Mark Mikityuk

PS148A: Latin American Politics

Redistributive Politics and Catholicism in Latin America

Introduction

The topic of religion and its relationship to social-welfare advocacy may appear less important to us in Europe and North America given these regions are growing much less religious. However, this isn't true for Latin America. Relative to Europe and North America, Latin America faces negligible losses, even stable religious affiliation (Bullard, 2021). The fact that religion remains a relevant affiliation in Latin America motivates me to conduct further research on how it may affect how certain policy decisions may be perceived. The Roman-Catholic Church, the primary religious affiliation in several Latin American countries, is a resourceful and powerful social institution. Of all Catholic nations, Latin America appears many times in the rankings of countries with the largest membership. Colombia, Mexico, and Brazil take seventh, second, and first for most total members in the world in 2018 (Jurczak, 2018).

I aim to explore the contributions that these present religious institutions and their affiliated members have, if any, on contemporary pro-poor social policies. Many religious leaders highlight, including the current Pope from Argentina, the necessity of combating poverty. This presents a fair question on whether such discussions influence explicitly pro-poor social policies in these largely Catholic nations. In 2015, Pope Francis's eight-day visit to Bolivia, Ecuador, and Paraguay, he prioritized conversations on combating poverty by criticizing the rich's "golden calf," or idol, which, he argued, had demanded the sacrifice of the poor at the "altar of money." (Rev. Jackson Sr. and Kim, 2015) Though Pope Francis is referred to by many

Roman Catholics as a "reformer" Pope, there is nonetheless a deep tradition in Catholicism to highlight the moral evils of greed, corruption, and poverty; there is a sympathy towards pro-poor social programs inherent to Catholic doctrine regardless of whether a Catholic's preference is for more "Conservative" or "Reformist" doctrine. Because of this, I'm motivated to research this hypothesis: whether the members of Roman Catholicism, who will hereafter be called "Catholics," in Chile, Colombia, Mexico, and Brazil, constitute a significant "social actor" for redistributive advocacy.

Literature Review

The literature assessed in this section was provided under the Week 13 Course Module: Social Policy. This research proposal will function similarly to Fairfield and Garay's (2017): articulating an unexplored, potential explanation within redistribution theory. They established the data that qualified the preceding redistribution theories that once emphasized median-voter preferences, economic resources, and partisanship alone. Their expansion allowed for more explanatory traction for Latin American cases like those discussed in their studies: Mexico and Chile. This proposal will question whether the established literature on social actors omits a significant actor, the Catholic Church, which is institutionalized, harbors redistributive sympathies, and possesses large-scale mobilizational capacity.

The prior literature on redistributive theory was that redistribution would only take place if the income distribution was skewed enough to produce a perception to the median voter that compelled them to vote for the left-party: the perception that they are "more proximate to the poor than the affluent." (p. 1874) However, Fairfield and Garay (2017) identified two central problems with this theory: "neither the level nor the structure of inequality is a good predictor of

voter preferences" and "median-voter preferences need not determine policy outcomes… since organized social actors, e.g. business associations, labor unions, and social movements, may be much more pressing for policymakers." (p. 1874-75) Since the timing of redistributive policy does not correlate with high economic growth or inequality and partisanship cannot satisfactorily explain how redistributive policies are adopted during both right and left-dominance in government, the focus changes to electoral competition and the social actors that influence policy debates on redistribution.

In terms of electoral politics, parties, irrespective of ideology, produce redistributive policies to garner the support of nonaligned low-income voters if the input of social actors, e.g. business and social movements, are fixed. Cardenas, in Hellman's (1994) qualitative study of Mexico, aimed to unite these nonaligned low-income voters with his campaign for power to challenge the landholding class of 1937 (p. 61). However, these social actors are not always fixed or hold congruent interests. The right-wing cases of Mexico (2000-2012) and Chile (2010-2014) display how business interests and social movements often compete for political courtship (Fairfield et al, 2017).

