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978-1-107-06331-0 - Contention and the Dynamics of Inequality in Mexico, 1910–2010

Viviane Brachet-márquez

Excerpt

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Introduction

Inequality is a radical condition of social life, omnipresent in all but the most simple archaic societies, and pervading virtually all social relations, from the most formal and public to the most private and intimate. Yet in everyday life, its manifestations are so habitual as to be virtually unregistered by most, while its place in the social sciences is relatively modest, except as an applied field. Yet inequality is no asteroid that mysteriously landed on earth from outer space, and since then has been so embedded in our planet that we can barely see it or recognize how it qualifies every one of our experiences.

This book is about ordinary people living in three ordinary Mexican villages at different times and in different circumstances, and how they have dealt with unequal life chances, real as well as perceived. It seeks to understand why they have accepted their lot for most of the time, no matter how inequitably apportioned, yet have on occasions collectively engaged in disputes over this or that limited good or service to which they felt entitled, or opposed something they perceived as injurious to their rights, or to their way of life.

Since Karl Marx identified false class consciousness as the culprit for the ready acceptance by the laboring classes of things as they are, and discredited as historically insignificant their occasional struggles for a greater voice or better living conditions, few alternative sociological answers have been offered to the age-old question of whether ordinary people can do anything about improving their lot in society.¹ So perhaps to ask *what it is in the organization of societies and the actions of their people that creates, nurtures, or debilitates inequality* is,

¹ Important exceptions to this generalization are Barrington Moore's work on the consequences of social injustice for subaltern groups (1978), James Scott's work on peasant resistance to exploitation (Scott 1985; Scott and Tria Kerkeviet 1986), and the key contributions by Mallon (1994, 1995), Roseberry (1994), Knight (1994), and others to the debate about everyday State making (Gilbert and Nugent 1994).

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now as before, a timely question to ask in a world in which inequality keeps growing, despite massive South–North immigration and modest advances in the life chances of the vast underprivileged majorities trying to survive in the poorer periphery.

This question is asked here not just about the exceptional rebellion or the rarely redistributive revolution, which have concentrated most of the scholarly interest in the capacity of human societies to shape and transform themselves. Our inquiry is also about more ordinary everyday battles, which can minutely or substantially improve or worsen the life chances of those on the lower end of inequality, who engage in them in defense of what they feel they are entitled to, or in the hope of obtaining a better place in society, mostly marginally and locally, but at times beyond their immediate circumstances.

To investigate this problem, we must first cease to consider inequality as a structural given to be studied independent of the actions of those suffering, resisting, or imposing it. In that sense, most of the information so far gathered about inequality – its distribution within and between countries, its intergenerational transmission, the policy instruments limiting or exacerbating it, its social and economic consequences, and so forth – can only tell us what different varieties of inequality look like in diverse contexts (which we mostly know, if less than systematically), instead of *how it is ordinarily as well as exceptionally produced and transformed*.²

What forces drive inequality in societies? What social processes activate these dynamics? And, how are counterforces created resisting these trends? In answer to these questions, particularly the second and third, the present study places contention at the center of the dynamics of inequality. The basic argument is that *contentious politics, the ubiquitous and daily process of social conflict confronting actors with rival distributive claims over positions of power and/or resources, is the historical process of structuration³ of inequality which shapes, reproduces, modifies, or destroys (from above or from below) the rules of unequal distribution of power and resources – or the pact of domination – institutionalized at any given time over a national territory*.

This theory modifies, extends, and integrates previous theorizing: first, the theory of contentious politics proposed in various works by Charles Tilly and his coauthors (McAdam, Tarrow, and Tilly 2001; Tilly 2008; Tilly and Tarrow 2007), but more systematically in *The Dynamics of Contention* (McAdam *et al.*

² Nevertheless, Galbraith's (2012) recent contribution to greater precision, reliability, and breadth in the measurement of inequality within and between national units as well as worldwide is extremely useful, especially as it serves him as the starting point for asking whether economic inequality is related to economic structure, particularly phases of economic development. See also López-Calva and Lustig (2010) and Fenstermaker (2002).

