Dimensions of equity and social justice in Latin America and Brazil

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Introduction

In a world that claims to value equality, inequality persists and in many ways is even growing, despite the ethical and pragmatic challenges it poses to social, political, and economic life dimensions. Yet, progressive movements, driven by ideals and interests, emphasize the importance of equity and justice. Such tension between ideals and realities translates into trajectories that, in a long-term perspective, have shown clear progress in the fight against multidimensional inequalities, but also slowdowns and even retrocession is marked by sharp variations between countries and regions of the world, and there are no reasons to maintain that progress is the teleological thread of history. Even established redistributive efforts can be slowed down or hampered, negatively impacting real people's lives, as the widening of intranational income inequalities and the democratic recession observed in recent history make evident.

Before we focus on Latin American distribution patterns of material and/or symbolic resources in recent decades, a brief digression might be useful to put the notion of equality, and its relational opponent inequality, into a historical context. We consider it relevant to observe that although there are competing analytical approaches, they are all framed in the cultural universe that emerged in early modernity, which replaced the notion of difference with the new concept of "inequality."

Indeed, the concept of equality, along with freedom and fraternity enthroned by the French Revolution, signals a departure from the idea that equality should be limited to those who share a common status. Instead, the new revolutionary equality idea was introduced by opposing to it the new notion of inequality. This signaled a significant cultural change. The new understanding of equality condemned inequality morally, unlike the previous concept of difference which conceived of social distance as intrinsic status characteristics. And although the initial demand for equality was driven by the bourgeoisie's opposition to the privileges of the nobility, the claim of universality associated with the notion keeps feeding the fight against various forms of exclusion and injustice.

In other words, despite the persistence of inequality and the rise of inequality indexes, egalitarian ideas and movements have spread globally and remain cherished cultural values. While disagreements persist about the definition and extent of equality, its liberating component continues to be a powerful instrument for advancing justice. Even those – including the political and economic elites – who oppose the principle of equality rarely openly reject it as an ideal. Arguments in favor of inequality often rely on utilitarian reasoning rather than outright rejection of equality as a social moral value.

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In recent decades, assessments of equality/inequality have expanded beyond income and wealth distribution to include multiple aspects, such as health and education. Amartya Sen's capabilities approach, which incorporates empowerment and the allocation of political, social, and cultural resources, has played a significant role in broadening the understanding of equality. At the same time, difference has emerged as a relevant dimension in the equality debate, particularly in what concerns the claims of women and diverse minority groups. Those who demand difference recognition argue that social institutions are structured in ways that favor particular interests over others. The recognition that differences intersect and worsen inequality has gained prominence, making equality and difference complementary dimensions in moral struggles and policies aimed at reducing inequality.

In short, categorical and intersecting differences pose significant obstacles to achieving equality. The awareness of these obstacles has sparked academic and policy debates, expanding the scope of analytical choices to frame inequality. One such inspiring alternative is offered by Therborn (2013). Based upon Sen and Nussbaum's notion of human capability, Therborn distinguishes between vital, existential, and resource inequality. In his words, vital inequality refers to socially constructed unequal life chances of human beings. Existential inequality encompasses unequal allocation of personhood, as he points out, impairing one's "autonomy, dignity, degrees of freedom, and rights to respect and self-development." Finally, resource inequality responds to the unequal distribution of material resources to act (Therborn 2013, 49).

Taking into account the variety of focus mentioned above, in the following section we proceed to analyze Latin America by seeking to operationalize Therborn's three types of inequality and explore how they have evolved in the last decades. First, we compare Latin America's progress and distribution patterns to other continents. Then we point to some relevant variations among countries of the region, inquiring if there are persistent trends toward the reduction of multidimensional inequalities and how they relate to the entangled notion of progress. Finally, we briefly take Brazil as a showcase to highlight how national patterns of income and wealth distribution can remain highly concentrated despite short-term redistributive gains of policies enforced by progressive governments. Singling out the Brazilian experience helps to throw light on the broader scenario observed in Latin America during the early 2000s, the so-called pink wave, when the subregion experienced a reduction in inequality indexes, which soon reverted as the political and economic winds changed.

In any case, given the pendular movement across the ideological spectrum that has characterized Latin America, identifying dimensions of inequality may offer an opportunity to observe if the continuous shift between left- and right-wing orientation in growth and redistributive policies has been translated into advances or setbacks in other than material dimensions of inequality.

