoid of racial concerns and purpose. Using carefully conducted archival research, MacLean argues that the political and public rise of public choice economics was a reactionary and racist response appealing to racist sentiment about the gains of the civil rights movement of the late 1950s and the 1960s. ²⁴ She further argues that it is not coincidental that public choice came into its own during the segregationist politics of 1950s and 1960s Virginia at the time that James M. Buchanan, a key proponent and architect of the theory, was a professor at the University of Virginia. MacLean shows how Buchanan's early scholarship, conducted at the behest of Virginia's political and business elite, was motivated by countering the move toward the desegregation of public schools that came with the landmark *Brown v. Board of Education* decision.

Even though formal public choice scholarship abstracts from explicit contexts of race and IGS in general, MacLean's work claims that the approach's *raison d'être* was actually to cement White supremacy in the United States and elsewhere. ²⁵ In other words, public choice's insistence on small government was a political ruse in

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the guise of strictly scientific endeavors meant to preserve the White-dominated social hierarchy by constraining the government's ability to correct centuries of state-sanctioned exploitation of Black and Brown people. Based on MacLean's work, in defending property rights, public choice was in fact defending what critical race theorist Cheryl Harris has called "property rights in whiteness." ²⁶ Unfortunately and unsurprisingly, public choice has had great success in influencing the course of public policy in the United States over the last four decades. Indeed, Harris describes how institutions are often implicitly designed and function to define and codify "Whiteness as property;" adding MacLean's work applies Harris's analysis to the academy (public choice theory) itself.²⁷

Marxian political economy also suffers from a failure to consider race and identity. Although "Marxian political economy analysis denotes a range of political economy perspectives that are broadly connected to and in the tradition of the writings of Karl Marx," the "exploitation of labor by capital, within the capitalist mode of production, is fundamental to the understanding of the dynamics within the analysis." Marxian political economy centers group contestation, strictly defined by the "class struggle," as key to societal outcomes, namely capitalist accumulation at the expense of the working class. An implication of this analysis is that improvement in the welfare of the workers comes about by the overthrow of the capitalist mode of production and its substitution by a dictatorship of the proletariat. ²⁹

The original writings of Marx said very little about society's constitutive groups beyond class. However, in those instances in which questions of race were considered, sociologist Jean Belkhir describes that such considerations tended to be racist. For example, he writes: "Marx and [his longtime collaborator] Friedrich Engels were racists. Their attitudes were the typical attitudes of nineteenth-century Europeans who, regardless of their ideology, thought in terms of hierarchy of cultures with their own at the top and who occasionally used biology to provide scientific basis for their categorization of societies into higher and lower forms." Therefore, Marx's theory of political economy was, for all intents and purposes, a theory developed to emancipate the European White working class. Marxian political economy had an immense impact on the development of the social democratic states of Western Europe as well as the 1930s New Deal regime. In this way, like public choice, at its core, Marxist ideology was formulated in a way not devoid of White supremist hierarchy.

In the twentieth century, Black Marxist theorists made attempts to develop a theory of Marxism that incorporated race alongside class considerations. Notable in this instance is sociologist Oliver Cox's book *Caste*, *Class and Race* and political scientist Cedric Robinson's text *Black Marxism*.³³ These scholars acknowledged that class was stratified by race among other identities. However, the saliency of racial divisions within the working class was the result of the logic of capitalism.

That is to say, capitalism thrived on racial difference, and the solution to racism and to class exploitation in general was to overthrow capitalism.

However, racism predates the development of industrial capitalism in the West.³⁴ Further, the empirical evidence that we present above is not consistent with class reductionist Marxist tropes that treat racial disparity as an issue bound simply to how Blacks are sorted along skill and resource distributions. In other words, racial difference in key economic outcomes cannot be fully explained by a clustering among the less skilled and lower resourced. Unsurprisingly, within race, more education is associated with better economic outcomes. However, the irony is that, across groups, Black workers with a college degree are most harmed due to their race relative to similarly qualified White workers, and this difference is amplified during recessions.³⁵

In the opening section of our essay, we showed that racial and identity group stratification permeates many facets of society. Thereafter, we argued that, despite persistent and enduring IGS, political economic analysis does not adequately consider race or other IGS more broadly, especially when juxtaposed against the two polar opposites of economic thought. In this section, we present a framework that centers IGS within political economic analysis.

