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**Entangled Inequalities, State, and Social Policies in Contemporary Brazil**

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# Entangled Inequalities, State, and Social Policies in Contemporary Brazil

Sérgio Costa

## Abstract

In line with developments observed in several Latin American countries, inequalities in Brazil have significantly declined since the Workers' Party, PT, came to power in 2003. During the two administrations of former President Lula da Silva (2003-2006 and 2007-2010) and the first administration of President Dilma Rousseff (2010-2014), economic growth, improvements in labor market, progress in deprived regions and pro-poor policies interacted positively as drivers of inequality reduction. But due to the recent economic stagnation and political instability, Rousseff, in her new administration (2015-2018), is facing serious difficulties in sustaining the social gains obtained during the last twelve years. It seems that continuing the progress in inequality reduction in times of low economic growth requires deeper structural changes such as a progressive tax reform in order to effectively redistribute resources from the rich to the underprivileged classes. This paper discusses recent developments in Brazil from the perspective of entangled inequalities, a concept applied here with the objective of enlarging the narrow definition of inequality brought forward by hegemonic scholarship. After a brief introduction into the conceptual framework of entangled inequalities, the paper presents, in its second section, an overview of recent changes in Brazilian social structure. The third section discusses the role of the Brazilian state in reducing inequalities. Finally, recent developments in Brazil with regard to the entangled inequalities framework are assessed.

**Keywords:** entangled inequalities | Brazil | social policy

## Biographical Notes

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(2014); "Protection without Redistribution? Conceptual Limitations of Policies Meant to Reduce Inequalities Concerning Race and Gender in Brazil", in: Fritz, Barbara and Lavinias, Lena (eds.), *A Moment of Equality for Latin America? Challenges for Redistribution*, Farnham: Ashgate, 235-252; and with G. L. Gonçalves "The Global Constitutionalization of Human Rights: Overcoming Contemporary Injustices or Juridifying Old Asymmetries?", in: *Current Sociology*, Special issue, January 2016.

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## 1. Introduction: Entangled Inequalities<sup>1</sup>

As a topic dating back to the very beginnings of sociology and economics, social inequalities have been subject to a wide array of definitions backed for different analytical and political purposes. In the past decades, neoclassical approaches rose to prominence both within the disciplinary field of economics and leading international organizations such as UN development agencies and the World Bank. This, in turn, resulted in a specific definition of inequalities that is dominant in international academia and politics alike: According to this interpretation, social inequalities refer to asymmetric individual chances to access socially valuable goods. Consequently, individual income differences within national borders as measured by the Gini index have become the central instrument to measure inequalities.

This narrow definition of inequalities presents practical advantages insofar as it offers a measurable basis for comparisons between individuals and national societies. However, it does not adequately take into account other crucial dimensions of inequalities as captured by more complex conceptualizations. Recent objections to this narrow definition can be classified into four groups related to the interest in researching inequalities: Inequalities (1) of what, (2) between whom, (3) when and (4) where?

### 1.1 Inequalities of What?

A focus on inequalities of chances implicitly or explicitly rests on a liberal assumption according to which social positions in modern societies are solely or mainly determined by individual achievements. Therefore, if individuals have similar social opportunities, disparities in their life conditions allegedly reflect differences in terms of their individual effort. This supposition has been largely criticized by authors demonstrating that ascriptions concerning gender, race, ethnicity, and social prejudices remain relevant for individual opportunities of social mobility – also in contemporary societies. Therefore, these authors recommend shifting the focus from opportunities to results or final positions in social structure (Kreckel 2004; Therborn 2013).

In addition, several contributions emphasize the relevance of power asymmetries regarding political rights, social entitlements, etc., as well as socio-ecological disparities (unequal access to a healthy environment, exposure to ecological risks, etc.) as

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important additional dimensions of inequalities not incorporated by a narrow focus on socio-economic inequalities (Kreckel 2004; Berthe and Ferrari 2012).