The distribution puzzle

Looking at the evolution of social distribution, three relevant factors are: (*i*) how distant is our comparative past; (*ii*) what dimension of inequality we are looking at (economic, political, gender, etc.), and; (*iii*) what geographic areas are under comparison (intranational or international, for example). Depending on which of these aspects we select, an analysis of 50 years can portray different images and interpretations of how things evolved. For example, inequality in the appropriation of world income (let us say, a global Gini) suggests that inequality between nations has been declining since the 1980s – largely due to the rise of China – more so than intranational inequality (Milanovic 2023). In the same period, inequality increased sharply in Europe and the US, while Latin American countries show an improvement, considering the decline in the Gini index from .53 in 2001 to .46 in 2014, but stagnate between 2014 and 2018 (UNDP 2021). Meanwhile, if we look specifically at access to citizenship rights, Latin America shows clear progress in the period.

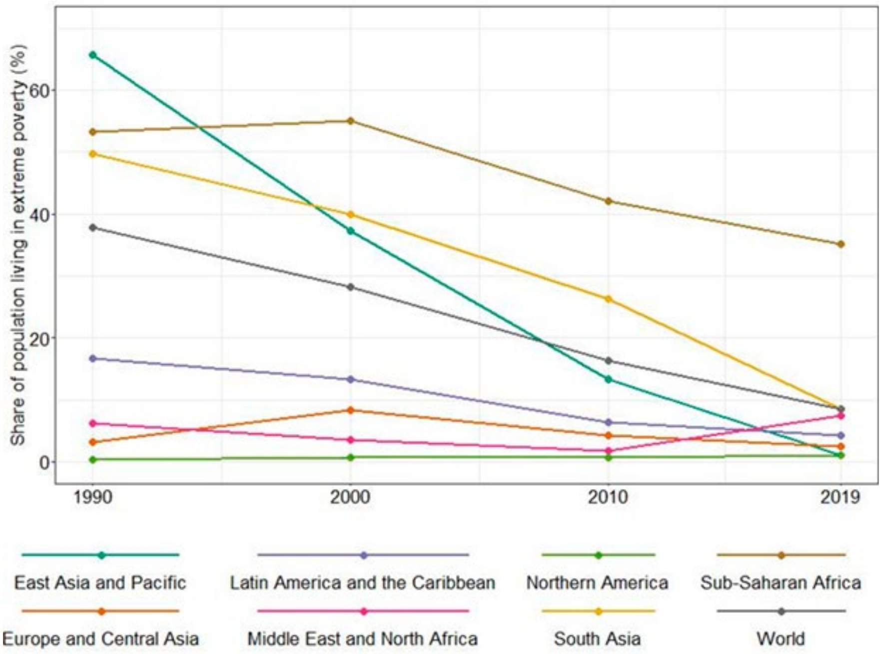
We use datasets from five different sources to map how inequality has evolved in Latin American countries compared to other world regions in the last decades. Building upon Therborn's (2013) typology of inequalities, we selected a set of five indicators aggregated to the world region and country levels (Table 1).

Table 1. Dimensions, indicators, and data sources

Dimension	Indicator	Source
Vital inequality	Infant mortality rate	United Nations – Population Division (2022)
Resource inequality	Top 1% pre-tax share of national income	World Inequality Database (2023)
	Number of people living in extreme poverty	World Bank (2023)
	Average years of schooling of the adult population aged 25 or over	Lee-Lee (2016); Barro-Lee (2018) and UNDP HDR (2018)
Existential inequality	Gender Inequality Index	UNDP, Human Development Report (2021–22)

Source: Authors' elaboration.

Figure 1. Percentage of people living in extreme poverty – world regions, 1990–2019



Source: World Bank (2023).

The period covering the beginning of the 21st century reveals two trends in global inequality: first, the end of the era marked by the highest levels of global inequality among nations since the Industrial Revolution, with a vertiginous fall in global inequality driven mainly by the rise of Asia, particularly China (Milanovic 2023); and second, a growing intranational *wealth* inequality. The analysis of different dimensions of inequality allows us to understand in what sense we can extend the interpretation of the "great convergence" beyond global income inequality and, in particular, to intra-regional analyses. The first step involves looking at Latin America in this period compared to other world regions.