The departure point or substantive addition for IGS in mainstream economics is the subfield of stratification economics, which "fills [the] void and systematizes various critiques regarding the inabilities of neoclassical economic theory to provide a coherent explanation for persistence of inter-group economic inequalities beyond human capital or subaltern group deficit models."³⁶ Stratification economics, which traces its intellectual lineage to the work of sociologist and historian W. E. B. Du Bois, economist James B. Stewart, economist and Nobel laureate W. Arthur Lewis, and critical race theorist Cheryl Harris, is motivated by providing a framework for why intergroup disparity emerges and persists.³⁷

The IGS approach to political economy shares a similarity with Marxian analysis in the sense that societal outcomes are played out at the level of groups. In this way, IGS does not share the methodological individualism of public choice analysis. Further, in Marxian political economy, the units of analysis are groups defined strictly by class – "capitalists" and "workers" – while group formation in IGS analysis is more nuanced, layered, and intersectional. Well beyond class, social identity itself offers material, political, social, and psychological rewards for membership associated with identity-group belonging. As such, group solidarity becomes a basis by which dominant groups can enhance their rewards at the expense of some subaltern other. IGS political economy analysis, therefore, goes beyond the narrow class concerns of Marxian political economy analysis. That is, it allows for identity group solidarities, relative group status hierarchies, that cut across class.

The existence of extra-class identity group solidarities was apparent in W. E. B. Du Bois's classic text *Black Reconstruction*, and later in Cheryl Harris's foundational article "Whiteness as Property." ³⁸ Harris citing Du Bois writes:

W. E. B. Du Bois's classic historical study of race and class, *Black Reconstruction*, noted that, for the evolving White working class, race identification became crucial to the ways that it thought of itself and conceived its interests. There were, he suggested, obvious material benefits, at least in the short term, to the decision of White workers to define themselves by their Whiteness: their wages far exceeded those of Blacks and were high even in comparison with world standards. Moreover... there were real advantages not paid in direct income: whiteness still yielded what Du Bois termed a "public and psychological wage" vital to White workers... The central feature of the convergence of "White" and "worker" lay in the fact that racial status and privilege could ameliorate and assist in "evad[ing] rather than confront[ing] [class] exploitation." Although not accorded the privileges of the ruling class, in both the North and South, White workers could accept their lower class position in the hierarchy "by fashioning identities as 'not slaves' and as 'not Blacks." Whiteness produced – and was reproduced by – the social advantage that accompanied it.³⁹

IGS political economy analysis shares some territory with the concept of racial capitalism, "a system in which race functions to establish material and status hierarchies within the broad working class. Under racial capitalism, all workers are exploited, but Black and Brown workers are exploited, excluded, surveilled, dispossessed, incarcerated, and sometimes killed. White workers are treated as full citizens, with the protection of laws, and large apparatuses devoted to facilitating their participation in at least some of the material benefits of... capitalism."⁴⁰

However, IGS political economy differs from racial capitalism. Racial capitalism sees capitalism as the culprit. In other words, the chain of causation begins with capitalism leading to establishing and exploiting racial hierarchies in society. For IGS political economy, the causation is iterative and bi-directional. That is, identity groups organize themselves in such a way as to establish hierarchy, and although capitalist systems may be a potent mechanism to reinforce these hierarchies, it is not the sole means of establishing dominance. Hierarchical dominance around identity groups exists under socialist economic regimes.⁴¹ Thus, IGS political economy analysis recognizes the fragility of class coalitions in multiracial societies. 42 Second, IGS political economy predicts that race becomes more pronounced with class, whereas racial capitalism is limited to race mattering to the extent that it coalesces with low class status. As described earlier, IGS articulates that race goes well beyond class and, indeed, becomes more relevant with higher class in the marketplace. Third, IGS political economy analysis incorporates intersectional analyses, including the awareness and context by which racial identity intersects in nuanced and context-specific ways with other social identities.