Additionally, this is supported by Hunter's (2014) analysis of Brazil's lack of bottom-up demands for social programs. Even as Brazil has moved from a less clientelistic to a more universalist model of social assistance, it was mainly middle-class protestors, not low-income Brazilians, that were seeking to expand the redistributive policies in 2013. This suggests that these middle-class protestors were a more politically-salient social actor than the poor (p. 4). In Argentina, Brazil, and Chile, social mobilization "significantly influenced the policy design" of the incumbents and led them to "expand benefits for labor-market outsiders," but was

nonetheless contingent on whether a well-organized business interest was competing (Fairfield et al, p. 1881).

A related theme developed in the literature by Hunter (2014) concerns the transition from a clientelistic social program to a universalistic one, including the perceptual differences between them: the former a charity, or an otherwise contingent good, whereas the latter is understood as an entitlement, a securely held right. This can be associated with the manner that a social actor can frame the redistributive politics. I will focus more on exploring whether the Catholic Church functions as a social actor that influences electoral politics in favor of redistributive politics. I will briefly integrate Hunter's conception of social programs as universalistic given that the nature of Catholic doctrine would support such rhetorical and conceptual framing, but this isn't foundational to the research question.

Theoretical Framework

The theoretical framework is nested within redistributive theory and explores whether the Catholic Church constitutes a social actor whose inclination favors redistributive politics. The independent variable would be the religious affiliation of a median voter/citizen in the policymaking process. There are two causal mechanisms that I wish to explore within this hypothesis: the *simple* causal relationship and the *doctrinal* causal relationship.

The "simple" causal relationship is based on viewing religious affiliation as homogenous. If the religious affiliation of a voter is Catholic, then they would be inclined to support universalistic pro-poor social welfare programs. All things equal; the more Catholic voters, the greater the wealth redistribution. This would be true under right-dominant governments as the data from Harbers et al (2012) suggests that Catholics in Latin America significantly correlate

with right-wing party alignment. And this would be true under left-dominant governments since partisan distributive theorists have already revealed the correlation between them and redistribution (Fairfield et al, p. 1881) and Catholics presumably wouldn't oppose policies they sympathize with. This also suggests that the research on Catholic influence is more relevant in researching how right-wing governments adopt social programs.

Moreover, the percentages of the Catholic population would have to be adjusted for the percentage who registered to vote, or are otherwise politically active, versus those who are non-Catholic. Assuming each group's activity is proportional to their population size, the pattern would be in the order of higher proportion of Catholic membership (and therefore more sympathetic to redistributive policies) to a lower proportion: Mexico, Colombia, Brazil, Chile (Sawe, 2018) (Cheney, 2005). Factors that may influence this relationship can be the existence of systemic obstacles to a group's ability to participate politically and would therefore change the proportion to which Catholics or non-Catholics influence electoral politics as a social actor. Furthermore, in this simple causal mechanism, I assume that the institution of Catholicism in Latin America utilizes its large-scale mobilizational capacity to protest, lobby, and otherwise make irrelevant other social actors like business interests who do not hold comparable supermajorities similar to its ~80% membership. This particular theoretical framework would best fit a regression analysis, or a large N comparison.

However, this would not necessarily suggest that redistributive policies could not occur in non-Catholic nations, but would instead suggest that variability of universalistic versus clientelistic would occur in a spectrum that goes from more Catholic to less Catholic given a Reformist interpretation of the doctrine. Likewise, in comparative cases with other

religious/ideological but non-Catholic countries, analyzing the doctrinal support of redistributive politics would be equally predictive as the Catholic support of redistributive politics.

The second causal relationship that can be explored is the "doctrinal" relationship. This would suggest that Catholics, as a group, must be viewed as non-homogenous social actors and that statistical partisan alignment cannot be taken as prima facie endorsement of all positions their respective nation's right-wing parties hold or even of all the positions the official Catholic Church holds. This would frame Catholics as existing on a religious and political continuum. The religious continuum might fall into a bimodal distribution with two peaks correlating to what "Conservative" and "Reformist" Catholics tend to view as the doctrine (and the margins constitute the doctrinally indifferent members). From here, the political continuum would be bimodally distributed, but perhaps with more peaks that correlate to the resulting views. Conservative Catholics would be spread out between those who don't vote or participate for religious or partisan reasons, don't support any pro-poor social programs, or don't support explicitly universalistic framings of social programs. Reformists would be spread out between those who support universalistic framings of social programs and those who might align with other social actors that support pro-poor social programs like LGBTQ+ or Communist/Leftist movements. The margins between both would be those who are indifferent to the religious doctrine and this provides little explanatory value so cases where most are indifferent would need to be explained by other variables.