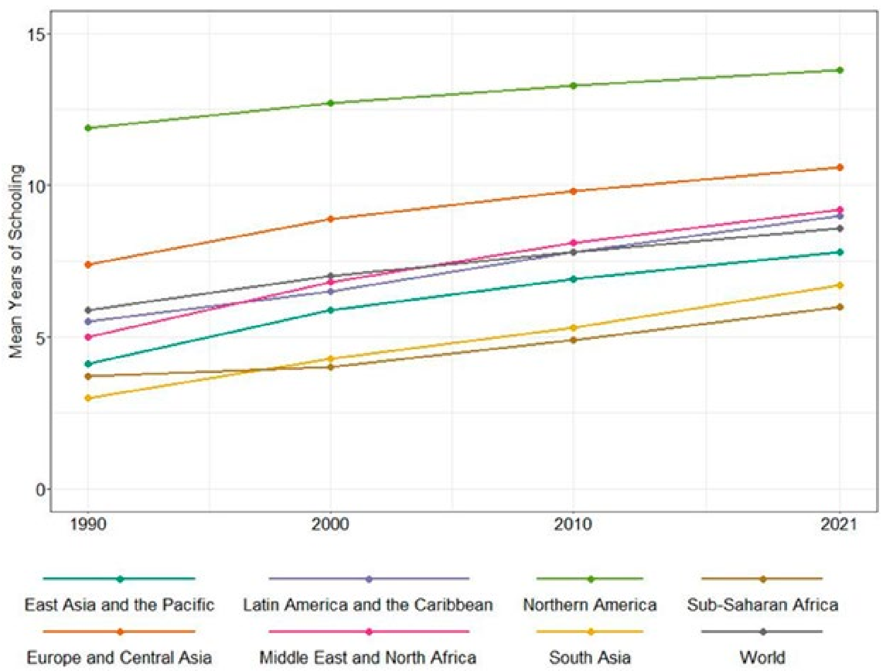
A- Resource inequality

Extreme poverty has fallen substantially over the last 30 years in all regions to levels below 10% of the population in 2019, except for sub-Saharan Africa (35.1%) (Figure 1). The East Asia and Pacific region, led by China, showed the greatest reductions in poverty in all decades, with percentages declining consistently over the period (4.34, 6.42, and 10.2 per year in the three decades, respectively). As a reflection of the gains of the Indian economy in recent decades, South Asia had the second largest relative reduction in the 2010s (67.5%), although it still has the second highest percentage among regions (8.5%) (World Bank 2022).

In Latin America, the trajectory of extreme deprivation reflects the combination of cultural, social, and demographic changes observed in recent decades, and the implementation of public policies aimed at combating poverty. Thus, it is worth observing the reduction in mortality and fertility rates, the increase in life expectancy at birth, the massive entry of women into the labor force, especially among the less well educated, and the expansion of citizenship for Latin American women (Arriagada 2006). Moreover, the broad redistributive programs implemented mainly at the turn of the century in several Latin American countries, such as Bolivia, Brazil, and Mexico, have left their mark: extreme poverty fell at a rate of 5.1% per year in the '00s, just below that of the East Asia and Pacific region as shown in Figure 1.

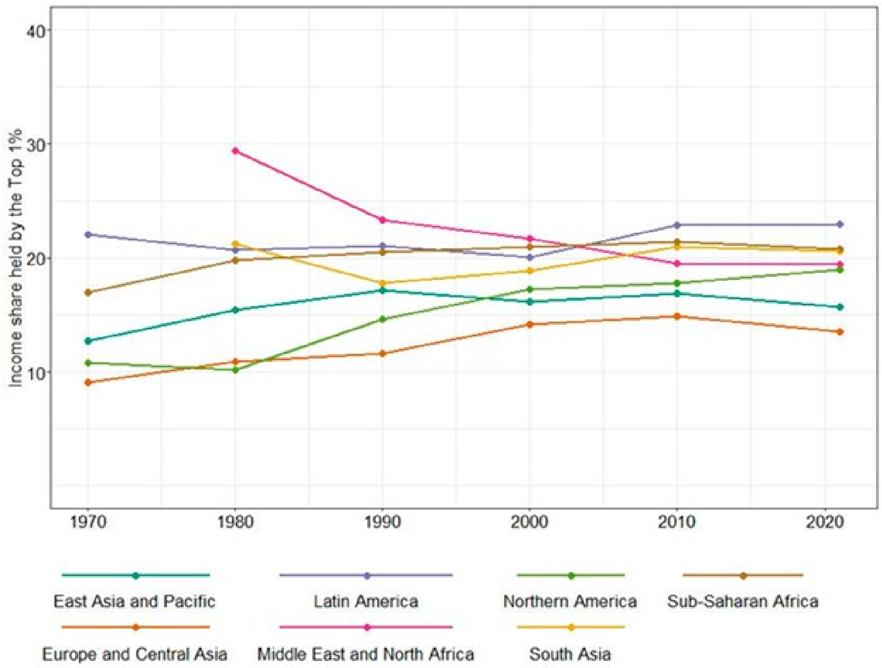
Across the world, large inter-regional disparities persist in schooling indicators, despite massive advances in the expansion of