## 1.2 Inequalities between Whom?

Using concepts and references such as horizontal inequalities (in contrast to vertical inequalities; Stewart 2010), categorical inequalities (Tilly 1999) and intersectional inequalities (Anthias 2013), various authors stress the importance of researching inequalities not only between individuals but also between groups defined by social ascriptions. As summarized by Tilly,

[L]arge, significant inequalities in advantages among human beings correspond mainly to categorical differences such as black/white, male/female, citizen/foreigner, or Muslim/Jew rather than to individual differences in attributes, propensities, or performances (Tilly 1999: 7).

Today, more than fifteen years after the publication of Tilly's seminal book on durable inequalities, several studies in a variety of fields have demonstrated the importance of intermediate categories, between and within the seemingly binary constructions Tilly used, in determining social inequalities. For example, it has been shown that within the categorical pair citizen/foreigner one can identify key series of gradations such as the legal status of immigrants, their country of origin, etc., that determine their rights and possibilities, varying significantly among "foreigners" (see, for example, Góngora-Mera et al. 2014). Moreover, the temporal aspect is often neglected: Positions and labels adopted by individuals or groups may vary considerably over time, with groups who defined themselves as peasants later identifying themselves as indigenous or of African origin. That is to say that persistent inequality affecting similar demographic groups may be expressed by different categories (e.g. peasant, indigenous, indigenous women, etc.) in different historical circumstances (see Costa 2012). Aside from that, definitions such as categorical inequalities or horizontal inequalities remain analytically useful because they reinforce the importance of social ascriptions in stabilizing inequality patterns. In particular, intersectional approaches, for their part, have convincingly shown that positions in social structures always derive from complex interplays of categorizations of race, gender, class, etc.

### 1.3 Inequalities When?

Economists usually study inequalities from a synchronic, contemporary perspective paying no attention to the fact that existing social structures reflect necessarily long-time historical processes (López-Calva and Lustig 2010).

Since the paradigmatic contribution of Tilly (1999), different studies sought to enlarge their temporal perspective in order to unpack the historical formations of inequality structures, as exemplary developed by Baquero Melo (2015) with the concept of layered inequalities.

### 1.4 Inequalities Where?

While conventional scholarship researches inequalities on a local or national scale, new approaches seek for understanding inequalities with a widened angle in order to capture transnational and global entanglements that shape local and national social structures. There are two main approaches which have recently dealt with inequalities from an amplified perspective: While transnationalism (see, for example, the contributions assembled in Weiß and Berger 2008) is interested in understanding how different national social structures interact, for instance in the case of social positions of migrants, world systems approaches are rather concerned with macro-structural persistent inequalities (see, for instance, Korzeniewicz and Moran 2009). In accordance with these new developments in the field of inequality research, *desiguALdades.net* – the Research Network on Interdependent Inequalities in Latin America – coined the concept of *entangled inequalities*<sup>2</sup> understood as distances

[...] between positions of certain individuals or groups of individuals in a relationally (not spatially) determined context. This concerns economic positions (defined by income, access to resources and so on) as well as political and legal entitlements (rights, political power etc.). In order to understand the linkages from which unequal positions arise, it is necessary to have relational units of analysis that are dynamically defined in the process of inquiry itself. In a similar way, the interplay of social categorisations (gender, race, class, ethnicity etc.) cannot be articulated ex-ante in a formula. It can only be studied in the respective specific context (Costa 2011: 21).

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2 The use of the expression entangled inequalities is inspired by discussions on entangled modernity as developed by Conrad and Randeria (2002). A more detailed discussion on the concept entangled inequalities is developed in Costa (2011), Lillemets (2013), Braig et al. (2015).

This concept of entangled inequalities constitutes a general framework used in this paper to analyze recent changes in Brazilian social structure.