³ As a first definition of structuration, a concept which is explained fully in Chapter 1, we propose that people's practices constitute and reproduce over time the established patterns in which societies function, whereby they are both structuring subjects and structured objects.

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2001), as a generalizable form of social conflict; second, the pact of domination scheme by Brachet-Márquez (1994, 2010a), which stands for the institutionalized ways in which inequality shapes social relations as overseen by the State,⁴ and modifiable through pressures and claims issued from above as well as from below; and third, the theory of structuration (Bourdieu 1977; Giddens 1984; Sewell 1992), here formulated to specify the role of agency in processes of contentious politics, and in the generation and stabilization of pacts of domination. In this broader theoretical framework, inequality is both an organizing principle of social life and a recurring source of inter-group conflict through which the pact of domination is reproduced, partially transformed, or occasionally replaced through the general process of contention, understood as the basic dynamic principle underlying changes in the levels and intensity of inequality.

SELECTING CASES⁵

In order to explore the degree to which contention reproduces or modifies inequality, we should ideally select research contexts in which inequality between contentents varies, and the rate of contention is generally high, although also variable. In these respects, Mexico and, within Mexico, the state of Morelos, provides a favorable setting for the kind of study envisaged. On the one hand, Mexico is, and has always been, relatively high on the scale of inequality either internally or with respect to other countries (Cortés and de Oliveira 2010), and on the other, the state of Morelos, also fairly high on inequality, has long been considered one of the most contention prone in the country (Mallon 1994, 1995).⁶

Three periods between 1910 and 2010 were selected, representing three different historical backdrops, differences in standards of living between peasant villages and neighboring landowners or cities, and in degrees of challenge by village contentents of changes in the established order of inequality: the revolutionary period from 1910 to 1920; the mid-century period from 1953 to 1972; and the period from 1980 to 2010 spanning the end of one century and the beginning of the next. The first period, which represents the

⁴ In this work, State with a capital “S” will refer to the State in general, whereas state uncapsalized will refer to Mexico’s territorial units (as in the state of Morelos).

⁵ A more detailed exposition of the methodological decisions and their criteria are given in Appendix 2.

⁶ Mexico’s Gini index was .48 in 2010, according to the CIA World Factbook (www.nationmaster.com), just above the United States (with .45), and midway between the most and the least unequal countries in Latin America (Bolivia with a Gini index of .59, and Nicaragua with .43, respectively). Mexico’s National Council for the Evaluation of Social Development Policies has estimated Mexico’s Gini coefficient to be .456 in 2008, based on surveys of Household Income and Expenses, and that of the state of Morelos for the same year at .478 (Coneval 2008), midway between the most and least unequal states, Chiapas (.557) and Tlaxcala (.425) respectively.

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highest level of inequality, starts from a contentious episode immediately preceding the uprising against Porfirio Díaz's government in 1910. The focus during this period is on the contention in the village of Anenecuilco that marked the starting point of the struggles for land and autonomy led by Emiliano Zapata, and subsequently prompted the collaboration of the Zapatist movement with other contentious movements bent on removing Porfirio Díaz from power. The second period corresponds to Mexico's industrial takeoff, which marginalized the rural population in relation to the growing industrial labor force, and therefore was marked by increasing inequality between life in communal villages and rising living standards in urbanized Mexico. Yet, levels of inequality were not as acute as in the preceding period. During this second period, the study focuses on three cases of contention over land taking place in Ahuatlán,⁷ a village in the vicinity of Cuernavaca, the capital of the state of Morelos. This period is characterized by the emergence of various national contentious movements (teachers, railway workers, the National Liberation Movement, and the student movement) set within the context of the Cold War. These cases represent medium to high levels of contentious politics. Finally, the third period, from 1980 to 2010, is generally marked by increasing inequality between town and country, except in the case of Ocotlán, the third village selected, due to the latter's proximity to the state capital. The four cases studied in this third village are framed by the 1992 reform of the constitutional and legal provisions for the Agrarian Reform, by the signing in 1994 of the North American Free Trade Agreement (NAFTA) between Canada, the United States, and Mexico, and, generally, by the decline of the Institutional Revolutionary Party (PRI), the ruling party from 1946 to 2000, and by increasing political pluralism associated with a higher degree of tolerance of contention by Mexico's governments on all levels. Despite such important structural changes, the cases studied are set in lower levels of inequality than in the previous two periods and, of the three periods, also represent the lowest intensity of contention.