Figure 2. Average years of schooling of the adult population aged 25 or over – world regions, 1990–2021



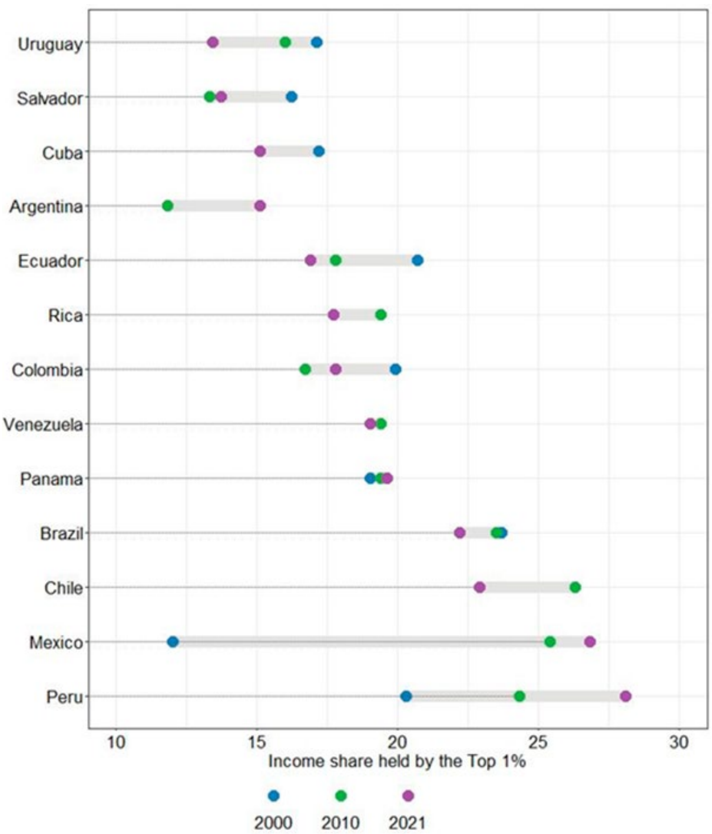
Source: Lee-Lee (2016); Barro-Lee (2018) and UNDP HDR (2018).

Figure 3. Top 1% pre-tax share of national income – world regions, 1990–2021



Source: World Inequality Database (2023).

Figure 4. Top 1% pre-tax share of national income – Latin America and the Caribbean, 2000–2021



Source: World Inequality Database (2023).

education systems in middle- and low-income regions (Figure 2). The first notable pattern is the huge gap that still separates North America from other regions, including Europe and Central Asia, while the gap between the extremes has fallen across the board (12.4%). On average, a North American child stays in school twice as long as children living in South Asia or sub-Saharan Africa. Unlike what we observed regarding extreme poverty, the 1990s was the decade that registered the greatest increase in average schooling in the regions of East Asia and the Pacific (43.2%) and South Asia (43.3%). So how did Latin America fare in this picture?

Although the Latin America and Caribbean (LAC) region showed a substantial increase in average schooling of the adult population in the 2000s and 2010s – with the highest absolute growth in the 2000s (1.3 years) and the second highest in the 2010s (1.2) (Figure 2) – the educational attainment and skill level of its population remain low by international standards (OECD 2020). Its educational system continues to show quite high inequality of opportunities, especially in higher educational transitions. Across the region, standardized assessments of youth and adults, such as the OECD's PISA and Survey of Adult Skills (PIAAC), show average scores substantially below the levels for OECD countries, as well as for other emerging economies (OECD 2020).

