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A post-liberal theory of stratification[1]

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Abstract

The iconic 'liberal theory' of stratification fails to attend to the many types of downward mobility and wage loss generated by late-industrial stratification systems. Although the liberal theory and its close cousins assume that loss and failure will be interpreted in individualistic terms, recent developments suggest instead that they are generating solidary groups that are increasingly locked into zero-sum contest and successfully mobilized by politicians and other norm entrepreneurs. These developments imply a Marxisant future for late-industrial inequality that bears scant resemblance to the highly individualized, unstructured, and non-conflictual stratification system envisaged by the liberal theory. We outline a new post-liberal theory of stratification that better captures the forces making for change and resistance in late-industrial societies.

Keywords: Mobility; inequality; liberal theory; loss; resistance; populism; rent

The liberal theory of stratification, which projects a benign future of widely shared opportunity and prosperity, remains the foil around which a great many contemporary analyses are still oriented (see Grusky and Hill 2017). Although the liberal theory dates back at least a half century (Blau and Duncan 1967), it remains to this day either an explicit or implicit backdrop to contemporary research on trends in social mobility (e.g., Pfeffer and Hertel 2015), gender inequality (e.g., Levanon and Grusky 2016), and racial and ethnic discrimination (e.g., Quillian, Pager, Hexel and Midtbøen 2017). In many cases, the liberal theory is used only to generate straw-person hypotheses that can easily be disconfirmed, indeed it has arguably become our favourite foil. It does, however, play a more positive role within some fields, especially that of social mobility.

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As useful as the theory-as-foil is, it is just as important to build theories of stratification change in which we can believe, a task to which we turn here. The purpose of our paper, then, is to develop a post-liberal theory of change in late-industrial societies that takes into account key dynamics that the liberal theory ignores or glosses over. This new theory will not presume the inevitable rise of merit-based recruitment, will not treat social classes as historical relics, will not assume that race, gender and ethnic discrimination must ultimately wither away, and will not assume ongoing 'occupational upgrading', increasing upward mobility, or widely shared economic growth. The landscape of real and existing late-industrial societies seems instead to be moving in more complicated and contradictory directions that our account will accommodate rather than ignore.

The core social fact around which we build our post-liberal account is the emergence of a new form of contested economic loss that supports solidary groups locked into zero-sum conflict. Although some attempts have been made to revise the liberal theory in ways that partially adjust to widespread loss and resistance, the premise of our paper is that any further efforts to merely revise or tinker are grossly inadequate given the magnitude of the problems at hand. In any theory's history, there comes a moment when the inconsistencies are too formidable to ignore, a moment that, we would argue, has long since passed for the liberal theory. The following is a partial list of fundamental problems that must be incorporated into any credible alternative to the liberal theory.

The ubiquity of loss: The starting point for our account is that a staple of the contemporary stratification world is widespread loss and decline. This loss takes many forms. It is experienced by children as a dramatic decline in their chances of achieving a standard of living as high as that of their parents (Chetty et al. 2017). It is experienced by men as a decline in the gender pay gap, occupational segregation, and other types of loss relative to women (e.g., Blau and Kahn 2016). It is experienced by manufacturing workers as a sharp loss in the number of high-paying union jobs (e.g., Rosenfeld 2010). It is experienced by 'rustbelt' families as a loss of employment and earnings to China and other countries (Autor, Dorn and Hanson 2016). The late-industrial experience is, in short, increasingly one of omnipresent loss and decline. Among workers who continue to do well, it is still likely that they will be exposed to stories of loss in the media or have children, parents, friends, or neighbours who have experienced loss. This omnipresent loss, whether it is experienced directly or indirectly, must be at the front-and-centre of any viable theory of late industrialism.

The ubiquity of resistance: In his classic satirical essay, Young (1958) argued that those who lose out in a putatively merit-based economy would have no choice but to blame themselves, as they view the economy as a fair arbiter that delivers failure only to those lacking in talent or effort. We are indeed seeing much of this expected self-blaming behaviour in the form of drug addiction, depression, and even suicide among populations that have been hit hard by loss (e.g., Case and Deaton 2015). The liberal theory failed, however, to anticipate

that those experiencing loss will often blame others rather than themselves. This externalizing approach takes the form of union workers blaming immigrants for undercutting them, downwardly mobile whites blaming blacks for 'unfair' protections, and struggling males blaming females for their deteriorating employment prospects. Although an externalizing move is the essence of contemporary populism, our task is not the currently very popular one of attempting to explain the rise of populism.[2] We instead treat populism as a given and seek to build a post-liberal theory that incorporates it. We do so by understanding the rise of populism as a form of resistance by those who, rather than accepting their losses, instead view them as illegitimate and cast them in zero-sum terms.

The ambiguity of merit: The fundament of liberal theory is that market rewards will increasingly be allocated to those who merit them. It has not been adequately appreciated that an intrinsic by-product of such merit-based systems is much contestation over who is or is not meritorious. Although all stratification systems come with some amount of disagreement over the fairness of the reward distribution, the amount of ambiguity is ratcheted up dramatically when such an ambiguous concept as 'merit' becomes the arbiter of fairness. If the legitimacy of one's claim over rewards instead depends exclusively on one's birth (as in a caste system, an aristocracy, and other 'pre-modern' systems), there is far less capacity for contestation. In an aristocracy, the markers of legitimate privilege are clear, as one can directly observe who is born a commoner and who is not. The concept of 'merit', by contrast, is intrinsically ambiguous and lends itself to disagreement over who is meritorious. With the transition to merit-based legitimation, we need a baseline theory that owns up to the resulting inevitability of strife and resistance, not a theory predicated on the impossibility of realizing a consensual definition of merit.

The rise of norm entrepreneurs: As Sunstein (1996: 23) famously appreciated, the social world is often more fragile than we imagine, with resulting opportunities for 'norm entrepreneurs' to mobilize this intrinsic state of disaffection and realize associated opportunities for change. The late-industrial world is chockfull of resistance and blaming in part because politicians, organizers, and other norm entrepreneurs (Sunstein 1996) are looking for opportunities to mobilize the disaffection that loss engenders. The liberal theory, animated as it is by mechanical forces rather than agents, fails to appreciate the role of such entrepreneurs (e.g., Trump, Sanders, Bannon, Corbyn, Le Pen, Farage) in creating coherent worldviews that can then mobilize resistance.

The rise of zero-sum groups: The job of norm entrepreneurs is to politicize loss by representing other groups as benefiting from it. It is immaterial from this point of view whether that zero-sum formulation has any scientific merit. If a loss of income or employment is successfully represented as a zero-sum transfer from one's own group (e.g., natives) to another group (e.g., immigrants), then the benefiting group is more likely to be treated as a competitor, especially when there is pre-existing antipathy between the groups (see Willer, Feinberg

and Wetts 2017). The political task of representing losses in zero-sum terms is of course much easier when, as is increasingly the case, many social policies and interventions have a zero-sum cast to them. The zero-sum metaphor, far from withering away, is yet another ubiquitous feature of late industrialism that the liberal theory never anticipated. We are left with a landscape of oppositional groups rather than the individualized, atomistic, and classless meritocracy of liberal theory.

The rise of income inequality: The key backdrop to this resurgence of zero-sum politics is the relentless increase in income inequality in many, although not all, late-industrial economies. If the liberal theory was unusually benign, it was partly because 'occupational upgrading', widely shared economic growth, and other sources of upward mobility were seen as blunting the pain of any personal loss. The late-industrial order is, by contrast, a world in which economic growth now goes mainly to the top, while the bottom of the distribution is fighting over the remaining scraps of growth. If growth were instead broadly shared, the pain at the bottom would be eased, and zero-sum rhetoric would likely become less attractive.

The post-liberal theory thus begins and ends with the simple point that large sectors of the population are experiencing profound loss. Although sometimes those experiencing loss will blame themselves for it, our theory will describe why loss is increasingly interpreted as a group-wide experience and increasingly represented as illegitimate. These developments will be shown to produce a stratification system with relatively solidary groups organized around their gains or losses and locked into zero-sum contest.

This slow drift into a Marxisant form of inequality suggests that liberal theory will ultimately come to be seen as but a transitory intellectual product of mid-twentieth century optimism. There is good reason to believe that, just as liberal theory dominated the latter half of the twentieth century, so too theories broadly inspired by Marxism will likely dominate the twenty-first century. The account offered here is Marxisant in the sense that it recognizes the loss-generating 'creative destruction' of late capitalism, the rise of especially concentrated forms of loss within well-defined groups, and the solidarities that then emerge as these groups come to represent their losses as illicit, unfair, and the outcome of a zero-sum contest in which the losers are losing *because* the winners are winning. The twenty-first century is tailor-made for a Marxisant account because, as will be shown, all of these conditions are as firmly in place today as they were in the nineteenth century.