A main prediction of IGS political economy analysis is that identity group inequalities (that is, societal hierarchies at the level of groups) are maintained precisely because dominant groups accrue material, political, and psychological returns to such dominance vis-à-vis the subaltern group. For example, IGS political economy analysis sees the racial wealth gap as resulting from material and nonmaterial returns to "Whiteness" and the formal and informal structures that uphold such dominance.⁴³ This type of racialization and IGS is not unique to the United States. Throughout the world, structures of power have long demarcated subgroups of people in hierarchical ways that reverberate politically as to who is worthy of and entitled to receipt of public benefit.⁴⁴

This type of weaponization for relative-status and preferred group outcomes is a pervasive feature of society not limited to economic effects. Much evidence has been accumulated showing that race is used strategically in the political sphere as well. As Race pervades all aspects of U.S. society and political economy.

key feature of IGS is that identity itself serves as an asset (or debt) that can be beneficial (or costly) depending on the political economy. Individuals from the subaltern group can attempt to invest in attributes associated with the identity of the dominant group with the expectation of moving up the social and economic hierarchy.

Public choice's emphasis on "property rights," especially without recognition of the different material and psychological rewards or cost structure accrued to different identities, preserves prevailing social hierarchy in a context where that property was initially unjustly obtained. Rights to such property complements or facilitates benefits and relative status to those enjoyed by the dominant identity group: what Cheryl Harris might describe as a doubling down on "property rights of whiteness." ⁴⁶ Even though Marxian political economy sees property rights as the source of inequality, it is blind to the fact that identity can itself be property conferring material and nonmaterial benefits. Seen this way, the abolishment of private property, a hallmark of Marxian political economy, does not necessarily result in the destratification of society because of the property rights embedded in social identity.

Creating a moral political economy requires that identity ceases to have transactional value. This is not a call for the elimination of identity. There very well may be aesthetic and cultural attachment to one's identity. Moreover, in the process of assimilation, the burden of identity fusion is generally borne on the less dominant identity group acquiescing to the norms, history, and culture of the more dominant group. What we are calling for is the end of material and hierarchical positioning attached to social identity.

Without a potent policy alternative grounded in economic justice that neuters racist regimes and provides pathways for economic security and self-determination

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for all its people, White supremacy (and other ideologies of oppression linked to social identity) and the despotic political appeal for divisive leadership will remain. Centering human rights and human dignity, through a framework of what we are calling *Inclusive Economic Rights*, is a way to sever the link between identity and societal outcomes. Inclusive Economic Rights ensures that, among human rights, political, social, civil, and cultural rights are not enough, but rather *inclusive* economic rights are necessary as well. A framework of inclusive economic rights is intentionally inclusive of all social identity groups (for example, racial, ethnic, gendered, and so on), especially those that have been marginalized.

In the wake of World War II and the dismantling of the fascist Nazi regime, the United Nations General Assembly issued the landmark Universal Declaration of Human Rights (UDHR) in 1948.⁴⁷ The Declaration described human rights to be universal and related to the maintenance of human dignity, and asserted that nation-states had a responsibility to deliver those rights. The UDHR identified five categories of human rights: civil, political, social, cultural, and economic. For example, Articles 23 and 25 of the UDHR articulated economic rights to employment, housing, food, medical care, and so on. The concept of economic rights also has deep roots in the civil rights movement. Reverend Martin Luther King, Jr. pushed for guaranteed jobs and guaranteed income in his final years.⁴⁸

Starting in the 1950s, a systematic campaign arose to diminish the moral arguments that were made in favor of economic rights. Key among those leading the onslaught were leaders of the Mont Pelerin Society (MPS) founded in 1947 by the Austrian economist Friedrich Hayek and boasting the membership of Milton Friedman, George Stigler, Ludwig von Mises, Frank Knight, and Karl Popper, among others. The MPS, more than any other organization, is responsible for providing the dubious intellectual arguments that led to the ascendancy of neoliberalism in the latter half of the twentieth century.