The picture looks somewhat more confusing when we analyze income concentration at the top 1% of earners in each world region (Figure 3). We can discern two patterns behind the disparate trajectories: first, all regions have had ups and downs in the level of income concentration over the past half-century, with two exceptions – the Middle East and North Africa, which have presented steady decreases in concentration (with the cautionary note of the lack of public data for 1970), and Northern America, whose income became progressively more concentrated; second, in only two regions, the Middle East and North Africa and South Asia, the top 1% of earners ended the period concentrating less income than when it started. Although Latin American countries were somewhat successful in reducing income concentration until the 1990s, the region underwent a major trend reversal in the first decade of the 21st century, showing the highest income concentration among all regions at the end of the period.

The deterioration of income distribution in both emerging and developed economies, especially after the 2008 financial crisis, has been extensively documented in the literature (OECD 2015; Piketty, Saez, and Zucman 2018; Cavalcante 2020). However, the LAC region stands out as the only one that did not experience the slight decline in income concentration observed worldwide.

Despite the pendular movement of income concentration at the top observed in Latin America, there is remarkable intra-regional heterogeneity in its patterns of change, as well as with respect to the current levels of concentration (Figure 4). It is possible to group Latin American countries into three large groups: (i) countries with a decreasing concentration level or close to the lowest level found in other regions (Uruguay, El Salvador, Cuba and Argentina); (ii) countries that followed divergent trajectories over time and that are below the regional average (Ecuador, Costa Rica, Colombia, Venezuela, and Panama); and (iii) countries with a concentration level higher than the regional average or which have shown a large increase in recent decades (Brazil, Chile, Mexico, and Peru).

B- Vital inequality

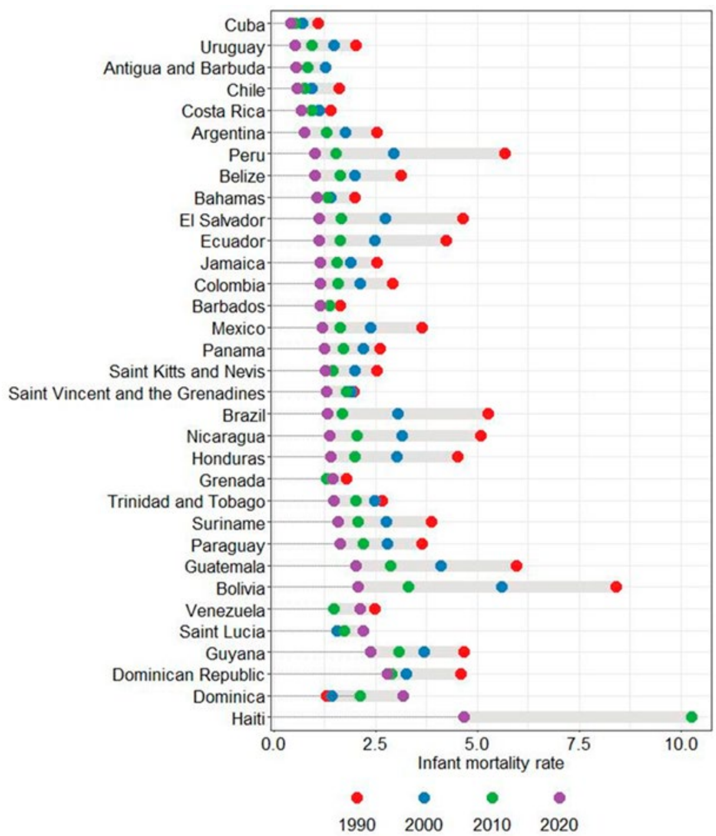
In addition to the components of resource inequality, it is important to consider vital inequality elements which are central to understanding changes in the living conditions of families such as, for example, infant mortality rates. There has been a significant reduction in infant mortality rates since the 1990s in nearly all Latin American countries, although its magnitude varies between them (Figure 5). As discussed by Reis and Lopez (2021), the average reduction was greater in South American countries than in Central America and the Caribbean. Of the 10 countries with the greatest relative decreases in infant mortality, 6 were in the first subcontinent (Peru, Bolivia, Brazil, Ecuador, Uruguay, Argentina, in descending order). The cases of Peru, Bolivia, and Guatemala stand out: from the highest infant mortality rates in 1990, when they paired levels they only observed in sub-Saharan Africa, the three countries experienced the first, third, and eleventh largest reductions, respectively – among them, only Peru has a current rate (1.0) lower than the regional average (1.47).