In principle, there could have been alternatives to the choice of Morelos – such as Chiapas, which has the highest Gini coefficient (.557) of all the states in Mexico. But Chiapas' history of contention is relatively recent (the second Zapatist movement, led by subcomandante Marcos, started in 1994), so it has played no part in the Mexican Revolution, revolution being the highest intensity of contention ideally to be included in the study.⁸ The same goes for

⁷ The names of Ocotlán and Ahuatlán are fictitious. Anenecuilco, however, is the authentic name of Emiliano Zapata's birthplace. Throughout the book, the names of people will also be fictitious, except for the revolutionary period.

⁸ Needless to say, penetrating the second Zapatist uprising with the kind of detailed processual information needed would have been a huge and extremely problematic enterprise by itself, yet would not have substantially improved (and might have worsened) the chances of obtaining what I set out to achieve.

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the northern parts of the country, where Francisco Villa's actions represented an important component of the Mexican Revolution. Yet Villa did not head a regional grassroots movement, as Emiliano Zapata did, and only the state of Morelos was the site of a contention from below that expanded to other states, and grew to be a vital component of Mexico's national revolution.

Contentious issues in the second and third periods were selected by examining claims registered in the National Agrarian Register (RAN) since the 1940s, which, in turn, determined the choice of Ahuatlán and Ocotlán as research sites. We did not find issues other than about land in the second period, although we found variety in the resolution of the three land issues registered, among them a case of land invasion representing a high level of challenge of the status quo in inequality. But we found ample variety among the issues in the third period, ranging from that related to land (registered vs. unregistered *ejido* members) to outsiders' attempts to create modern businesses in the village, and a contention within the local school that engaged the active participation of the villagers.

The primary reason for selecting these three villages was their privileged situation with respect to the process of contention, not the fact that they may have represented a window onto the contextual social trends that constrained or enabled the actions of the contentents under study. Nevertheless, some of these trends were, indeed, mirrored in the cases. For example, given that Ahuatlán and Ocotlán had never produced more than subsistence agriculture in the past, and were close to the state capital, they did not share the decline of Mexico's most rural villages since World War II. With rising standards of living in urban Mexico, their land soon represented a gold mine for large capital to carry out land and commercial developments. Also due to their location, they became dependent very early on employment in the modern economy, but – contrary to countless villages located too far from cities – such dependence did not force their inhabitants to migrate. Additionally, we discovered, when exploring the archives of the Agrarian Reform (cited in each case) that compared to other villages in Morelos, Ahuatlán and Ocotlán had pugnaciously resisted such inroads into their autonomy, thereby deserving their reputation for being contentious.⁹ As for Anenecuilco, we did not choose it among possible others: it is simply the village where the 'Revolution of the South' started, quickly expanding to the whole state of Morelos and to neighboring states, and later to the whole country. In sum, given that the focus of the study was not on tracing general historical trends in our selected research subjects, we adopted Tilly and coauthors' methodological decision to treat

⁹ In particular, we conducted initial interviews to determine the presence of contentious issues not registered in the agrarian archives during the third period in two more villages in the vicinity of Cuernavaca (Chamilpa and Santa María Ahuacatlán), but surprisingly found virtually none in either case.