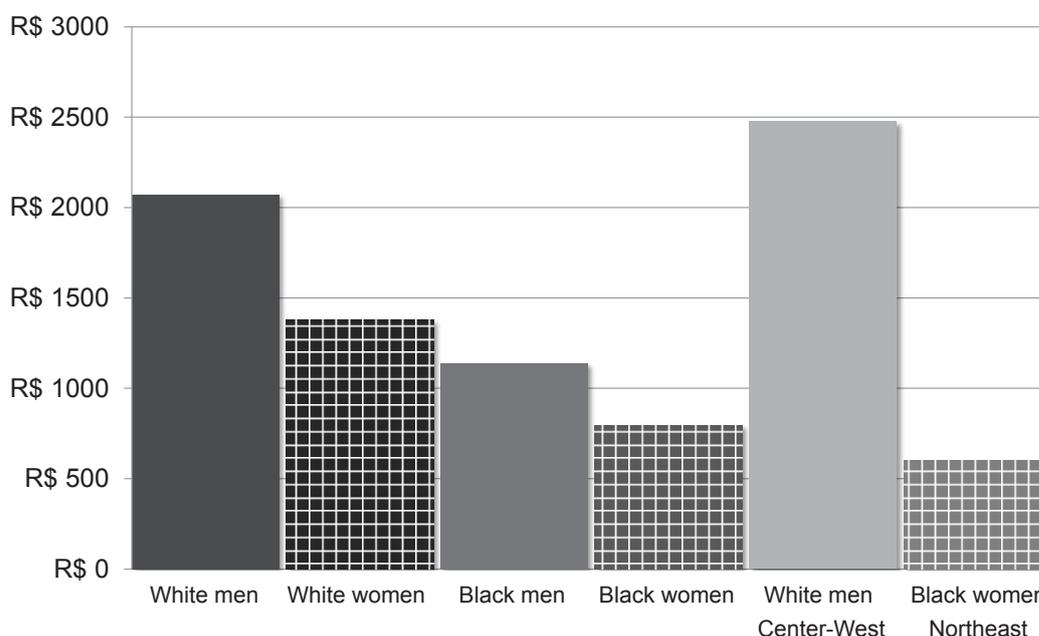
## 2. Inequalities in Brazil: Recent Developments

Since the Workers' Party (PT) came to power in 2003, remarkable economic and social improvements have been reached in Brazil. Between 2002 and 2013, GDP per capita has increased by 64 percent, the percentage of Brazilian population living below national poverty line declined from 48.4 to 23.9 percent of the total population, and social policy expenditures rose from 12.7 to 16.8 percent of the Brazilian GDP (Bielschowsky 2014; CEPAL 2014). In the same period, the Brazilian labor market underwent an auspicious change as unemployment rates declined from 11.7 to 5.4 percent among the economically active population while the formal employment rate has impressively increased from 49.7 percent in 2003 to 71.4 percent in 2012.

It was also between 2002 and 2013 that income inequality as measured by the Gini coefficient decreased from 0.59 to 0.53. Yet despite this improvement, the Brazilian Gini coefficient for income is still above the Latin American average of 0.486. With the richest quintile possessing 53.6 percent of all income, Brazil also remains the most unequal Latin American country when it comes to income concentration by upper classes (as a comparison, this rate amounts to 36.4 percent in Latin America's least unequal country, that is Uruguay; see CEPAL 2014).

Concerning inequalities related to racial and gender categorizations, they remain at a high level, but there has been also an important reduction of income asymmetries during the administrations led by the Workers' Party. In 2002, women's total average income represented only half of the male average income, while in 2012 this proportion rose to 58 percent. A similar change can be observed for racial income asymmetries: In 2002, the average income among Blacks corresponded to 47 percent of Whites' average income. Yet in 2012, this proportion amounted to 55 percent (IBGE 2012). A similar tendency can also be observed in the case of regional inequalities since the Northeast, Brazil's poorest region, has recently experienced more development than other regions. But regional inequalities still matter, especially if combined with gender and race related asymmetries, as the figure below illustrates quite well:

**Figure 1: Average Monthly Earnings in Brazil, 2012<sup>3</sup> – The Intersection of Inequality Factors: Sex, Race, and Region (Figures in Brazilian Reais as of September 2012)**



Source: Data from IBGE 2012 for selected groups.

Different analysts of Brazilian social structure state that the recent reduction in inequalities is rather a consequence of economic processes (such as increasing prices for commodities in international markets and decreasing salary gaps between highly skilled and less qualified workers) than of social policies. Accordingly, social policies based on cash transfers have a crucial impact on poverty reduction, but they are seen to be less effective for promoting redistribution (Gaulard 2011; Lavinás 2013; Lustig et al. 2013).