Although these precipitating conditions were of course stressed by Marx (e.g., Marx and Engels 1848), no one would argue that they exhaust what it means to be a contemporary 'Marxist', at least as that label has come to be defined within the Marxist tradition (see Carver 2011 for a good recent review). It is also critical to build an updated version of Marxism that exploits recent advances in our understanding of culture and identity, labour economics, social

movements, behavioural economics, and social psychology. This is the sense, then, in which one might tag our work as merely Marxisant. As important as it is to acknowledge this Marxist heritage, we will nonetheless suppress most references to Marx and to Marxist scholarship, as we want to present our account in clear and unadorned fashion rather than burden it with sometimes scholastic debates.

The long shadow of Marx is of course behind the already vast literature on the turn to populism. It reveals itself, for example, in the ongoing debate among (a) those who seek to interpret recent electoral developments through the lens of culture and identity theory (e.g., Mutz 2018; cf. Morgan 2018), (b) those who seek to interpret them as a reaction to rising economic inequality and loss (e.g., Morgan and Lee 2018), and (c) those who seek to build a synthetic account of how culture, identity, and inequality work together (Gidron and Hall 2017; Hahl, Kim and Zuckerman 2018; Morgan 2018). This debate is only indirectly relevant because we are developing a theory about the larger forces of history rather than just the latest electoral cycle. Although recent events surely reveal some of these larger forces (and no doubt precipitated this article), one can easily be misled by the many idiosyncratic features of contemporary events when studying them alone. It should be uncontroversial, we hope, to suggest that the best approach to understanding the larger forces of history is to study the long sweep of history. It would surely be premature to take narrow-gauge analyses of recent events as some critical test of a larger theory that has yet to even be properly laid out.

The balance of our paper unfolds in three parts. We first show that the iconic liberal theory of stratification as well as more recent approaches fail to attend to the loss generated by late-industrial stratification systems. We then show that it is empirically misleading to ignore such loss given that, over the last half-century, large swaths of the population have experienced it. Because existing theories fail us, we next build our post-liberal theory, an account that rests on a contest between competing narratives about the legitimacy of loss and the resulting institutionalization of a zero-sum form of stratification. Throughout this analysis, we draw almost entirely on the UK and US cases, as they reveal the dynamics of late-industrialism in especially pure form. The dynamics that we are describing are, however, in play within *all* late-industrial economies, as the lower rates of growth that are part and parcel of late industrialism will very reliably trigger the rise of zero-sum politics (which are the centrepiece of our post-liberal account).

The liberal theory and its close cousins

We begin, then, with a brief review of conventional theories of stratification change, a review that makes the point that the many groups that have been 'left behind' by the contemporary economy cannot be safely ignored. In building

theories of trend, it is important to take into account such groups insofar as, by virtue of being left behind, they then react in ways that affect the trajectory of stratification systems. There are of course some conditions under which theories of change can legitimately ignore such groups. It might be hypothesized, for example, that the losing groups are ignorable because, after losing out, they will very likely be voiceless or powerless and unable to find allies who then indirectly give them voice and power. We will consider subsequently the conditions under which such a hypothesis might be borne out. In this section of the paper, we will simply ask whether conventional theories have factored losing groups into account, ignoring for now the equally important question of whether a case for doing so might be made.

We start our review with the so-called 'liberal theory' because it retains such a strong claim on the sociological imagination, even if it has by now entered that last phase in every theory's life-course in which influence is exerted largely in straw person form (Becker 1957; Blau and Duncan 1967; Kerr, Dunlop, Harbison and Myers 1960; Parsons 1951, 1954, 1971; Treiman 1970). The main claim of the liberal theory is that educational credentials, occupational positions, and income will increasingly be allocated on the basis of merit and achievements (e.g., educational qualifications) rather than ascribed traits (e.g., race, gender, class origins). This form of allocation will spread, so it is typically argued, because it efficiently ensures that positions are filled by those workers who are most productive. In his 'taste for discrimination' model, Becker (1957) showed that all forms of discrimination (e.g., race, gender) will gradually disappear because they entail paying a premium to the preferred class of labour, a premium that non-discriminating employers do not have to bear (thus giving them a competitive advantage). At the same time, the diffusion of computers and other 'skill-biased' technological changes is presumed to increase the demand for skilled workers, with the result that the payoff to schooling and other measures of skill should increase (e.g., Goldin and Katz 2010).

The latter economic accounts work in tandem with sociological ones that emphasize the diffusion of modern personnel practices in the form of universalistic hiring practices and bureaucratized pay scales and promotion procedures (esp. Parsons 1971; Treiman 1970; Meyer and Rowan 1977; Meyer 2010). The essence of such bureaucratic personnel practices is a formal commitment to universalism (i.e., treating all workers equally) and to meritocratic hiring and promotion (i.e., hiring and promoting on the basis of credentials). These practices are presumed to spread because they allocate workers efficiently (e.g., Becker 1957), because they are thought to allocate them fairly (e.g., Parsons 1971), or because they are viewed as projecting modernity (e.g., Meyer 2010). Although there are, then, all manner of stories that purport to explain the diffusion of universalistic practices, what matters from our point of view is not such debates about mechanisms but the widely shared – and ultimately misleading – presumption about the direction of the trend itself.

This benign vision of the late-industrial trajectory is often tied to the further claim that class, race, and ethnicity are becoming less important and encompassing identities (e.g., Clark and Lipset 1991; Inglehart 1990; Pakulski and Waters 1996; Kingston 2000). The 'working class' within the early-industrial economy was an especially prominent identity because political parties and unions carried out the ideological work needed to convert it into a culturally coherent community. The key claim, however, of liberal theory is that this identity became less central as (a) political parties abandoned class-specific platforms in favour of 'issue politics'; (b) unions became narrowly instrumental by focusing on tangible benefits rather than some transformative and politicized class narrative; and (c) rapid and widely shared economic growth undermined any residual attractiveness of such transformational narratives. In the absence of parties, unions or political entrepreneurs that explicitly cultivate group-based identities and worldviews, the purveyors of liberal theory assumed that we were moving towards a highly individualized form of inequality in which groups and classes that were once deeply institutionalized communities become purely statistical categories (see Weeden and Grusky 2005).

We will tag the foregoing account as 'liberal theory' even though it is in fact an amalgam of liberal theory with closely related theories of modernization and post-modernity (Kingston 2000; Parsons 1971), functionalism and the 'new institutionalism' (Davis and Moore 1945; Meyer and Rowan 1977), industrialism and post-industrialism (Kerr et al. 1960; Bell 2000), and skill-biased technological change (e.g., Goldin and Katz 2010). These various accounts do of course differ in important ways that have animated much debate within the social sciences. We will nonetheless gloss over these differences because, as will be seen, they are all relatively minor when cast against our new post-liberal account.

We do not mean to imply that all social science analyses of stratification trend are explicitly fixated on the liberal theory or its close cousins. Especially in the US, there is a strong constituency for a just-the-facts reporting style, which means that results may not be draped in *any* social science theory. This style, rather than being taken at face value, is in fact often concealing an underlying interest in liberal theory issues. In many US trend analyses, the 'American Dream' narrative is used as a foil and standard against which results can then be assessed (e.g., Chetty et al. 2014, 2017), an approach that lends a structure to the analyses that is virtually identical to those that explicitly reference the liberal theory. It does not much matter, in other words, whether the analyses are motivated by a formal social science hypothesis or by a wholly normative statement issued by early Americans or contemporary politicians (see Samuels 2012).[3] In either case, the resulting analyses are oriented around the foil that employment, promotion, or remuneration will increasingly be based on merit rather than ascription. The American Dream narrative, like the liberal theory and its analogues, may in this sense be understood as a blinder that impels us to focus laser-like on a very narrow set of questions, even as all manner of

more fundamental forms of resistance and zero-sum contest are playing out around us.

Although we have so far stressed that the liberal theory in its various incarnations is alive and well, there have of course been some challenges to liberal theory that *cannot* be understood as mere variations on a theme (see Grusky and Hill 2017; Goldthorpe 1996). For the most part, such critiques have proceeded by calling into question whether the effects of race, gender, or class origins will indeed disappear all that rapidly, a position borne out by recent evidence of long-run trends levelling off or even reversing in direction (e.g., England 2010; Ridgeway 2017; also see Gerson 2011). This stalling-out of trend might arise, for example, because equalizing initiatives can be successfully resisted by those who have the power and incentive to do so (e.g., Reeves 2017; see also Tilly 1998). It might also arise because some ascriptive characteristics, like an upper-class accent and other class-specific social skills, have a persisting or increasing market value (Jackson 2009; Jackson, Goldthorpe and Mills 2005). And it might arise because the withering-away of public goods makes it increasingly difficult for low-income parents to secure a fair share of opportunities for their children (Grusky and Hill 2017; Grusky and MacLean 2016; Hout 2016).