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such exogenous processes as contextually rather than causally related to the processes of contention being studied.

Our intent also excluded carrying out a general survey of contentious politics in the state of Morelos, so that we made no attempt to obtain a general estimate of the propensity for contention across all towns and villages of that state, based on a probabilistic sample of this population.¹⁰ Before any research on the incidence of contention over any given territory could be undertaken, we first needed to be certain that this process, as conceptualized by Tilly and coauthors and modified in the present study, was robust enough to be unambiguously recognized in every case, so we could be reasonably certain that we were not placing apples and pears in the same basket. Consequently, the approach adopted has been to select a series of interrelated case studies – interrelated by substantive issues of contention and inequality, by geopolitical location in a state historically ranking high on both contentious politics and inequality, and by a temporal thread that joins expressions of those issues in different historical contexts. To maximize the chances of examining critically the contours and characteristics of the process of contention and assess its impact on inequality, it was therefore decided to gather a purposive sample in which all relevant dimensions – substantive issues, gradation in the level of confrontation of established rules, contextual situations, and peacetime versus revolutionary contention – would be present, together with controls for location, kinds of contendents, and region/country. The purpose behind the selection was therefore not to represent a population, but to zero in on relatively rare cases that included all the theoretical conditions that we needed in order to explore critically the fruitfulness of the model of contentious politics as related to the dynamics of inequality. As a result of these choices, the three villages selected are statistically highly unrepresentative, all three being agrarian communities, (presently a minority in rural Mexico),¹¹ all three having participated to a varying extent in the 1910 Revolution, and one of them – Anenecuilco – being the birthplace of the so-called Revolution of the South.

Summing up, we wanted the case studies to help us answer the following questions:

Does Tilly and coauthors' definition of contention correctly identify this phenomenon, or do our observations suggest (a) that too much variation is found between one kind of contention and the next to merit being classified under a single rubric, in which case, (b) how should the concept be modified?

This problem of identification, logically prior to that of distribution, consists in: (1) carefully identifying the contours and limits of the process of contention

¹⁰ This could have been done, for example, by recording the incidence of contentious events as reported in newspapers over the 100-year period of the study, as Tilly (1995a) did for eighteenth-century Britain, but that would have been a different project, of more breadth and less depth.

¹¹ By 2007, there were 31,518 *ejidos*/agrarian communities in Mexico, including 4.5 million individuals owning communal lots in them (Appendini 2010: 69).

Approaches, disciplines, and area studies

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case after case; (2) revising and polishing, if necessary, the conceptual terms in which to express it; and (3) making alternative theoretical propositions to those offered by Tilly and coauthors. Items (1) and (2) are oriented toward verifying whether it is fruitful, in the context of the present study, to think in such terms as those offered by Tilly and coauthors in order to investigate processes of permanence and change in inequality, and if not, what substitute terms can be offered. Item (3) proposes a novel use of the theoretical model of contention.

The following research questions guided the study:

- (1) Are mechanisms, the dynamic principles said to be inherent to contention, present in the case studies in the way specified by Tilly and coauthors, or should this concept be modified in the face of case evidence?
- (2) Is it reasonable to argue, as Tilly and coauthors do, that contention can be assumed to span all kinds of conflicts (previously studied separately) that can be compared despite being found at different times, different levels of analysis, and in different sociopolitical contexts?
- (3) What difference (if any) do different kinds of contention make to the distribution of inequality *in situ*, and to the rules of inequality in society? This is a question that Tilly and coauthors did not ask.