The "doctrinal causal" relationship would be used to explain how national peculiarities influence how Catholicism is expressed politically as a social actor in electoral politics. Two causal relationships would be: the more Conservative members, the less power the Church has as

a social actor to promote universalistic pro-poor social programs. The second relationship is its inverse: the more Reformist the members are, the more power the Church has as a social actor to promote universalistic pro-poor social programs.

This causal mechanism would explain within-country, over-time variation in interpretations while also revealing cross-national causal processes like how the Church acts as a social actor to influence both partisan and electoral politics and how it competes with business interests, when they're organized and when they're not. This may explain how the philosophical and cultural foundations that redistributive social movements rely on arise: right-dominant politics, unorganized business interests, and a majority of Catholic Believers who are conservative (but wish for clientelistic welfare programs) all coalesce as factors to produce a "moderate" social welfare program like that of Mexico or Chile.

Research Design

When I was formulating the design of the research proposal, I favored the complex analysis that the *doctrinal* causal mechanism offers. It seemed best fit to continue the model used by Fairfield and Garay, a small N comparison, since the nature of religious affiliation, while explicitly universal in the doctrinal sense, remains constrained in its political influence by the particularities of the interpretation its members have.

If this was instead formulated by the regression analysis, or large N comparison, of Catholic affiliation and votes for/mobilization of social movements in all countries, this would allow us to make more cross-national, theoretical claims on the function of Catholicism as a social actor, but it would erase the national distinctions in Catholic doctrinal interpretations and reduce the explanatory power of national religious affiliation by producing predictions that either

overestimate social policy support from more aggregate conservative Catholics or underestimate social policy support from more aggregate reformist Catholics in a particular nation at that particular time in question.

Therefore, the purpose of this research design proposal would be to ultimately produce in-depth case studies which reflect my conviction that paying close attention to Catholicism as a social actor is imperative for advancing theory on redistributive politics in Catholic, Latin American countries. This will be done by process tracing to validate my arguments, illuminating the causal mechanisms at play, and analyzing competing hypotheses. It will be necessary to draw on evidence from primary and secondary sources in systematic doctrinal records, government-conducted statistical data, and contemporary fieldwork.

There are various diagnostic pieces of evidence that we can process-trace to reveal causal claims and where we get the evidence is crucial. The diagnostic evidence for the independent variable will be from the following primary-source documents: historiographical data of when, how, and for how long a particular doctrine of Catholicism is introduced in each country case and whether a particular doctrine holds a majority or more of the members in addition to their proportion of the general population. This can be found in that country's liturgical writings (Catholics are known for extensive data collection), providing doctrinal data, membership numbers via births and deaths, Church schisms, etc., for us to systematically assess. Canonical mandate 535,§2 requires that each parish "possess, accurately inscribe, and carefully preserve" a set of parish books "including baptismal, marriage, death registers" and other relevant doctrinal information that may potentially include protests, political mobilization, or other relevant data. This evidence exists for Brazil, Chile, Colombia, and Mexico ("Sacramental Registers…").

This primary source evidence would need to be complemented by similar primary source data in the form of historical government-conducted statistics: census of the total population, voter registration, party membership, party gains/losses in elected offices, and public law passage archives (including those that failed to be ratified). This would provide the appropriate analysis of primary data for each country case-study as it relates to the intersection of doctrinal interpretation, proportion of believers relative to the population, political mobilization through liturgical data on protests, partisanship by determining the size of parties/governments in office, and redistributive legislation via passed/failed law archives. It may also prove useful to investigate any autobiographical novels and newspapers that would report notable protests, strikes, or other social organization tactics in the event the liturgical data underreports this. Potentially, if some parts of the primary source data are inaccessible, utilization of secondary source data is appropriate for factor analysis.

