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Attitudes Towards Horizontal Redistribution Across the Globe

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DOI
10.17645/si.8387

Publication date
2024

Document Version
Final published version

Published in
Social Inclusion

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Link to publication

Citation for published version (APA):
Stewart, F., Langer, A., & Kuppens, L. (2024). Who Wants To Share? Attitudes Towards Horizontal Redistribution Across the Globe. *Social Inclusion*, *12*. https://doi.org/10.17645/si.8387

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Download date:17 Oct 2026

Social Inclusion
2024 • Volume 12 • Editorial 8387
https://doi.org/10.17645/si.8387

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EDITORIAL

Open Access Journal

Who Wants To Share? Attitudes Towards Horizontal Redistribution Across the Globe

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Submitted: 28 March 2024 **Published:** 16 April 2024

Issue: This editorial is part of the issue "Who Wants to Share? Attitudes Towards Horizontal Redistribution Across the Globe" edited by Frances Stewart (University of Oxford), Arnim Langer (KU Leuven), and Line Kuppens (University of Amsterdam), fully open access at https://doi.org/10.17645/si.i414

Abstract

While recent literature has extensively addressed inequalities between households or individuals, known as "vertical inequalities," there remains a dearth of research on socio-economic disparities among culturally defined groups, termed "horizontal inequalities" (HIs). In diverse societies, addressing such group disparities is imperative to promote economic efficiency, political stability, and social cohesion. This thematic issue investigates the level of public support for HI-correcting policies across nine contexts: Brazil, South Africa, Nigeria, Malaysia, Kenya, Western Balkans, India, the United States, and Northern Ireland. The articles within this issue collectively identify and analyze crucial factors at the individual, group, and national levels. In this editorial, we summarize major findings, reflecting on the salience of group identity across majority and minority contexts, the role of perceptions vs more objective measures of inequality and its causes, and the significance of shifting political climates and societal discourses.

Keywords

affirmative action; attitudes; ethnicity; horizontal inequalities; race; redistribution

1. Introduction

Since the 1960s, the concept and phenomenon of inequality have been widely studied across a range of disciplines. Most research has focused on income and wealth inequalities between individuals or households, or what Stewart (2002) termed "vertical inequality" as distinct from "horizontal inequalities" (HIs), that is, socio-economic inequalities between culturally defined groups. Socio-economic HIs cover a range of dimensions, referring for example to inequalities in the ownership of assets, incomes, and

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employment opportunities. They may also pertain to inequalities in access to a range of social services (including education, healthcare, and public housing) as well as health and educational outcomes. Hence, socio-economic HIs cover both inequalities in opportunities and outcomes.

While much less attention has been paid to HIs in the massive literature on inequality, there are important reasons to be concerned with their presence. On the one hand, HIs matter because they may affect people's happiness and well-being, and may unfairly trap individuals and groups in a position of inferiority. On the other hand, HIs may also matter instrumentally. Reducing severe socio-economic HIs may be necessary for maintaining political stability and social cohesion and for promoting economic efficiency in diverse societies (Stewart, 2008). A growing body of both qualitative and quantitative research has found evidence that the presence of HIs significantly increases the risk of violent conflicts (e.g., Cederman et al., 2011; Langer, 2005). Furthermore, case study research from across the globe has shown socio-economic HIs to be extremely persistent, locking certain groups into positions of inferiority, sometimes even for centuries (e.g., Canelas & Gisselquist, 2018; Stewart & Langer, 2008). Hence, in cases where there are sharp and persistent socio-economic HIs, there may be a strong case for the introduction of redistributive policies aimed at correcting socio-economic HIs—or what we term "horizontal redistribution" (HR).

The impact of inequalities on people's well-being and social cohesion depends as much on individuals' perceptions of HIs as on the "objective" measured inequalities. While extensive research has been conducted on perceptions of vertical inequalities (e.g., Hauser & Norton, 2017) as well as on how perceived levels and sources of income inequality affect preferences for redistribution in Western countries (e.g., Bowles & Gintis, 2000; Dion & Birchfield, 2010), extremely little research has been conducted on the drivers and consequences of people's attitudes towards HR in diverse societies. Existing research concerning people's attitudes towards HR is largely limited to research on affirmative action in the United States. The objective of this thematic issue is to address this academic and policy void by analyzing support for group-based redistributive policies in nine different contexts (i.e., the United States, Brazil, South Africa, Nigeria, Malaysia, Kenya, Western Balkans, India, and Northern Ireland) using a variety of methods, including statistical analysis drawing on perceptions surveys, and discourse and historical analysis.