Analysts also question the sustainability of the decrease in inequalities in Brazil given the current adverse confluence of modest (or even negative) economic growth, “premature” de-industrialization, a “reprimarization” of exports and falling commodity prices.<sup>4</sup>

3 Average earnings from the main occupation of the population over 16 years old.

4 Economists use the expression premature de-industrialization (*desindustrialização precoce*) to refer to the current process of abrupt declining participation of industrial production in Brazilian GDP, a phenomenon that appears before the industrial sector is fully consolidated. Accordingly, de-industrialization is motivated by a combination of a persistent overvalued currency (this situation has only changed within the economic and political crisis of 2015) leading to a stimulation of import of industrial products, high rates of interest which discourages industrial investments, and low level of foreign investment. “Reprimarization” refers to an increasing participation of agrarian and mining products in exports (Cano 2012; Costa et al. 2015).

### 3. The (Re)distributive Impact of State Intervention

States remain key actors for promoting the mitigation of domestic inequalities created by economic interactions in capitalist societies – at least at the domestic level. Fiscal policies, including tax and social policies, and the offer of public and quasi-public goods represent classical instruments used by states to intervene in inequality structures. States can also intervene indirectly through measures – such as the introduction or increase of minimum wages – which lead to a redistribution in favor of low paid-workers.

Comparisons of the Gini coefficient before and after tax deductions and state transfers in different countries give a sense of how states use their redistributive power with very different intensities, as shown by data compiled by the World Bank (2014). Accordingly, the Gini coefficient before taxes and transfers in European OECD countries and in the Latin American countries is virtually identical. However, the final Gini coefficient, i.e. after state's intervention through fiscal policy, is much higher in Latin American countries than in Europe. A comparison between two OECD countries, France and Mexico, makes this general tendency clear: The Gini coefficient in both countries before taxes and transfers is about 0.50. After fiscal policy, the French Gini coefficient decreases to 0.30; in Mexico it remains very high: 0.48.

Hence, Latin American states lack the power to strongly reduce market-produced income inequalities. In European countries, state interventions use to mitigate income inequalities by up to fifty percent as, for instance, in the case of Slovenia and Norway (see World Bank 2014: 27). Although distinctive patterns of state transfers (comprehending how much and for whom the state invests its resources) partly explain these contrasting results of state intervention between Europe and Latin America, the pivotal difference lies in the tax structures which are much more progressive in Europe than in Latin America.

In the case of Brazil, overall tax collection did in fact increase from 31.8 percent of the GDP in 2003 to 35.9 percent in 2012, exceeding thus the average number of OECD states which is 34.6 percent (Castro 2014). However, the composition of tax revenues in Brazil differs substantially from that of those countries which are more effective in diminishing inequalities. While indirect taxes, which are regressive,<sup>5</sup> represent 49.7 percent of all collected taxes in Brazil, they held a much lower share of all collected

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5 The regressive character of taxes associated with consumption derives from the fact that underprivileged classes spend a much greater proportion of their income on consumption than rich families do. Using data from 2008, IPEA (2009) calculated that while families with an income of up to twice the minimum wage spent 53.9 percent of their income paying taxes, those receiving more than thirty times the minimum wage spent 29 percent on their taxes. The minimum wage corresponds to about US\$ 266 per month (according to the exchange rate of November 4<sup>th</sup>, 2015).

taxes in European countries such as Germany (29.2 percent) and Norway (27.3 percent) (Castro 2014; data for 2012 from European Union 2014). In Brazil, the current composition of tax revenues has not varied substantively since the Workers' Party took office in 2003<sup>6</sup>. This is also true for other regressive characteristics of the Brazilian tax system such as the lack of a tax on dividends (in Western European countries this taxation varies from 25 percent in Belgium to 42 percent in Denmark) and the low taxation of high incomes (in Brazil the highest income taxation is 27.5 percent, whereas in Sweden, for instance, it amounts to 56.6 percent).