Although Latin America currently presents the fourth lowest infant mortality rate of the world's regions, we can still find countries with rates close to or above the worst regional averages (South Asia, 2.74, and sub-Saharan Africa, 4.79): Saint Lucia (2.2), Guyana (2.38), Dominican Republic (2.79), Dominica (3.17), and Haiti (4.67). At the other end of the scale, only four countries in the region show rates that place them among the best-positioned world regions (Northern America, 0.51, and Europe and Central Asia, 0.59): Chile (0.58), Antigua and Barbuda (0.54), Uruguay (0.53), and Cuba (0.41).

C- Existential inequality

The trajectory of existential equality indicators shows a more limited inter- and intra-regional convergence, or else an increase in inequalities between countries (Reis and Lopez 2021). Among other available indicators, those related to gender allow us to understand part of the dynamics that more directly impacts the living conditions of families, such as gender-based disadvantage in reproductive health, empowerment, and labor market conditions. These dimensions are taken into account in the Gender Inequality Index (GII), developed by the United Nations Development Programme (UNDP), which is shown in Figure 6. The index ranges from 0, where women and men fare equally, to 1, where one gender fares as poorly as possible in all measured dimensions.

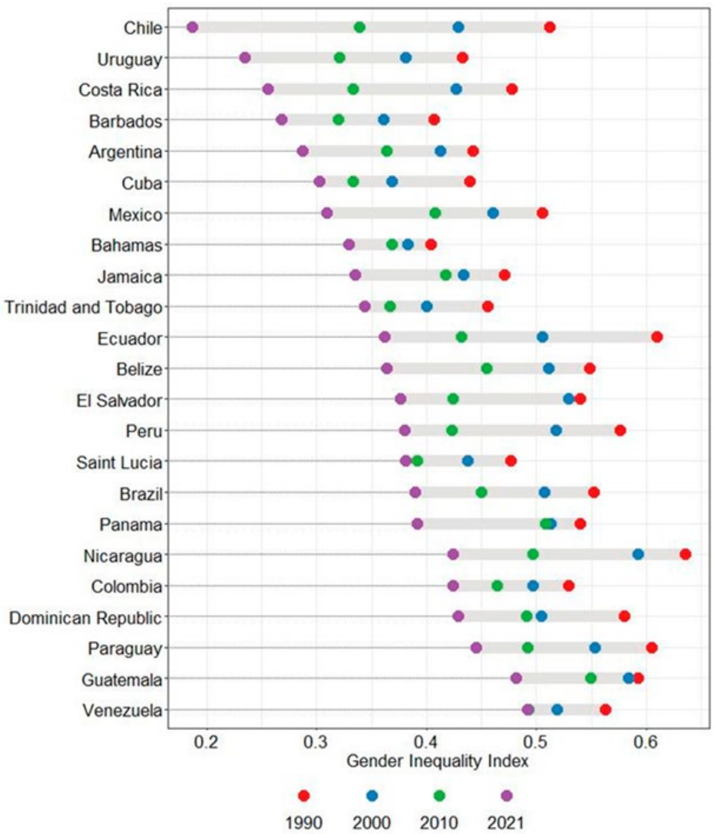
Figure 5. Infant mortality rate – Latin America and the Caribbean (1990–2020)



Source: United Nations – Population Division (2022).

Although the Latin America and Caribbean region has become more gender-equal, we only observe a limited improvement and increased intra-regional inequality. Since 1990, the index has improved by 23.3%, with equality growth greater only than the sub-Saharan African average for the period. Differently from what we found for infant mortality rates, there is no clear lead for South American countries in terms of decline in gender inequality: among the ten most significant gender inequality reductions, six took place in Central America and the Caribbean. But other LAC societies have had some success in reducing gender inequality, including Chile (63.5%, the largest reduction in the region), Uruguay (45.7%, the third largest) and Ecuador (40.7%, the fourth largest). On the other hand, despite the generalized, yet limited, reduction of gender inequality in the region, intra-regional inequality in this indicator increased over the period (SD = 0.068 in 1990; SD = 0.0891 in 2021), with a group of countries showing values around or above the regional average of two decades ago (0.48): Honduras, Guatemala, Guyana, Paraguay, Venezuela, Haiti.