Once the evidence has been authenticated and analyzed, process tracing takes its form for the causal claim mechanism by tracing the contiguous flow of evidence over-time. In the case of Chile from 2010-14, it could be tracing how Catholic church membership growth for Reformist Catholic interpretations was significant. These interpretations are extremely sympathetic to poverty alleviation thereby explaining why advocacy for redistributive politics took place. Furthermore, since leftist parties were marginalized under the right-dominant government, the Catholics allowed business interests to be more charitably considered in the discussion of how redistributive politics would be adopted given a general Catholic indifference to tax rates; therefore these produced what are considered "moderate" social programs (Fairfield et al, 2017).

The reason the aforementioned cases fit the research design is because they all vary in total percentage of the population identifying as Catholic, with a high of 87% and a low of 58%, (Cheney, 2005) and they also vary in both the partisan governance and doctrinal interpretations, which allows for a multi-dimensional analysis of their role as a social actor that influences redistributive politics. Each country serving as a case study also allows us to understand how certain social movements may overlap with the Catholic Church. I intentionally chose Brazil, Chile, Colombia, Mexico because these are country case studies offered in the literature provided for Week 13: Social Programs and gives me extensive secondary source material to supplement this research question.

Some rival hypotheses that may prove to make this information obsolete are other potential confounding variables within the social movements categories. Perhaps the variability in the *doctrinal* causal mechanism I described in my theoretical analysis is merely a combination of other social identities and their related advocacies, i.e. Reformist Catholics in a largely Catholic nation could be the composite of leftist, gender-inclusive, and young/student activists and these other identities would more accurately represent the role of a social actor in terms of advocating for redistributive politics. Perhaps the future of Latin America is extremely secular, but this will have descriptive utility for historical cases which I'd make clear under the *doctrinal* causal mechanism over-time.

Overall, I am fascinated to learn about religious institutions and political mobilization. I'm eager to see if analysis of the evidence suggested in this research design would prove to be consistent with my hypothesis that Catholicism has an implicit advocacy for redistribution.

Bibliography

Bullard, Gabe. "The World's Newest Major Religion: No Religion." *Culture*, National

   Geographic, 3 May 2021,

   www.nationalgeographic.com/culture/article/160422-atheism-agnostic-secular-nones-risin

   g-religion.

Cheney, David M. "Statistics by Country." *Catholic Hierarchy*, 20 November 2005,

   www.catholic-hierarchy.org/country/sc3.html.

Fairfield, Tasha, and Candelaria Garay. "Redistribution Under the Right in Latin America:

   Electoral Competition and Organized Actors in Policymaking." *COMPARATIVE*

   POLITICAL STUDIES, vol. 50, no. 14, Dec. 2017, pp. 1871–1906. *EBSCOhost*,

   doi:10.1177/0010414017695331.

Harbers, I., de Vries, C. E., & Steenbergen, M. R. (2013). Attitude Variability Among Latin

   American Publics: How Party System Structuration Affects Left/Right Ideology.

   Comparative Political Studies, 46(8), 947–967. https://doi.org/10.1177/0010414012454409

Hellman, Judith Adler. Mexican Lives. New Press, 1994. Pp. 50-62, 127-139. EBSCOhost,

   search-ebscohost-com.libproxy.berkeley.edu/login.aspx?direct=true&db=cat04202a&AN=

   ucb.b11265125&site=eds-live.

Hunter, Wendy (2014), Making Citizens: Brazilian Social Policy from Getúlio to Lula, in:

   Journal of Politics in Latin America, 6, 3, 15–37

Jurczak, Kasia. "Countries With The Largest Roman Catholic Populations." *WorldAtlas*,

   WorldAtlas, 27 July 2018,

   www.worldatlas.com/articles/countries-with-the-largest-catholic-christian-populations.htm

l.

Rev. Jackson, Jesse Sr. and Grace Ji-Sun Kim. "Religion: Pope Francis Reminds the World To

Care About Poverty." *Time*, Time, 20 July 2015, time.com/3963125/pope-francis-poverty/.

"Sacramental Registers and Record Keeping." *Home - Catholic Bishop of Northern Alaska*,

dioceseoffairbanks.org/joomla/index.php/who-we-are/policies/440-sacramental-registers-a

nd-record-keeping.

Sawe, Benjamin Elisha. "Largest Religions In Chile." *WorldAtlas*, WorldAtlas, 9 July 2018,

www.worldatlas.com/articles/largest-religions-in-chile.html.