This tax collection structure is also unable to change the concentration of wealth encompassing properties and entitlements. Based on the analysis of more than 25 million tax declarations, Castro (2014) concludes that only 406,064 tax payers (0.2 percent of the Brazilian population) possess about 47 percent of Brazil's wealth. Also, he calculates the Gini coefficient for wealth which has remained practically stable since 2006, namely around the extraordinarily high value of 0.85!

As far as income concentration is concerned, Castro simulates different changes in Brazilian taxation system and concludes that "merely" introducing a taxation of 15 percent for capital and financial profits combined with tax rates of 35 and 40 percent for high salaries could reduce the Gini coefficient by about 20 percent (Castro 2014). This would be more than what was achieved during the twelve years of PT administrations, the most successful period in terms of inequality reduction in Brazilian history.

All in all, social policies recently implemented in Brazil have had a low impact on inequalities compared with the redistributive potential of the tax reforms outlined above. In order to assess the impacts of diverse strategies adopted by PT administrations, three policies will be discussed below: (1) Bolsa Família, (2) quotas at federal universities, and (3) a minimum wage.

### **3.1 Cash Transfer Program: Bolsa Família**

As soon as the PT came into power, this program of direct cash transfers to poor families with schoolchildren became the most outstanding feature of PT administrations. While a previous program created during the former administration of Fernando Henrique Cardoso (1995-2003) provided benefits for 3.6 million families in 2002, the Bolsa Família benefited 14.1 million families with amounts of about R\$ 142 in 2013 (see

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<sup>6</sup> This contrasts with PT's electoral program of 2002, according to which: "The first reform to be faced by the new administration, during its very first year, will be a tax reform whose aim is improving economic efficiency and reducing social inequalities" (PT 2002: 14, translated from Portuguese by the author) .

Bielschowsky 2014). Bolsa Família's main recipients are women (93 percent) and Blacks (73 percent).

Bolsa Família has played a pivotal role in reducing poverty in Brazil, although its costs are modest: Financed by public funding representing only 0.5 percent of the Brazilian GDP, the program reaches 25 percent of the Brazilian population. Nevertheless, Bolsa Família has a negligible relevance for mitigating income inequality: Bolsa Família and other cash transfer measures merely respond to 1 percent of the Gini coefficient composition (according to Medeiros et al. 2013; see also Lavinás 2007, 2013).

### **3.2 Quotas at Federal Universities**

Although some policies had been already introduced by previous governments, the Workers' Party implemented a broad set of new policies to mitigate inequalities associated with gender and racial ascriptions. To accomplish this, two extraordinary agencies with ministerial status were also created in 2003, one for policies targeting women (SEPM) and another for policies promoting racial equality (SEPPIR). As shown elsewhere (Costa 2015), most of the measures implemented concentrate on combating discrimination which is only one among several mechanisms at work in the reproduction of racial and gender asymmetries. Additionally, the measures adopted reach only a small fragment of black or female Brazilians. The quota program introduced in Brazilian federal universities in 2012 is one such case.

According to the program, 50 percent of all study placements at federal higher education institutions are to be reserved for students graduating from public schools and allocated according to the proportion of the black and indigenous populations living in the respective region. Yet, when taking into account that in 2013 only about 1.1 million of all 7.3 million undergraduate students in Brazil were enrolled at federal institutions (INEP 2014), and when also considering that Blacks and Indigenous represent about 51 and 0.5 percent respectively of the whole Brazilian population, then it is clear that the federal quotas program, if fully implemented, will only distribute approximately 283,000 university places according to racial/ethnic criteria. Therefore, the program, because of its design, benefits a very small group among the more than 100 million Blacks and 800,000 Indigenous living in Brazil, producing only minimal socio-economic aggregate effects. Of course, this fact does not delegitimize the program because it has an obvious relevance for setting the imperative of overcoming racism in the core of Brazil's political agenda. Nevertheless, its impact for promoting socio-economic redistribution in favor of the black or indigenous population as a whole is marginal.