Figure 6. Gender Inequality Index – Latin America and the Caribbean (1990–2021)



Source: UNDP, Human Development Report (2021–22)

Wealth concentration, inequality, and social cohesion

The evidence above shows progress toward vital, existential, and material equality in most Latin American countries. However, as observed in other parts of the world, unprecedented material progress and poverty reduction did not translate into lower vital, existential, or material inequality levels, as the share of the poorer remains persistently much lower (Chancel et al. 2022).

The general picture that emerges from the Latin American region shows great intranational dissonance between expanding material prosperity and skewed distribution of the gains observed across social segments. For example, the national income appropriated by the top 1% of the population in the region rose from 19.9% to 23.4% from 1995 to 2021 (WID 2023).

There is also a clear upward trend of growing intranational wealth inequality from the beginning of the 2000s when pro-redistribution governments took over the region during the so-called Latin America electoral pink wave. The same period shows stability in the high concentration of wealth among the 10% most prosperous, who consistently held 77% of the national wealth in the same period of more than 25 years. True, there were variations in the region – for example, 57% in Ecuador and 80% in Brazil – but what continues to mark the region is its place in the group of countries with high concentration.

Brazil's case dramatically illustrates material inequality. It also reveals how differences in capturing inequality trends depend on the measures and sources adopted. Frequently, such differences translate into divergent interpretations among specialists. Take the Gini index: World Bank data point to a consistent reduction in income inequality in the country from 1999 to 2015, a period in which the index improved from .59 to .52. Much of this change is associated with the redistributive policies of the Workers' Party governments from 2003 to 2015. This positive trend in 15 years does not hold if we take into account a different measure of inequality. Thus, data on wealth from the World Inequality Database (Chancel et al. 2022; Blanchet et al. 2022) show that, as of 2021, in Brazil, the richest 1% hold 49% of the total wealth while the net wealth is negative among the poorest 50%. Furthermore, from 1995 to 2021, the net personal wealth of the top 1% rose from 41% to 49% (Chancel et al. 2022, 185–86). From this same source, a broader measure including capital income shows that, in 2015, the income of the richest 10% was 29 times that of the poorest 50%. The top 1% of the Brazilian population held 28% of the national income, the top 0.01% (14,300 adults) held 7.5%, and the top 0.001% (1,430 adults), 4% (WID 2019, 140).

By acute inequality we mean a severe and pronounced level of inequality between individuals or groups, a situation in which there is a significant and often alarming imbalance in access to resources, opportunities, wealth, power, or social status. By using this term, we emphasize the importance of addressing and rectifying the imbalance in order to achieve fairness, justice, and equity, but also the difference between absolute and relative measures of well-being.

We have not so far mentioned one of the relevant implications of acute inequalities: the declining levels of social cohesion around the world, including in Latin America (Green, Janmaat, and Cheng 2011). Even though the causal direction between social cohesion and inequalities is controversial (Hooghe 2003; Nannestad 2008), available evidence shows a strong association between them (Wilkinson and Pickett 2015; Beauvais and Jenson 2002).

On top of intersecting with the unequal distribution of non-material resources, the wide material gap between rich and poor impairs the establishment of more cohesive and cooperative societies. Acute inequality undermines trust and solidarity as feelings of relative deprivation foster a sense of unfairness and injustice eroding the invisible bonds that hold a society together (Jenson 1998; Green, Janmaat, and Cheng 2011). Moreover, affluent people's capacity or willingness to relate to situations, feelings, and behaviors of the less well-off is compromised as they grow further removed from the uncertainties of everyday life. Being limited in their social imagination by the great social distance that separates them from the poor fosters a worldview that justifies great disparities in access to resources, quality of life, and opportunity (Edmiston 2018).