In what follows, we first discuss the main themes addressed in the contributions. After discussing the main themes and lessons learned, we identify some avenues for future research.

2. Themes in This Thematic Issue

2.1. Salient Identity Groups

All contributions in this thematic issue deal with contexts where there are substantial socio-economic HIs between different groups. Yet, the characteristics of the salient groups vary across the cases. In the United States, Brazil, and South Africa, redistributive policies across races aim to overcome the disadvantage of the country's Black populations following histories of slavery, settler colonialism, and Apartheid. Whereas these policies favor the majority in South Africa, Blacks constitute minorities in Brazil and the United States. In Malaysia too, the policies favor the majority—the historically disadvantaged population of local origin—as against the more privileged Chinese group. Inequalities in Nigeria, Kenya, and the Western Balkans in contrast follow ethnic lines. In most of these cases, the most economically disadvantaged ethnic groups

constitute a minority of the population. Other contributions focus on yet different dividing lines, including religion in Northern Ireland and caste in India.

The population share of salient groups is important in two contradictory ways. On the one hand, in democracies, the majority populations tend to have the political power that enables them to introduce redistributive policies. On the other hand, the budgetary cost of policies is lower the smaller the population share of the disadvantaged group(s). We see from the cases covered here that these factors play out in different ways in the examples with redistributive policies adopted in both majority and minority contexts. However, there are no effective redistributive policies towards the minority Roma community in the Western Balkans where they are subsumed in a general category of "non-majorities" and face exclusion within this category (Zdeb & Vermeersch, 2024).

2.2. Support for HI Redistributive Policies

In this issue, we focus mainly on direct HI-correcting policies (Stewart et al., 2008). In contrast to indirect approaches which aim to reduce HIs through general policies such as universal benefits, direct approaches specifically target disadvantaged groups in a variety of ways. They are sometimes known as affirmative action. They risk increasing the salience of group identities, but they may be necessary to emphasize "the significance of race [or any other salient group] as a source of discrimination" (p. 5), in the words of Ikawa (2024) and assure "equal rights to all in practice" (p. 1); since formal universal rights risk being blind to differences among identity groups. Ikawa (2024) and Sadharwal (2024) focus on attitudes towards affirmative action policies in higher education for Blacks in Brazil, and for Scheduled Castes, scheduled tribes, and "other backward classes" in India. Williams and Bloeser (2024) and Lee (2024) in their contributions compare support across a variety of specific race-targeted policies in the United States and Malaysia. Their results show that affirmative action in employment, and equity ownership in particular, is more controversial than affirmative action in education. Similarly, Burns et al. (2024) show that there is little support for Black economic empowerment among advantaged South Africans. Finally, Kuppens et al. (2024) and Langer et al. (2024) focus on attitudes towards government-led HR in general and show that there are very high levels of support for this type of policy intervention in Kenya and Nigeria respectively. Support levels appeared to be considerably lower in all other contexts studied in this thematic issue. What is more, across these contexts, calls to replace direct policies with indirect—needs-based or economic-based—approaches, such as universal antipoverty programs or progressive taxation, were clearly gaining ground. Yet, such false binaries, Lee (2024) convincingly argues, unduly reduce the debate to continuing vs terminating direct approaches, while implementing them *alongside* indirect approaches would have true potential to systematically and constructively safeguard *all* citizens' well-being and rights.

Successfully reducing socio-economic inequalities is not an end point, however, as the case of Northern Ireland illustrates. As socio-economic redistributive policies wound down, cultural reforms were increasingly contested: The new claim to respect each culture clashed, in the perception of Protestant unionists, with the loosening of practices linking the Province to the British state and its institutions (Todd, 2024).

2.3. "Winners" and "Losers" of Redistribution: How Within-Group Differences Mediate the Effect of Group Position

Clearly, not all groups in society stand to gain from direct approaches, thereby creating "winners" and "losers." Much like the "median voter hypothesis," which argues that support for vertical or needs-based redistribution will be higher among individuals who earn less than a country's median income, group position theory hypothesizes that support for HR varies between members of beneficiary and non-beneficiary groups. HR may potentially trigger resentment and social tensions among members of advantaged groups who fear losing their relative advantage and thereby enhance social tensions.