To answer these questions, it was necessary to make sure that the case studies selected were definitionally and processually incontrovertible instances of contention. In short, the goal was to establish the internal validity of the cases under study in the sense that they could all be considered instances of the unfolding of the same general process of contention, that is, of the structuring of inequality in the three different historical settings selected. Through these choices of periods, villages, and issues, the claim that contention theory can model every political conflict, from the least to the most conflictive (McAdam *et al.* 2001) could be tested based on these eight case studies, which purport to portray various manifestations and intensity levels of contentious politics, from a national revolution to simple local disputes. Lastly, the choice of informants was also guided by the research questions asked in the sense of seeking contacts with individuals either mentioned as active participants in the agrarian archives, our primary source, or designated by those already interviewed following this principle.¹²

APPROACHES, DISCIPLINES, AND AREA STUDIES

Although divisions between disciplines and subspecialties in the social sciences are somewhat artificial, they are replete with territorial claims and power struggles that often project different readings of social reality. It is therefore important to indicate the kind of nondisciplinary approach adopted in this

¹² For more detail regarding sources of information and methods of interviewing, see Appendix 2.

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book. First, given that it represents an effort to integrate the micro- and macrodynamics of inequality, the book cannot be circumscribed to ethnographic research of peasant communities or everyday State making (Gilbert and Nugent 1994), although it contains elements of both. Nor can it be considered a contribution to what has been called historical sociology in the classical sense in which this term has been understood. Although the period during which the events that are analyzed runs from 1910 to 2010, the study does not aim at using the cases as reference points to characterize the changes taking place from the beginning to the end of this time stretch taken as a whole.

But if historical sociology is understood as the analysis of social reality as produced and reproduced through time, which requires narrative tools and historical data, then this book can be classified as historical sociology. The narratives constructed include conflictive occurrences concatenated along a time dimension to conform to the process of contention structured by endogenous ‘mechanisms’ that constitute the dynamic principles moving this process forward. The express purpose of extracting these internal mechanisms is to show how actors combine them in their strategies. In this way, social reality is viewed as a dynamic and changeable whole, in contrast with the kind of ‘normal sociology’¹³ that too often registers change by comparing snapshots taken at different times, or simply disregards change altogether, delegating its study to specialists of that phenomenon.

It was not until structuration theory established, now 25 years ago, that change is not something distinct from permanence, but that both can and must be explained using the same theoretical instruments, that sociology acquired the necessary theoretical tools to deal with change. Nevertheless, this theoretical revolution did not have the expected impact on sociological practice. Most sociological production continues to look like a medical science consisting of extremely sophisticated anatomical studies on the basis of which causal inferences are made on how human organisms function, yet with no attempts to test the processes imagined to account for these associations.

Finally, this book should not be exclusively considered as part of what is usually referred to as Latin American studies simply because the events analyzed happened to take place in Mexico. More than contributing to a geographic area study, the present work aims at answering the general question of *why, and through what processes and mechanisms, people accept inequality or struggle against it, and to what extent these processes and mechanisms are constitutive and transformative of the social orders or pact of domination whose fundamental organizing principle is inequality*, dealt in various proportions and with varying intensity in different parts of the globe and at different

¹³ I speak of normal sociology in the sense given by Kuhn (1962), of a general paradigm followed by the majority of the scientific community.

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times. That is an eminently political question, so perhaps, just as Molière's *Bourgeois Gentilhomme* wrote prose unknowingly, I may have unknowingly been doing political sociology all along.