The various stalling-out narratives focus, then, on the intrinsic difficulty of realizing the liberal commitment to equal opportunity. As important as they are, they serve mainly to identify processes that oppose those emphasized by the liberal theory, indeed many trend papers are now structured as a competition between the liberal theory and one of the many 'stalling out' narratives. This is precisely what it means to use the liberal theory as foil and arguably speaks as much as anything to its staying power. For our purposes, it matters little whether the theory is used as a straight prediction or as a foil, as either of those usages distracts us from the equally fundamental dynamics of loss and resistance from below.

If theories of commodification and other 'stalling-out' accounts don't adequately feature loss and resistance, are there any accounts that do? It might be thought that the venerable literature on 'mobility effects', a literature beginning with Lipset and Bendix's (1959) seminal research and continuing to the present day (e.g., Daenekindt, van der Waal and de Koster 2017), is precisely the alternative theory that we want. It may be recalled that Lipset and Bendix worried that individuals who fail in their upward mobility projects might experience high levels of 'social and psychic distress' (1959: 286; see also Wright, Taylor and Moghaddam 1990). This is not just because, as Young (2001) famously put it, '[i]t is hard indeed in a society that makes so much of merit to be judged as having none' (see also Young 1958). Although downward mobility is, by this logic, especially painful when it is presumed to reflect on one's talents or capacity, Lipset and Bendix (1959) further emphasize that even upward mobility can lead to much stress because one's peers in the new class are not always very welcoming.

The nouveaux riches, for example, may find it difficult to gain acceptance from their peers, with the resulting rejection then leading them to feel 'frustrated, combative, or rootless' and ultimately motivating them to turn to various forms of political radicalism (Lipset and Bendix 1959: 285).

These types of problems, all of which refer to individual responses to individual troubles, do not help us to understand the types of loss that loom especially large today. Although no doubt much of today's individual-level mobility is interpreted in individual terms (e.g., Newman 1999), the characteristic feature of contemporary mobility is precisely that it can also be represented in collective terms, thus protecting it from the self-blaming response that Young (1958, 2001) worried would become dominant. We are referring, for example, to the perception that entire groups – especially women, racial and ethnic minorities, and immigrants – have been targeted by and benefited from ongoing social movements, legal protections, and government and charitable assistance (see Hochschild 2016). These initiatives, far from being seen as facilitating fair and open competition, are instead taken to provide unfair advantage relative to those who have lost out (Hochschild 2016). The resulting 'backlash ideologies' can of course be mobilizing. Whereas Young (1958, 2001) mainly worried that the losing groups, lacking any self-protective ideologies upon which to draw, would be left 'morally naked' in the modern world, we have instead seen a flourishing of protective ideologies that externalize blame and can legitimate various types of collective action. It is not always appreciated that Young's essay, featuring in the end a populist revolt, suggested the emergence of just such backlash ideologies (Goldthorpe and Jackson 2008).

The older 'mobility effects' account, fine-tuned as it is for a pre-backlash world, thus provides only limited guidance today. It is arguably more helpful to turn to a newer literature on trends in absolute economic mobility (Chetty et al. 2017; see also Bukodi, Goldthorpe, Waller and Kuha 2014; Chauvel 1998).[4] The latter literature, which reveals a precipitous drop in the amount of mobility, has been used by some commentators to suggest that rising intergenerational deprivation may support a turn to new ideologies, like populism, that are oriented towards rectifying that deprivation (e.g., Leonhardt 2016; cf. Campante and Yanagizawa-Drott 2016). From the point of view of conventional stratification theory, this approach is especially important because it draws attention to the importance of loss, although it focuses exclusively on intergenerational economic loss as opposed to other forms of relative deprivation that once figured prominently in sociological understandings of inequality (e.g., Runciman 1966; Rydgren 2004). In our own post-liberal theory, we will indeed feature declines in absolute economic mobility, but we will interpret them as but part of this larger pattern of loss.

We close this section by noting that recent worries about the job-destroying effects of automation may well come closest to anticipating an authentic theory

of loss (e.g., Thompson 2015; Karabarbounis and Neiman 2014; Brynjolfsson and McAfee 2014; Katz and Krueger 2016; Arntz, Gregory and Zierahn 2016; Lawrence 2016). There are growing worries that, even if automation has not yet had a net job-reducing effect, it may well have that effect in the future as new 'autonomous forms' of technology (e.g., self-driving cars) reduce complementarities and pose a more complicated threat to jobs. This account, like the classic Marxian one, thus focuses on a future that will be rife with intragenerational downward mobility as workers are displaced via automation, robots, and autonomous systems. It is a cautionary tale of a displaced class that, far from undergoing 'proletarianization' and transitioning to the low-skill sector, cannot find any employment and has no choice but to exit the labour force altogether. This displaced class is, in effect, playing the role of a modern-day *lumpenproletariat*. Although the automation account speaks directly to loss, it is focused more on potential losses than those already in play. It also focuses more on the possible precipitants of loss (e.g., automation) than the possible reactions to loss among those experiencing it. For these reasons, it is hardly the comprehensive theory of loss that we seek, even if it does at least point to a pressing need to develop one.

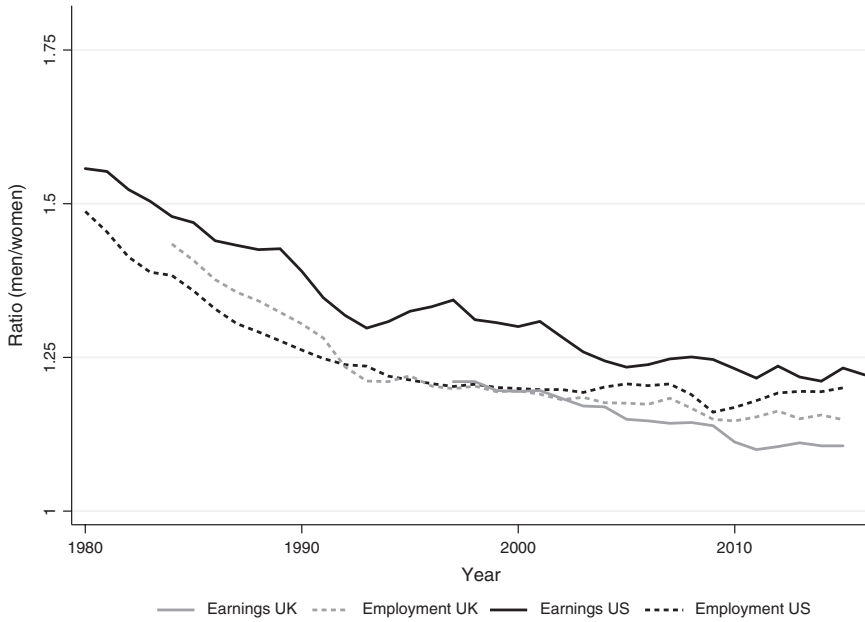
The upshot is that neither the liberal theory nor more recent accounts fully embrace the implications of ubiquitous loss and widespread resistance to that loss. The current theorizing does not address what might happen to the self-concepts of those that history has judged unworthy. It does not address how they might react to their losses. And it does not entertain the possibility that these reactions might then set in motion counteractive forces that make for a rather more complicated – and possibly less benign – future.

A half-century of loss

We have simply assumed to this point that large swaths of the population have indeed experienced loss. It is useful to document, as we will in this section, the various types of loss in play in the UK and the US. In the following sections, we examine the conditions under which these losses will lead either to (a) withdrawal from the labour force and other forms of disconnection (e.g., drug addiction), or (b) collective action and related forms of 'loyalty' (Hirschman 1970).

For each of our time series, we present the data in the form of disparity ratios, as doing so draws attention to the zero-sum interpretations that can activate and bolster a sense of loss. The employment ratios in Figure I are defined as m_t/f_t, where m_t refers to the employment rate in year t for men between 25 and 54 years old, and f_t refers to the employment rate in year t for women between 25 and 54 years old. In the corresponding earnings series, m_t and f_t instead refer to median weekly earnings in year t (for full-time wage and salary workers), where the median is calculated for similarly-defined adult populations in the UK and the US (see the stub to Figure I for details).