Nearly all contributions in this issue confirm that material group self-interest is at play at least to some degree. Support for affirmative action in higher education in India, for instance, is lowest among higher castes (Sadharwal, 2024), while Nigerians who considered their ethnic group to be relatively poorer than others were more likely to support HR (Langer et al., 2024). The relation is complex, however. In Kenya, support for HR among historically privileged group members only decreased compared to more disadvantaged groups when advantaged members themselves experienced some sense of political exclusion (Kuppens et al., 2024). And, even though racial sympathy—i.e., white distress over the circumstances of racial outgroups—only translates into support for race-targeted policies among white Americans with higher incomes, Williams and Bloeser (2024) find that the share of whites in economically vulnerable situations who express racial sympathy is similar to better-off group members. Perceptions of advantage are relative, however. While selected for participation because of their advantaged, middle-class status, white focus group participants in South Africa denied their privilege by positioning themselves as "the-middle-of-the-middle" (Burns et al., 2024).

2.4. Determinants of Attitudes Towards Redistribution

Attitudes and perceptions regarding the (historical) circumstances of disadvantaged groups certainly matter, not only in the United States. Statistical analysis of attitudinal data from Nigeria and Kenya show that support for HR is stronger among people who believe that the causes of inequality are beyond, rather than within, a group's control. Such beliefs can even supersede groups' economic self-interests, as was the case in Kenya. More generally, the Nigerian survey data showed that the more people considered group inequalities to be unfair, the more they supported HR. Relatedly, historical analysis in Brazil describes how race-based policies followed the societal uptake of the counter-narrative of the Black movement that debunked the formerly hegemonic myths of gentler slavery and racial democracy, and fully acknowledged Brazil's history of brutal slavery and structural racism instead (Ikawa, 2024). In contrast, when people *believe* that the causes of inequality revolve around certain internal traits of group members, usually expressed through outgroup prejudices or stereotypes, with feelings of in-group superiority, support for HR is likely to be low. White middle-class South Africans, for instance, attributed poverty among their Black compatriots to the "psyche of dependence" (Burns et al., 2024). This can create a vicious circle: Zdeb and Vermeersch (2024) explain how a lack of effective policies targeting Roma in the Western Balkans can be traced back to, and in turn reinforces Romaphobia, further isolating them.

3. Avenues for Future Research

While the contributions in this thematic issue yield many insights for improving understanding of support for HI-reducing policies in diverse contexts, we identify three areas of research that require further theorizing and empirical research.

First, we argue that there is a need to develop common measures of HR to improve comparability across country contexts. Whereas Langer et al. (2024) and Kuppens et al. (2024) used generic measures to assess support for direct redistributive policies which did not explicitly specify the beneficiary group, Williams and Bloeser (2024) used four specific measures aimed at improving the socio-economic position of Black Americans in particular. Sadharwal (2024), for her part, measured opposition to, instead of support for, HR. The use of different measures prevents us from drawing strong conclusions regarding the role of a country's context. Developing comparable measures would also contribute to a better understanding of how salient group characteristics, such as demographic size and intra-group inequality, affect support for redistribution across contexts.

Second, both quantitative and qualitative contributions show that there is a plethora of explanatory variables that remain underexplored. Sadharwal's (2024) work, for instance, points to the relevance of inter-group contact, and Williams and Bloeser (2024) expose the importance of political ideology and institutional trust. In the focus groups of Burns et al. (2024) too, institutional trust was crucial in understanding advantaged South Africans opposition to governmental-led HR, as well as perceptions of corruption and inefficacy.

Third, more attention needs to be paid to changes over time and their relation to the political climate, political power, and the prevalent discourse. In their discussions, Ikawa (2024) and Williams and Bloeser (2024), for instance, reflect on the relevance of their findings in light of the Bolsonaro and Trump presidencies during which support for HR dwindled. Support for group-based redistribution is not just a matter of the views of the person or political party with political power, but dominant values and opinions in society at large as Ikawa (2024) showed. A much-underresearched area is an exploration of the factors that influence these values, which may include political leaders, media, and grassroots movements, among others. These factors work at local, national, and global levels.

Funding

We are grateful for the generous project funding (G068320N) from the Research Foundation–Flanders (FWO) as well as KU Leuven's Internal Funds (C14/20/0727).

Conflict of Interests

The authors declare no conflict of interests.

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