### 3.3 Minimum Wage

In response to consistent political pressure articulated by national associations of trade unions, the Brazilian government has readjusted the minimum wage in real terms consecutively since 2003. Since 2008, the adjustments have been coupled by law to inflation and the economic growth rate of two years prior to the increase. This policy has led to a real increase in the minimum wage by 75 percent between 2002 and 2013 and is seen as the most important driver of the recent decline of inequalities in Brazil (Sabóia 2012; UNDP 2014). There are multiple factors explaining the redistributive effects of the minimum wage:

Since about 70 percent of Brazilian workers have an income of less than double the minimum wage per month, a real increment of minimum wage automatically leads to an improvement of well-being for a significant part of the population (DIEESE 2014).

The rise in minimum wage reinforces the bargaining power of workers whose salaries are not coupled with the minimum wage and even for informal workers the minimum wage serves “as a benchmark for individual wage negotiations” (Berg 2012: 8).

The automatic readjustment of lower pension values to the minimum wage results in real income improvements for the elderly and their families in the lower classes.

Since women and Blacks are overrepresented in low-wage labor sectors such as domestic work, which are directly governed by the minimum wage law, real increases of the minimum wage contribute to reduce inequalities in terms of gender and race (IPEA 2013).

Although the cabinet of President Dilma Rousseff decided in January 2015 to extend the current minimum wage adjustment policy, recent (and expected) very low or even negative economic growth rates will lead necessarily to a stagnation of real minimum wages with adverse consequences for redistribution in both terms: class, as well as gender, and race.

## 4. Conclusion: Entangled Inequalities and Recent Developments in Brazil

If the general framework of entangled inequalities is applied to assess the recent decline of inequality, certain ambivalences in this process stand out. At the level of income differences, social distances did become a bit smaller. However, this does not necessarily lead to a less unequal access to “socially-relevant goods” since wealth concentration remains virtually unaffected, and access to public and common goods such as a healthy environment and a well-functioning urban traffic system may have become even more unequal.<sup>7</sup>

The assessment of power asymmetries as a key aspect of the entangled inequalities approach is a complex endeavor due to the fact that transparent indicators for measuring power asymmetries are not available. In general terms, it can be stated that the PT administrations have not represented a radical power shift in favor of the working and lower classes. Otherwise, these administrations would have reformed the regressive tax system targeting capital and financial profits. Notwithstanding, some particular groups – especially women and Blacks, as well as the extremely poor – have been empowered insofar as their claims have been inserted on a large scale into the political agenda, being addressed by compensatory policies.

The dynamic of inequality reduction in Brazil speaks in favor of an intersectional approach able to integrate the complex entanglements between the varieties of inequalities concerning class, racial, gender and regional ascriptions. It has been shown above that since class, gender and racial disadvantages interact, policies aimed to reduce class inequalities such as Bolsa Família or a minimum wage bring more improvements for much more Blacks and women – at least at the level of income – than policies exclusively designed to reduce gender and racial asymmetries accumulated throughout history.

Finally, it should be mentioned that this paper does not directly assess the transnational and global aspect although it is of great importance when researching entangled inequalities. This neglect is due to this paper’s focus on policies within a specific

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<sup>7</sup> Although this paper does not address access to public and common goods, the topic is mentioned here in order to illustrate some implications of using the entangled inequalities approach. Moreover, several studies indicate that the access to public and common goods has become increasingly unequal in contemporary Brazil. The case of access to transportation and a well-functioning traffic system is a striking example: Between 2003 and 2013, the amount of registered vehicles in Brazil jumped from about 37 million to about 82 million (DENATRAN 2015). This has triggered a rise in traffic accidents with fatal victims especially among pedestrians and motorcyclists, those road users with lower incomes (Bacchieri and Barros 2011).

country. Nevertheless, the nexus between Brazil's involvement in the global economy including "reprimarization" and a low level of foreign investment, on the one hand, and changes in the country's social structure (transformations in labor market) may have become evident. Furthermore, changes in domestic politics (such as the adoption of cash transfer policies in accordance with different international organizations and the introduction of gender and race related policies following correspondent UN summits) are obvious results of transnational and global interdependencies which are the subject of further investigations.

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