Cohesion is also affected because the richest part of the population tends to look for private arrangements such as gated communities and private security guards, moving away from the commitment to public life arrangements that promote the coexistence of diverse groups without reciprocal menaces. As a consequence, the quality of public services tends to decline, and the poorest groups are marginalized (Caldeira 2000; Lang and Danielsen 2010). In short, acute inequalities negatively affect the degree of interpersonal trust, civic participation, and the sense of belonging and solidarity that characterizes a collectivity (Sage 2013; Uslaner 2002). These observations justify why reducing income disparities and increasing interpersonal trust and confidence in political institutions must be conceived as part and parcel of a common challenge. Trust fosters social cohesion and therefore reduces transaction costs.

Persistent low and even declining levels of social trust throughout Latin America suggest that the cement of society is fragile in the area. The magnitude of social exclusion prevents cooperation, making groups and classes disregard the basic necessities of their co-citizens.

Despite improvements in reducing inequality in politics and civil liberties that we have seen over the last 50 years, including a rebalancing of the law in favor of non-owners (Piketty 2023), the gap remains wide, maintained by intersecting factors. The extensive literature on the interaction between economic and political inequality offers solid evidence on the weaving of the political economy of inequality (Cole 2018; Page, Bartels, and Seawright 2013). Inequalities undermine democratic legitimacy by reducing citizens' confidence that the richest will not exert unequal influence on the most important political decisions (Diamond 1999). Moreover, the implications of extreme income inequality might be aggravated if the elite that holds most of the wealth has diverging political views and preferences from the majority, particularly with regard to redistribution. The growing political polarization around the world has been linked to social divisions resulting from inequalities (Varieties of Democracy Database 2022).

Yet, possible answers to such a pressing challenge are not easy to implement, as the very divisiveness to be overcome poses dilemmatic choices. How to find ways to broaden cohesion without reducing individual freedom? How to secure diversity and at the same time promote equity? These dramatic questions are coupled with no less perplexing issues: How can we rebalance the quest for greater material prosperity without aggravating the already serious planetary environmental threat humans have created? And how to avoid greater prosperity merely reinforcing the already overwhelming concentration of wealth and political power in the hands of a few people and corporations?

By-products of the blending of high social inequality and exclusion, and low levels of interpersonal and institutional trust directly affect governments' capacity to gather social support for policies to tackle wealth concentration. The collective belief that each group in society will accomplish its part – for example, by paying taxes – derives from a "conditional assent" that the government will do its part by properly implementing the public resources collected and other citizens will also fulfill their obligations (Rothstein 2005). These obligations include refraining from adopting means to circumvent tax authorities. The evidence we found in our empirical studies in Brazil (Reis and Lopez 2023a; Reis and Lopez 2023b), be it researching perceptions of elites or inquiring about degrees of interpersonal and institutional trust of the national population, illustrates to some extent the catch-22 that besieges Latin America.

Summing up, the difficult challenge to surmount is to move from a non-cooperative to a cooperative equilibrium. Even when citizens recognize that cooperation and redistribution would result in gains for all, this is not enough to generate compliance with socially virtuous practices. Actual levels of collective trust and of corruption underlie much of the variation in the functioning of the various welfare systems (Kumlin and Rothstein 2005; Rothstein 2005, 2018). While empirical evidence on that subject has been mostly restricted to advanced welfare systems, it offers an important lesson for Latin America to harness different elites and wider segments of society to support redistribution through public policies. Quoting Rothstein (2005, 9):

> It seems utterly unreasonable to think that it would have been possible to shape public opinion in favor of transferring such large economic resources to various public welfare administrations if the people had strongly believed that those administrations were corrupt and/or engaged in the systematic abuse of power. It seems equally unlikely that it would have been possible to create these comprehensible social insurance systems if citizens were convinced that most other citizens abused or cheated the taxation or distribution systems.

Latin America's challenge of overcoming inequality is the same as that faced by all non-rich countries: broadening cooperation is required to solve collective problems. Yet how can this goal be achieved if it only appears where this "social trap" does not exist? Making individual strategic behavior prone to cooperation, including with public authorities, requires changing the way citizens perceive public agents, bureaucracies, and the State. To secure this change requires the more equitable and efficient provision of policies to the public, which also demands a general perception of the fair functioning and behavior of State agencies and agents – like the civil servants – as well as wider deliberative openness for society to participate in shaping public policies. And there is no way to advance this path without combining improved aggregate levels of material well-being with reduced levels of inequalities between classes and social groups.

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