Figure I: *Ratio of male to female earnings and employment, for the United Kingdom and the United States*

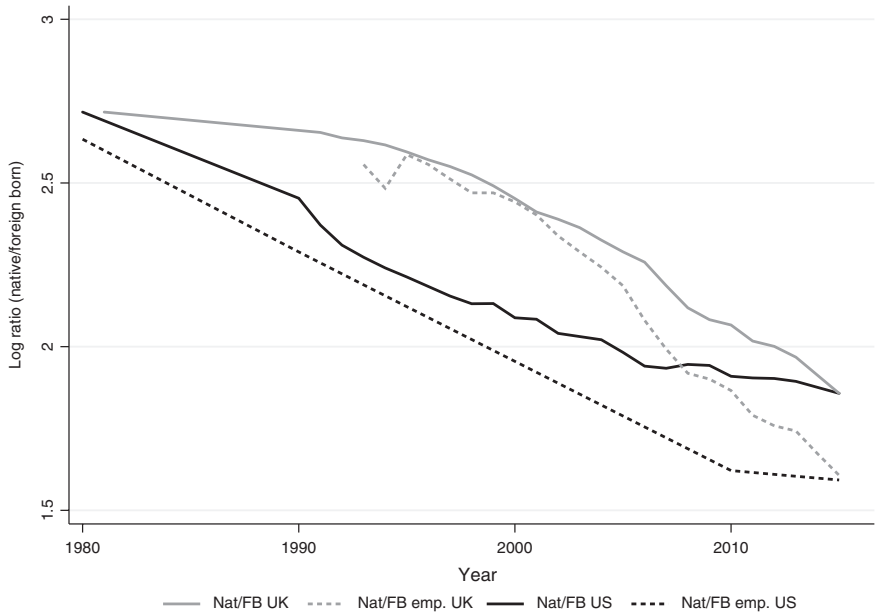


Note: For each country, we take (a) ratios of male to female earnings, and (b) ratios of male to female employment rates. Original data sources: UK earnings are drawn from 'UK earnings: median full-time hourly earnings, employees on adult rates,' Annual Survey of Hours and Earnings, Office for National Statistics; US earnings are drawn from 'Median weekly earnings of full-time wage and salary workers, ages 16 and above,' Current Population Survey; UK and US employment rates are drawn from OECD statistics on employment rates by sex, ages 25-54.

The four series in Figure I reveal sharp losses in earnings and employment for men (relative to women). Between 1980 and 2015, the US earnings gap declined by 59 per cent ((1.56 − 1.23)/.56 = .59), as did the US employment gap ((1.49 − 1.20)/.49 = .59). The UK series covers a shorter span, but over the available period it runs in rough lockstep to the US series (see DiPrete and Buchmann 2013 for a related discussion of the gender gap in education).

The next figure (see Figure II) presents trends in employment for the native-born and foreign-born populations. As before, the data are presented in the form of disparity ratios, with n_t pertaining to the native-born share of employed workers, and f_t pertaining to the foreign-born share of employed workers. We have taken the log of these ratios to suppress the sharpness of the decline and make the graph more legible.[5] In the US, the native-born share starts off some 13.9 times larger than the foreign-born share ($e^{2.63} = 13.9$), but it ends up only 4.9 times larger a mere 35 years later ($e^{1.59} = 4.9$). As Figure II shows, the UK experienced a decline that was roughly as large (i.e., n_t / f_t falls from 12.9 to 5.0),

Figure II: *Ratios of native- to foreign-born population, and of native- to foreign-born employment share, for the United Kingdom and the United States*



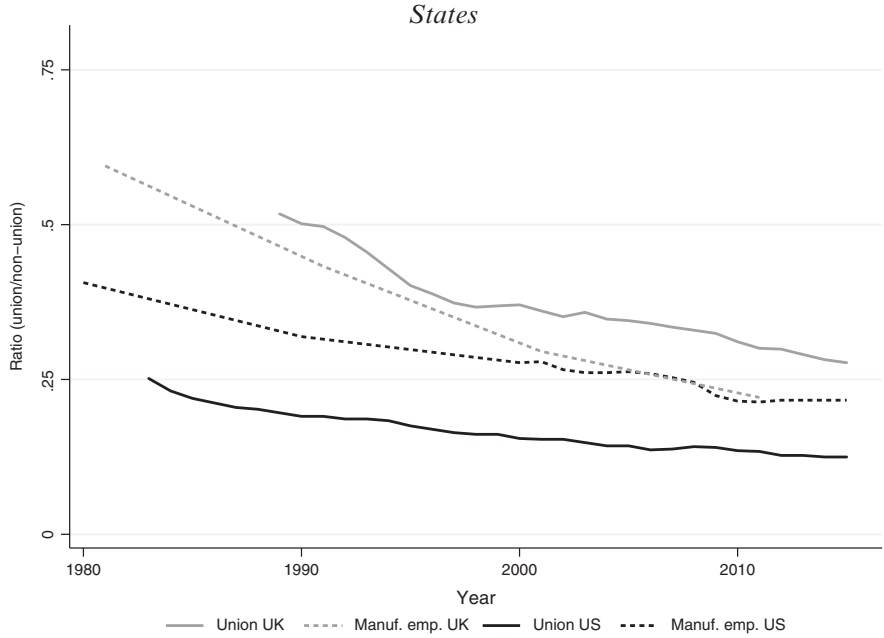
Note: For each country, we take ratios of (a) the percentage native-born to the percentage foreign-born, and (b) the native-born share of those employed to the foreign-born share of those employed. Original data sources: UK and US foreign-born are drawn from OECD statistics on per cent foreign-born (reported at: https://data.oecd.org/migration/foreign-born-population.htm); UK share of employed who are foreign-born are drawn from Labour Force Surveys (reported at: https://www.migrationobservatory.ox.ac.uk/resources/briefings/migrants-in-the-uk-labour-market-an-overview/); US foreign-born share of civilian labour force are reported at: https://www.migrationpolicy.org/programs/data-hub/charts/immigrant-share-us-population-and-civilian-labor-force.

but it occurred over a more compressed time period (i.e., from 1993 to 2015). The corresponding trends in population share are also very pronounced.

In Figure III, we turn to the equally precipitous decline in unionization rates, again presented in the form of disparity ratios. Although the decline in both countries is very sharp, the US decline starts from a much lower base rate (see Western and Rosenfeld 2017; Rosenfeld 2010). This decline in unionization is partly driven by the relocation of manufacturing to low-wage countries. Because of such relocation decisions, the decline in unionization is linked to a decline in the manufacturing sector, just as Figure III also shows. This decline appears in both countries but is especially stark in the UK.

The well-known backdrop to this result is the declining share of total income that is paid to workers. Since 2000, the share of total income going to labour has declined in every major private industry in the US, although the decline in manufacturing has been especially precipitous (see, e.g., Economic Report of

Figure III: *Ratios of unionised to non-unionised population, and of manufacturing to other industries, for the United Kingdom and the United States*



Note: For each country, we take ratios of (a) the percent unionised to the percent non-unionised, and (b) the share of manufacturing employment among all those employed to the share of non-manufacturing employment among all those employed. Original data sources: UK unionisation statistics drawn from 'Trade union membership as percentage of those in employment in Great Britain' (Labour Force Survey, Office for National Statistics); US unionisation statistics drawn from 'Percent of employed who are members of unions, aged 16 and over' (Current Population Survey); UK manufacturing statistics drawn from 'Proportion of those employed who are in manufacturing (energy & water, construction, and manufacturing) in England and Wales,' Census data; US manufacturing statistics drawn from 'Proportion of those employed who are in manufacturing,' calculated from IPUMS (proportion in variable ind50, values: 206-499).

the President 2013). The same trend may be observed in somewhat weakened form in the UK (see ILO 2015). It follows that native labour is not just losing out to cheaper labour from other countries but also to its employers.

The final figure, Figure IV, presents trends in absolute mobility in the US. Following Chetty et al. (2017), the absolute mobility rate is calculated by comparing the household income of children with that of their parents, with income corrected for inflation and measured at age 30 for each generation (see the stub of Figure IV for sources and details). We have presented this series via disparity ratios for purposes of comparability.

The results are again stark. The ratio of upwardly mobile to downwardly mobile children in the US falls from 10.8 to 1.0 over the last 44 birth cohorts. Although a comparable series is not available in the UK, the main forces behind

Figure IV: *Ratio of absolute mobility to immobility in the United States*

Note: We calculate the log ratio of percentage mobile to percentage immobile from the absolute mobility estimates of Chetty et al. (2017).

the decline, rising income inequality and declining economic growth, are also prominent in the UK (see Kalleberg 2013, Desmond 2016, and Edin and Shaefer 2015 for a related discussion of other types of precarity).