Summing up, no attempt has been made to provide, through the case studies selected, a general portrait of twentieth-century Mexico, or a general panorama of that country's agrarian communities as they have evolved since the 1910 Revolution.¹⁴ The aim of these case studies is *to capture contentious interactions between specific groups in peasant communities and interests external to these communities during specific periods, that tend either to reproduce or challenge the patterns of domination that determine the respective positions occupied by contenders in the unequal distribution of power and resources, as set against a changing background of local/regional development and political reality*. Each period in which the cases are set – 1910–1920 in Anenecuilco and southern Mexico in general, 1953–1970 in Ahuatlán, and 1980–2010 in Ocotlán – represents a different contextual setting in which to observe these interactions, which is held constant for the cases belonging to that period. As a result, similar repertoires of contention (land invasions, street blockades, and so forth) will be seen to have different meanings and consequences, depending on the period to which they belong, going from State inaction or mild reprimand to outright repression. So, the cases have been selected for their potential for change (given background constraints) in the degree of inequality between the actors of these villages and those against whom they contend, ranging from local change of little consequence outside of the locality to the overall revolutionary change which made modern Mexico. In each case, we see ordinary people struggling against inequality – felt and real – as, for example, against an hacienda invading peasant land, against capitalist intruders speculating on communal land, or against those attempting to bribe some individual members of the village so as to build a large shopping mall on village communal land. On the other side of the contention, we see “investors” trying to take advantage of the low price of communal land, local corruption, and, generally, the institutional backing that they normally enjoy in their endeavors. To do this, we use case analysis showing, in each instance, a variant of the unfolding of the process of contentious politics involving (a) the micro-processes of contentious interaction between local/regional actor–agents, and (b) the macro-consequences of these micro-processes for changes in the rules of inequality in Mexico.

THEORETICAL OUTLINE

As defined by McAdam *et al.* (2001: 5), contention is “episodic, public, collective interaction among makers of claims and their objects when (a) at least one

¹⁴ However, Chapter 2 offers an overview of the history of the Agrarian Reform and evolving practices in agrarian communities.

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government is a claimant, an object of a claim, or a party to the claims, and (b) the claims would, if realized, affect the interests of at least one of the claimants.” This is the process whose components and dynamics will be critically examined in this study case after case. However, distinct from McAdam *et al.* (2001), the State will not be regarded as any other claimant with its own interests, but as the key institution charged with maintaining political and social order, based on adherence to established rules within a defined territory (municipality, state, or federation), as it has developed and been institutionalized historically. The present study refers specifically to the State (with its different levels of jurisdiction and distinct territorial subunits) created by Mexico’s 1910 Revolution, the evolution of which will be briefly touched upon in each empirical chapter.

At the lowest analytic level, the villages under study are regarded as natural laboratories in which the contention process is acted out as part of everyday relations within these villages, with other social groups, and with the State. Here, the attempt is to discover if observed episodes of contention have as basic components underlying mechanisms,¹⁵ some of which are theoretically equivalent, as Tilly and coauthors argue. At a second analytic level, the task is to determine the inflection points at which subaltern subjects of contentious episodes are able to suspend or modify the execution of institutional and legal rules that are not always clear, and thus are subject to challenge and change.

At both analytic levels, persons and collectives that intervene in processes of contentious politics are considered to act as agents,¹⁶ that is, as persons and groups that collectively think and act consciously and purposefully in defense of what they consider to be their rights, and in the pursuit of their perceived interests. The idea of agency, as used here, is inseparable from the concatenation of events that structurally transform a situation previous to these events (Sewell 1992), and could not have occurred were it not for the intervention of individuals or constituted groups (Giddens 1984: 9). Methodologically, this implies that structuration or agency can only be observed or historically reconstituted through the longitudinal registration of the events generated by these agents. This is the reconstruction undertaken here, where each case represents a process spanning several years, during which particular participants on both sides of the contention appear and disappear, some as mere reproducers, and others as potential transformers of their personal situations or the general rules of inequality as applied to the contenders or to the country as a whole.

The notion of agency, only implicit in Tilly and coauthors’ definition of contention, makes it possible to combine the theory they propose with the pact

¹⁵ Mechanism is defined here as a dynamic principle that forms part of a complex process based on actions by agents who activate a series of events, and that explains the changes registered overall. A detailed discussion of this concept and the way it is used in this study awaits Chapter 1.

¹⁶ As put forward in Chapter 1, this term refers to a person or group with a reflexive capacity and an ability to stimulate changes in structures by reinterpreting and mobilizing resources creatively.