MPS proponents argued that economic rights would interfere with the "choice" and "freedom" of the market. Given that violence was the preserve of the political sphere and not that of the market, according to influential members of the MPS, the only rights that required government guarantee were civil, political, and those pertaining to the protection of property. These sets of arguments, as dubious and historically unfounded as they were, launched the age in which the language of human rights was neoliberalized to the exclusion of economic rights.⁴⁹

It is time to reclaim the scale, ambition, and moral fortitude of the economic rights movement of the twentieth century. However, IGS's approach to political economy stresses that, if economic rights are to be a force for breaking down inequalities, they have to be guaranteed within a framework of inclusive economic rights. That is, they have to be guaranteed in a way that is purposefully inclusive of all identity group stratifications in design, management, and implementation (for example, antiracist, antisexist, antinativist, and so on). Economic justice ini-

tiatives have historically excluded subaltern groups, as would be predicted by the IGS approach to political economy.⁵⁰

Regardless of ideology, economics, politics, and social stratification (as measured by class, race, gender, nativity, and other markers of identity) have never been separable. As inequality continues to grow, both within and across nation-states, the economics profession and society writ large need to move beyond the overly simplistic Marxist framework that reduces group struggle to one of class, as well as the neoliberal orthodox economic framework that centers markets and individual choice devoid of adequate understanding of resource, power, and distribution. We need new thinking that recognizes the strategic incentives and disincentives associated with group sorting beyond class, with an ultimate goal of generating a moral political economy grounded in fairness, justice, and our shared prosperity.

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- ³⁷ W. E. B. Du Bois, "The Economic Future of the American Negro," *Publications of the American Economic Association* 7 (1) (1906): 219–242, https://www.jstor.org/stable/2999974; James B. Stewart, "Historical Patterns of Black-White Political Economic Inequality in the United States and South Africa," *Review of Black Political Economy* 7 (3) (1977): 266–295, https://doi.org/10.1007/BF02892199; W. Arthur Lewis, *Racial Conflict and Economic Development* (Cambridge, Mass: Harvard University Press, 1985); and Harris, "Whiteness as Property."
- ³⁸ W. E. B. Du Bois, Black Reconstruction: An Essay toward a History of the Part Which Black Folk Played in the Attempt to Reconstruct Democracy in America, 1860–1880 (Philadelphia: Albert Saifer, 1935).
- ³⁹ Harris, "Whiteness as Property," 1741–1742.
- ⁴⁰ Ted Fertik and Maurice Mitchell, "We Need a Multiracial, Working-Class Alignment," *Boston Review*, April 27, 2020, https://www.bostonreview.net/forum_response/ted-fertik -maurice-mitchell-why-we-need-multiracial-working-class.
- ⁴¹ For an example on Cuba, see Alejandro de la Fuente, "Race, Ideology, and Culture in Cuba: Recent Scholarship," *Latin American Research Review* 35 (3) (2000): 199–210, http://doi.org/10.1017/S0023879100018719.
- ⁴² Fertik and Mitchell, "We Need a Multiracial, Working-Class Alignment."
- ⁴³ See Chelwa, Hamilton, and Stewart, "Stratification Economics."
- 44 Ibid.
- ⁴⁵ See Sophie Schuit and Jon C. Rogowski, "Race, Representation, and the Voting Rights Act," *American Journal of Political Science* 61 (3) (2017): 513–526, https://doi.org/10.1111/ajps.12284; and Jamila Michener, "Race, Poverty, and the Redistribution of Voting Rights," *Poverty & Public Policy* 8 (2) (2016): 106–128, https://doi.org/10.1002/pop4.137.
- ⁴⁶ Harris, "Whiteness as Property."

- ⁴⁷ United Nations General Assembly, *Universal Declaration of Human Rights*, December 10, 1948, https://www.un.org/en/about-us/universal-declaration-of-human-rights.
- ⁴⁸ Martin L. King, Jr., *Where Do We Go from Here: Chaos or Community?* (New York: Harper & Row, 1967).
- ⁴⁹ See Jessica Whyte, *The Morals of the Market: Human Rights and the Rise of Neoliberalism* (New York: Verso Books, 2019).
- ⁵⁰ For examples in the U.S. context, see Ira Katznelson, *When Affirmative Action was White: An Untold History of Racial Inequality in Twentieth-Century America* (New York: W. W. Norton & Company, 2005).