These four figures, as stark as they are, obviously do not exhaust the many forms of loss in the UK and the US. We have often had to resort to indirect or make-do measures because direct ones are not available in both the UK and the US. Moreover, because we have presented national averages for each type of loss separately, we have concealed the more concentrated and combined forms of loss in some populations, such as white native-born males in regions with historically high concentrations of manufacturing (e.g., the US Midwest, the north of England, and the Midlands).

The post-liberal alternative

We are now in a position to begin the positive task of building out our post-liberal account. The starting point in doing so is recognizing that loss of the sort described in the preceding section leads to strong and enduring resistance only insofar as it is deemed illegitimate. Within late-industrial economies, returns are deemed illegitimate when they exceed or fall short of the product of one's labour

(e.g., McCall 2013), a standard that takes us directly to the concept of rent. The key arbiter of judgements of illegitimacy is, in other words, whether 'rent' is being collected, where rent is defined as returns on an asset (e.g., labour) that exceeds what is necessary to keep that asset in production in a fully competitive market. By this definition, rents exist (a) when demand for an asset exceeds supply, and (b) when the supply of that asset is fixed through 'natural' means (e.g., a shortage of talent) or through social, political, or institutional barriers that artificially restrict supply.

The concept of rent thus refers to compensation in excess of what would prevail under perfect competition. This excess takes the form, for example, of sweetheart compensation deals for CEOs, the extra wages that union workers can secure when they are protected from competition with non-union workers, or the extra wages that privileged workers can secure when employers have 'tastes' for discriminating against blacks, immigrants, or other workers. In practice, it is very difficult to determine whether rent is being secured, but fortunately our analysis does not rest on any claims about our capacity to do so. We only care whether some groups *believe* that rent is being extracted and thus judge inequality to be illicit. If it is thought that CEOs are cutting sweetheart deals or union workers are closing off jobs from competition, then their compensation will likely be deemed illicit. This is of course because neoliberal economies come with built-in normative judgements to the effect that the competitive wage is the fair wage.

We are obviously not suggesting that the general public literally uses the language of rent. Instead, we are only suggesting that a commitment to full and open competition is a contemporary touchstone, with anti-competitive 'regulation' in all its forms then seen as illegitimate precisely because it undermines that commitment. It just so happens that the academic language of rent provides a useful formalization of those lay sensibilities and thus allows us to characterize them with some precision.

The most important type of rent is that arising from barriers that restrict the supply of labour (e.g., Red Bird and Grusky 2015). These barriers take the form, for example, of policies that prevent capitalists from using overseas or immigrant labour, that thereby shield native labour from competition, and that accordingly raise native wages above the competitive wage that would prevail if all labour could be fully exploited (i.e., 'country rent'). The upper class likewise secures rent when markets are regulated in ways that provide privileged access to the upper class (e.g., financial market regulations), when 'sweetheart' pay-setting practices are allowed for CEOs and other managers (e.g., golden parachutes), when high-quality schooling is meted out only to parents who can afford to buy it (either directly or via neighbourhood schools), and when other forms of social closure allow for returns in excess of what would prevail were free and open competition allowed (i.e., 'upper class rent'). The working class secures rent in the form of unions, minimum wage guarantees, and related institutional practices

that raise wages by rendering some types of contracts illegal (i.e., 'working-class rent'). And, finally, a host of 'ascriptively advantaged' groups secure rent in the form of pay discrimination, preferred access to human capital investments, and other uncompetitive practices that increase their remuneration and employment (i.e., 'race, ethnic, and gender rent'). These four types of rent (i.e., country rent, upper-class rent, working-class rent, race, and gender rent) imply that privileged categories of labour are being paid in excess of what would prevail under free and open competition.

The fundamental presumption of liberal theory, one which we will show is *very* misleading, is that the forces of history work in the main to reduce rent of these four types. To be sure, there are indeed some forces in play that advance this postulated rent-free outcome, but there are equally important countervailing forces that support very different late-industrial futures. We will make this case by first distinguishing among three stylized futures – a liberal rent-free future, a populist high-rent future, and an egalitarian partial-rent future – and then laying out the forces working on behalf of each of them (see Table I). We will further show that each of these futures come with associated political programmes that rest on competing claims about who is or is not securing rent. Because it is difficult to establish who is collecting rent, a normative system that relies, even implicitly, on judgements of rent is an intrinsically unstable and conflictual one. This source of conflict, which will be carefully laid out in the following discussion, has never been adequately recognized within the liberal theory.

The liberal rent-free future

We have critiqued liberal theorists for failing to appreciate that the liberal agenda requires massive institutional changes that will never happen of their own accord but must instead have a well-developed political movement behind them. Although liberal theorists have not referred much to this political undergirding, it is not of course because there is not such an undergirding. There is, to the contrary, a powerful neoliberal political movement at work to further the liberal agenda. If the liberal theory does ultimately come to fruition, it will be precisely because neoliberalism is its on-the-ground political arm.

How does the neoliberal movement take on the rent that, according to liberal theory, we can expect to gradually disappear? It adopts the 'doubling-down' view that rent is best addressed by rooting out barriers to entry and other impediments to competition that make excess returns possible.[6] The neoliberal prescription, for example, for eliminating employers with a taste for anti-black or anti-woman discrimination is simply to expose them to the full force of competitive pressure (see Becker 1957). In practice, the early purveyors of neoliberalism within the political class (e.g., Margaret Thatcher, Ronald Reagan) never treated race or gender discrimination as the most important threats, even though many scholars (e.g., Becker 1957) well appreciated that the doubling-down formula was in principle a tool that could be used to reduce these market distortions. The

main neoliberal target among the political class was instead the many forms of 'country rent' that are collected when native labour is protected from competition with either incoming immigrants or foreign labour (see Pierson 1994).

The balance of the anti-rent movement came, perhaps ironically, from progressivism of the sort now embodied in the centre-left parties of liberal welfare regimes.[7] This type of progressivism focused far more explicitly on rooting out racial, gender, and class-based inequalities of opportunity by (a) increasing access to human capital (e.g., school desegregation, early childhood education), (b) instituting legal prohibitions on discrimination (e.g., the Equal Pay Act, Race Relations Act, and Equality Act in the UK; the Civil Rights Act in the US), and (c) instituting employment quotas (e.g., 'affirmative action' in the US; 'positive discrimination' in the UK). The progressive narrative thus focused very explicitly on precisely those forms of rent (i.e., race, gender, class) that were not taken on by the earlier neoliberals. The two stages differed also in methods: the early neoliberal narrative focused on opening up markets and removing barriers to the flow of labour and capital (i.e., 'doubling down'), whereas the later progressive variant presumed that rent would likely persist without visible-hand reforms of education, labour market, and economic institutions. The visible hand was, it goes without saying, often *quite visible* (e.g., affirmative action 'quotas'), thus making the reforms more vulnerable to the reactive movements that emerged later.

The progressive movement, although initially less committed to taking on country rent, has gradually moved closer to embodying the rent-reduction commitment quite comprehensively. In both the UK and the US, this new globalizing commitment mainly took the form of reducing intra-continental barriers to the flow of labour and capital, with the US signing the North American Free Trade Agreement (NAFTA), and the UK committing to trade liberalization policies embodied in the European Union (EU). In effect, there has been an evolving marriage between progressivism and neoliberalism, a marriage that tidied up the ideology and allowed the rent-destruction narrative to infiltrate the movement and ultimately become a featured and unifying commitment (for relevant commentary, see Evans and Mellon 2016; Evans and Tilley 2017; Evans, Carl and Dennison 2017; Frank 2016; Hall and Lamont 2013). This marriage, because it made progressivism a much purer rent-destruction movement, in turn

Table I: *Inequality dynamics under late industrialism*

Type of rent	*Liberal rent-elimination*	*Populist rent-restoration*	*Egalitarian rent*
Upper class (UC)	Reduce	Increase	Reduce
Working class (WC)	Reduce	Increase	Increase
Race-Ethnic-Gender (RG)	Reduce	Increase	Reduce
Country (CN)	Reduce	Increase	Increase

opened up even more room for a new populist movement representing those who lost their rent.[8]

The case of union rent is perhaps more complicated, but even here it is clear that the growing rupture between progressivism and the union movement reflects some amount of ideological discomfort with rent, even those forms of rent that are inequality-reducing. This is precisely why native workers often feel abandoned by conventional progressive parties and have sometimes turned to populism (as discussed below). Although many progressives will still defend unions, typically on the understanding that workers need 'compensatory rent' to counteract monopsonies, it is gradually becoming a more lacklustre commitment, especially in the US.

This cleaned-up version of progressivism, which underlies aggressive policies in support of rent destruction (e.g., reduced trade barriers, affirmative action, anti-discrimination law, pro-immigration policy), led precisely to the losses represented in Figures I–IV. We once had rent-rich economies in which natives were protected from competition with immigrants, men were protected from competition with women, and union workers were protected from competition with non-union workers. The last half-century has, however, been nothing if not relentlessly rent-reducing, as indeed was shown by Figures I–III.[9] For a white male native in the skilled manufacturing sector, the total loss was typically very substantial, given that several types of rent destruction (e.g., gender, country, union) were simultaneously in play. These losses, as large as they often were, have not been heavily featured in either the liberal theory or any other conventional narrative of stratification change. Indeed, rather than focusing on how these losses might be experienced, scholars in the field typically problematized the extent to which illicit advantage remained. The cynic might argue that inequality scholars, convinced that their understanding of the illegitimacy of rent was self-evident, simply assumed that those losing out would go quietly. It is here that our Marxisant corrective, as laid out below, is crucial.

The populist rent-restoration future

The key question, then, is whether the losers have indeed gone quietly. The answer to this question hinges on whether those who suffered losses had any ideological weaponry with which to defend their interests and argue for a rent restoration project. The conventional view is that they did not. The losing groups were, as Young (1958) put it, 'morally naked' because their losses could only be interpreted as a consequence of their own lack of talent, effort, or capacity. This is precisely why the liberal theory and other conventional stratification narratives have been able to assume that the rent-destruction project would be an unopposed force of history.

It is increasingly clear that, quite to the contrary, these losses have instead spawned a powerful reactive narrative (see Wilson 2014 for a relevant discussion). How has this narrative been fashioned? It mainly rests on the argument

that the rent-destruction project has been implemented by installing new regulations that are corrupt, that 'overshoot the mark', and that in the end are rent-generating. This formulation shows up explicitly, for example, in discussions of reverse discrimination in the US. In a 2007 Supreme Court case involving voluntary school desegregation efforts in Seattle and Louisville, Chief Justice John Roberts (United States Supreme Court 2007) famously punctuated the opinion of the court with the aphorism that 'the way to stop discrimination on the basis of race is to stop discriminating on the basis of race'. The Seattle and Louisville desegregation initiatives are indistinguishable, Justice Roberts continued, from the original commitment to segregation in the South: 'Before *Brown*, schoolchildren were told where they could and could not go to school based on the color of their skin. The school districts in these cases have not carried the heavy burden of demonstrating that we should allow this once again' (United States Supreme Court 2007). This same sentiment is routinely expressed by public intellectuals. The president of the Center for Equal Opportunity, a conservative think tank, writes that 'Quotas do not end discrimination. They are discrimination. The law makes clear that race, ethnicity, and sex are not to be part of who gets a government contract or who gets into a university or where someone goes to school' (see NBC News 2009).

This account is not just the rarefied theory of intellectuals. In the US, 43 per cent of adults claim that 'discrimination against whites has become as big a problem as discrimination against blacks and other minorities', and as many as 60 per cent of white working-class adults make the same claim (Jones, Cox, Cooper and Lienesch 2015; cf. Borrell et al. 2007; also see Mayrl and Saperstein 2013). This result is also borne out in qualitative studies. In her research on tea party supporters in Louisiana, Hochschild (2016) argues that the supporters subscribe to a 'deep story' representing affirmative action, antidiscrimination law, and antipoverty programmes as officially sanctioned line-cutting by women, African Americans, and immigrants:

> You are patiently standing in the middle of a long line stretching toward the horizon, where the American Dream awaits. But as you wait, you see people cutting in line ahead of you. Many of these line-cutters are black beneficiaries of affirmative action or welfare. Some are career-driven women pushing into jobs they never had before. Then you see immigrants, Mexicans, Somalis, the Syrian refugees yet to come… Then you see President Barack Hussein Obama waving the line-cutters forward. He's on their side. In fact, isn't he a line-cutter too?

The 'line-cutting' metaphor, which Hochschild (2016) reports is widely embraced, expresses the sentiment that the country's main anti-rent initiatives are in fact rent-bestowing overcorrections. This interpretation of course accords well with a conservative worldview in which all forms of regulation, even those animated by an intent to eliminate rent, will in the end undermine the equilibrating forces of competition. The latter forces, if only left alone, were presumed

to very naturally eliminate discrimination and other forms of rent (e.g., Becker 1957). The visible hand of regulation, rather than speeding up this process, was instead viewed as overcorrecting and hence rent-inducing.

The same type of argument motivates populist objections to pro-trade regulation. The standard argument to which populists can and have turned is that their losses, rather than attributable to fair and open competition, have been exacerbated by unfair and uncompetitive tactics by unions, the European Union (EU), and other countries (e.g., currency manipulation, product dumping). This position was, for example, embraced wholeheartedly in the UKIP manifesto's (2015) statement on employment:

> In 2007, the Peugeot factory in Ryton, Coventry, closed and moved production to Slovakia. This cost 2,300 jobs. The EU pumped £78 million in subsidies into the new factory, while Brussels sat on a request for a UK subsidy of just £14 million, for two years. Prime Minister Tony Blair claimed the closure was the 'inevitable casualty of globalisation,' but in fact the EU had made a conscious choice to boost the economy of Slovakia, at the expense of the UK (2015: 41).

The UKIP position, then, is that British manufacturing workers were harmed because the EU provided unfair and anti-competitive subsidies to poor countries. Likewise, Trump has criticized existing trade agreements as unfair and uncompetitive, with much of his campaign rhetoric especially focusing on 'China's outrageous theft of intellectual property, along with illegal product dumping, and devastating currency manipulation' (Trump 2016).

The sceptic might suggest that we are overstating the case. It might be argued that contemporary grievances are more directly rooted in straightforward racial, gender or nativist animus than some intellectual rationalization to the effect that equalizing initiatives have 'overcorrected'. There is of course no denying the role of animus. But an animus-only argument fails to appreciate that animus gains power when it is wrapped in a sacred principle. The sacred principle is in this case a commitment to restoring fair and open competition and allowing talent to carry the day. If one believes, as most US populists do, that whites, natives, and men are intrinsically more talented and productive, then their losses become prima facie evidence that recent initiatives have overcorrected and prevented true merit from prevailing. It follows from this logic that, by restoring fair and open competition, the intrinsic merit of whites, natives, and men will be properly revealed and again generate the higher pay and employment rates of the past (see Coates 2017).

This essentialist view, which we know to be deeply held (Lamont 2000; Ridgeway 2016; Correll, Thebaud and Benard 2007), thus allows underlying animus to be recast as a commitment to fair competition. It is neatly packaged in a seductive story about overly aggressive reform efforts providing unmerited advantage to disadvantaged groups. According to Breitbart journalist James Pinkerton, the populists are in this sense just like the Silent Majority of the late

1960s, as both groups appeal to 'the tenets of the American Dream' and feel that they've been 'taken advantage of by others, mostly on the left'. The resulting populist backlash generates sharply defined groups locked in a zero-sum contest for resources and economic well-being. The very same losses that are viewed by one group as the result of regulatory overreach are viewed by the other as a wholly legitimate reduction in illicit privilege. The contest is energized precisely because each side has its principles.

It is important to recognize the seeming implausibility of the main alternative account of the populist project. It would imply that (a) those who have lost out (e.g., native white males) believe that their losses were wholly justifiable as the outcome of a 'fair and square' competition, and that (b) the populist movement is accordingly founded on simple self-interest (i.e., an interest in recovering *undeserved* rewards) rather than a 'rigged system' justification. Although some of those who have maintained a loss may well blame themselves and withdraw (see section below on 'withdrawal'), we are suggesting here that many instead exploited a populist narrative that argues, quite to the contrary, that their losses were undeserved (see Bobo, Kluegel and Smith 1997 on laissez-faire racism; also see Gelman and McCall 2016; McCall 2013).

The upshot is that, far from being left 'morally naked', the losing groups had all manner of ideological ammunition allowing them to externalize the sources of their losses and avoid blaming themselves. The critical development in this regard is that the language of rent was quite successfully redeployed to call into question the very interventions that were in fact rent-reducing. The extra income secured via these interventions might be dubbed 'pseudo-rent', a label that recognizes that (a) the losing groups represented affirmative action, antidiscrimination law, and related interventions as producing income for the winning groups in excess of what would prevail under a truly competitive market (i.e., 'rent'), and (b) this language is misleading because the discredited interventions, rather than delivering returns in excess of a competitive wage, in fact pushed returns closer to that wage. This is the sense in which we tag the narrative as a 'rent-restoring' one.[10] As best one can determine, a successful populist project would have the effect of restoring rent for whites, natives, men, and many others, even though its champions may aver that they only wish to correct for the regulatory excess.[11] For our purposes, what really matters is that both sides believe that they are advocating on behalf of fairness and the competitive wage, thus imbuing the conflict with ample ideological fervour. It is precisely this ideological overlay that explains why the losing groups have not, for the most part, gone quietly.

The egalitarian rent movement

To this point, we have outlined (a) a neoliberal movement that takes a principled commitment to reducing rent, and (b) a populist movement that takes a principled commitment to restoring rent. Is any hybrid movement also in play? In many late-industrial countries, there is indeed a third movement that stands

between the liberal and populist ones, a movement that commits to equalizing the within-country distribution of income, wealth, and other rewards. This 'nativist egalitarianism' movement takes a very instrumental position on rent (see Table 1). That is, the tendency is to side with the liberals when it comes to reducing rent at the top (i.e., the upper class), but to side with the populists when it comes to increasing rent at the bottom (i.e., the working class).

The egalitarians are thus pragmatists in the sense that they have no objection to using rent when it is harnessed to egalitarian ends. Like the populists, egalitarians will sign on wholeheartedly to restoring working-class rent (e.g., unions, minimum wage), indeed their commitment to working-class rent is arguably more authentic than that of the populists. Likewise, egalitarians typically side with populists in restoring country rent, as it again has the desired equalizing effect on the *within-country* distribution. This domestic brand of egalitarianism tends to anchor the left wing of the working-class party in liberal welfare regimes (e.g., the 'B. Sanders' or 'J. Corbyn' wings). By contrast, centrists within working-class parties are torn between (a) their commitment to egalitarian principles (which leads them to support unions and working-class rent), and (b) their commitment to reducing rent and increasing total output (which leads them to support globalization and open competition at the cost of working-class wages). The latter commitment, as we have shown, was until recently winning out within the Democratic Party in the US (e.g., B. Clinton) and the Labour Party in the UK (e.g., T. Blair), a development that then opened up room for authentically egalitarian movements (e.g., B. Sanders, J. Corbyn) that were fully prepared to use rent (e.g., unions, minimum wage) to assist the working class.

Although egalitarians will side with populists whenever a rent-restoration project has egalitarian effects (*within* their country), they part ways with populists whenever restoring rent has inegalitarian effects. The egalitarian and populist camps thus divide starkly on the matter of racial, ethnic, and gender rent. The populist project is to restore such rent while the egalitarian project, like the liberal one, is to work hard to reduce it. It follows that egalitarians are half liberal and half populist and can potentially siphon off support from either camp.

Class signatures

The liberal theory thus falls short because it fails to appreciate that the liberal agenda has many competitors. Should we nonetheless assume that, despite all these competitors, the liberal vision will nonetheless triumph? The answer to this question depends in part on whether the liberal vision 'delivers the goods' to the classes that matter most. If those with power are benefiting from the liberal vision, we might then be more sanguine about the future of the rent-destruction movement and conclude that the liberal theory will ultimately prove right about history's end point.

Table II: *Beneficiaries of changes in amount of rent collected*

Social class	*Liberal rent-elimination*	*Populist rent-restoration*	*Egalitarian rent*
Upper class	**-WC, -RG, -CN**	+UC	-RG
Adv. workers	-UC	**+WC, +RG, +CN**	-UC, +WC, +CN
Disadv. workers	-UC, -RG	+WC, +CN	**-UC, +WC, -RG, +CN**

Note: The signs indicate whether the amount of rent increases or decreases under each of the three programmes. We have listed – for each programme – the changes in rent that would benefit the class in question. The cells with bolded entries are those that offer the greatest benefits for each of the three classes.
Types of rent: WC: working class; UC: upper class; RG: race, ethnic, and gender; CN: country

It is accordingly important to consider who benefits from liberal, populist, and egalitarian projects. It will not be useful to carry out this analysis with conventional classes (e.g., Erikson, Goldthorpe and Portocarero 1979) because the contest between liberal, populist, and egalitarian movements does not support the development of such classes. This contest instead leads to a three-way cleavage between (a) an upper class comprising capitalists and high-level managers and professionals, (b) an advantaged working class comprising white male natives in the lower non-manual or manual sectors, and (c) a disadvantaged working class comprising non-whites, women, and immigrants in the lower non-manual or manual sector.[12] The question at hand is whether the liberal, populist, and egalitarian movements have a clear and present class bias when classes are understood in these terms.

We can address this question by examining which classes would benefit from changes in the amount and types of rent that are collected (see Table 2). The entries in Table 2 thus pertain to the types of class-specific rent that the liberal, populist, and egalitarian movements putatively deliver. The upper class, for example, has to choose between (a) a populist movement that will directly deliver rent to it (via, for example, advantageous taxes, 'deregulation', and other institutional changes) and (b) a liberal movement that benefits it by reducing working-class rent (e.g., deunionization), reducing country rent (e.g., trade agreements that provide cheaper labour overseas or via immigrants), and reducing racial and gender rent (e.g., antidiscrimination law that reduces the premium it must pay to white or male labour). The populists could of course commit to delivering so much direct rent to the upper class that it would opt to support populism as against a liberal rent-reducing vision that instead delivers indirect returns to the upper class. The indirect approach tends, however, to be preferred because capitalists so overwhelmingly benefit from deunionization, globalization, and other indirect processes. It would be difficult indeed to deliver as much in the form of direct rent. Moreover, because liberalism has never trained its rent-reducing commitment squarely on the rent secured by the upper class itself (e.g., sweetheart deals for CEOs), it has long been possible for the upper class to

benefit from the rent destruction wreaked on other classes without any risk of losing its own rent. If the capitalist class has an official ideology, liberalism or 'neoliberalism' would thus have to be it.[13]

The class signature of populism, by contrast, is decidedly working class, although it of course appeals disproportionately to the advantaged sector of the working class (i.e., natives, males, whites). This sector, which is promised rent restoration of three key types (i.e., country, working class, race-ethnic-gender), finds a home in populism that is just as attractive as liberalism is to capitalists. For the disadvantaged working class (i.e., immigrants, non-whites, women), an egalitarian platform will naturally be more appealing, as it offers the same commitment to reinstalling working class rent without at the same time supporting race, gender, and ethnic discrimination.

This is all to suggest that the three main narratives of late industrialism have a deeper class imprint than the 'death of class' advocates would suppose. In most countries, the formal political parties are burdened with legacies, commitments, and constraints that preclude them from embracing these narratives in pristine form, and the class voting that is actually observed is therefore quite weak (see Evans and Tilley 2017). The straightforward hypothesis that we would advance, therefore, is that class voting will increase whenever a country's political parties are led by charismatic political entrepreneurs who can deliver the liberal, populist, and egalitarian platforms in pure form.

For our purposes here, the more important point is that each of the three visions for the future have a strong class base, thus making the future more ambiguous than either liberal theory or literal Marxism would have it. Although it is unwise to bet against a liberal vision when the capitalist class stands to benefit so much from it, it is nonetheless possible that a substantial payoff in the form of direct capitalist rent could induce capitalists to sign on, at least temporarily, to a populist agenda (as in the US during the Trump era). As Table II reveals, other alliances can also be imagined, with the implication that our future is more susceptible to norm entrepreneurs and other contingencies than liberal theory or simplistic versions of Marxism assume. Whatever the ultimate resolution may be, it seems highly unlikely that we will reach it through the apolitical, mechanical, and conflict-free processes assumed by liberal theory.

A general model of recruitment

We have called into question a liberal theory that represents the forces for rent destruction as operating quite unopposed. Although the political forces behind liberalism are of course very strong, we have shown that those forces spawned opposing populist and egalitarian narratives that challenge the legitimacy of the losses brought on by rent destruction. The resulting contest between these three

narratives, which the rise of populism has very clearly exposed, is one of the main ideological struggles of our time.

We now consider the social psychological mechanisms underlying the process of recruitment into these competing movements. In the preceding section, we examined the winners and losers under each movement, with our analysis thus speaking to the underlying structure of abstract 'class interests'. It is well known, however, that an abstract analysis of interests alone is hardly satisfactory and that political recruitment rests on framing, political entrepreneurship, and a host of related social psychological processes. The purpose of this section is to lay out this recruitment process in these more embracing terms.

The approach that we take is best revealed by considering the forces underlying recruitment into the populist narrative. We have argued to this point that populists are generated when previously advantaged groups (i.e., whites, men, natives) experience sharp losses and interpret them as attributable to illicit political decisions (e.g., open immigration policy, affirmative action) on behalf of competing groups. Among members of the losing group, the rent-restoration narrative builds support for the view that (a) a competing group is benefiting from their loss (i.e., the 'zero-sum condition'), and (b) this competing group, far from deserving its newfound income, is the illicit beneficiary of rent.

This formulation is represented in Figure V. It shows that the ongoing contest between the rent-destruction and rent-restoration projects supports the development of a structured zero-sum form of inequality (represented here by the bottom pathway of Figure V). As shown in Figure V, the rise of this structured form is furthered by four forces, each of which we review separately below.

Loss: It is well established that loss is a deeply aversive event (Kahneman and Tversky 1979; Tversky and Kahneman 1991). From our point of view, what matters most is not that individual behaviour is often oriented towards reducing loss (as it is aversive), but that those who have experienced a loss tend to be deeply affected by that experience, to dwell on it, and to be motivated by it. The main output of the rent-destruction project, as shown in Figures I–IV, is to ramp up the total amount of loss. This loss may be personally experienced, discussed in the popular media, or directly observed in one's family, neighbourhood, workplace, or other network.[14] These types of loss are all *potentially* activating events.

Concentrated loss: How is that potential released? If those experiencing the loss blame themselves for it, it may well lead to withdrawal (e.g., labour force exit, drug addiction) rather than activation. This self-blaming response becomes less likely when many members of a well-defined group share the loss and become solidary around it. The rent-destruction project creates losing groups of precisely this sort (e.g., native workers, males, whites) by identifying them as illicitly advantaged and then intervening in ways that reduce those advantages.

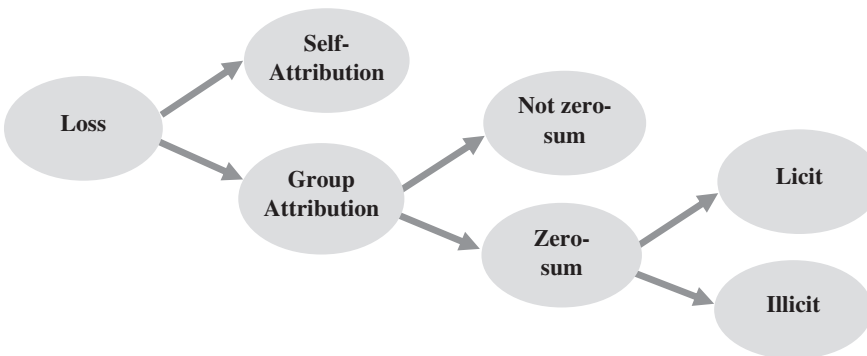
Zero-sum interpretation: The loss becomes *politicized* to the extent that another group is seen as benefiting from it. If a loss of income or employment is represented as a zero-sum transfer from one's own group (e.g., natives) to

another group (e.g., immigrants), then the benefiting group is more likely to be treated as a competitor, especially when there is pre-existing antipathy between the groups (e.g., Bonacich 1972; Olzak 1992; McVeigh 1999; also see Willer, Feinberg and Wetts 2017). The rent-restoration narrative provides members of the losing groups with precisely this type of zero-sum metaphor. It is immaterial whether there truly is a zero-sum relationship of the sort that the rent-restoration narrative claims (and indeed many, such as Peri 2014, have shown that there is not). It is beliefs alone that matter in understanding reactivity to the loss.

Illicitness: The benefiting group may, however, still be viewed as 'deserving' (by conventional societal standards of deservingness) in a zero-sum context. If the benefiting group is seen as more talented or harder working, then it becomes difficult to call their gains, even zero-sum ones, into question. If, by contrast, their gains can be represented as a form of rent (or pseudo-rent), then a legitimate basis for opposing those gains becomes available. The rent-restoration project thus provides some moral fervour to those experiencing loss (see Jost, Banaji and Nosek 2004 for a review of the conditions under which the status quo is seen as justified).

How does our theory differ from conventional 'materialist' accounts of populism and the trajectory of inequality regimes? It should be clear that it sharply differs from accounts that interpret populism as a simple anti-inequality movement in which the median voter finally becomes rational (see Manza and Brooks 2016). The available evidence suggests, to the contrary, that reactivity is fuelled by (a) the experience of loss rather than inequality, (b) the presumption that the loss, rather than being an idiosyncratic individual event, has been imposed on an entire group, (c) the further presumption that a competing group benefits from that loss, and (d) a belief that the winning group, far from deserving this

Figure V: *The Rise of a Structured Form of Inequality*



newfound income, is illicitly benefiting from a form of rent. Unlike median-voter theory and related materialist accounts, a rent-based account thus emphasizes that losses represented in zero-sum terms are a peculiarly activating form of inequality, especially when those losses are also seen as illicit. Because rent-reduction movements are fine-tuned for delivering losses that can be interpreted in precisely this way, they can be expected to inspire all manner of reactive rent-restoration movements (see Algan, Guriev, Papaioannou and Passari 2017; Bor 2017).[15]

Does culture play an important role in our post-liberal theory? The rent-restoration movement does of course draw heavily on pre-existing cultural scripts that define the main outgroups (e.g., ethnic or racial minorities, women, immigrants), presume that these outgroups have lower productivity, and thus represent their recent gains as illicit. If losses are to be successfully represented as zero-sum and illicit, much cultural work obviously needs to occur in support of these representations (e.g., Ridgeway 2017). At the same time, a standard 'cultural backlash' account also falls short, as it fails to appreciate the power of *combining* loss with these simple stories about their genesis (cf. Inglehart and Norris 2016, 2017). The rent-destruction project generated real and tangible losses (e.g., Figures I–IV) that then serve as fodder for the cultural project of rent-restoration. Although a zero-sum interpretation of these losses must be constructed, doing so is relatively straightforward given that rent-reduction initiatives typically serve to predefine the main outgroups (e.g., ethnic or racial minorities, immigrants) and provide some form of compensation or redress that suggests a zero-sum relationship with the main ingroups (e.g., whites, natives). Moreover, these outgroups are regularly singled out (and disparaged) in a variety of other institutional contexts, thus minimizing the amount of independent cultural work that ingroup members must undertake. The resulting rent-restoration movement, although drawing on much natural support of this sort, will be strengthened when explicit cultural packaging of zero-sum stories is further provided by political parties, politicians, public intellectuals, and civil society more generally (see Lamont et al. 2016; Ridgeway 2016; Willer et al. 2017).[16]

A note on withdrawal

We have emphasized to this point the conditions under which loss in the stratification system leads to the exercise of voice. In some cases, 'voice' may take a very limited form, such as a slightly elevated likelihood of voting for a populist candidate. This limited form of voice can, however, be immensely consequential when mobilized effectively, as in the case of the Trump, Brexit, and Le Pen campaigns. In other cases, loss will not lead to voice, but to withdrawal. As Hirschman (1970) recognized, individuals with a troubled relationship with an institution may either exit that relationship or voice their dissatisfaction, a choice influenced by their attachment or 'loyalty' to the institution.

This decision may also be affected, however, by the structural considerations laid out in Figure V. The starting point for withdrawal, as with activation, may be some form of loss, but it is a loss that leaves one 'morally naked' (Young 1958, 2001) and thus inclined to turn inward rather than outward. We have argued, via Figure V, that a loss is more likely to be inward-turning in the absence of (a) a group with which to commiserate, (b) an identifiable extra-individual cause, or (c) a compelling story about the unfairness behind it. This type of loss leaves individuals alone in the world with no one to blame but themselves.

The world is rife with losses that end in withdrawal. It is hardly the case that populism, which protects against withdrawal, has spread so widely as to avert it completely. Moreover, some losses may be so intense and substantial as to overwhelm any protective effect that populism might have, especially for those who are politically disengaged and resistant to political messaging. Even for the politically engaged, populism is typically not an all-consuming ideology with the protective effects of, say, a religious conversion. Although some politicians, perhaps particularly Le Pen, have sought to convert populism into a more encompassing ideology, it has clearly taken a weaker cast in the UK and the US.

It follows that one can expect much withdrawal in a loss-heavy society. In some cases, the withdrawal from mainstream institutions occurs in conjunction with a decision to enter an alternative subculture, such as survivalism. It is more worrying when loss leads to exits that are both private and self-destructive in character. What types of exits have these features? Most obviously, Case and Deaton (2015) have recently documented 'deaths of despair' in the US, deaths that may be attributable to a rise in just such self-blaming loss. Over the past decade, mortality rates of white Americans in middle age have increased, even as other racial and ethnic groups experienced declining middle-aged mortality. This increase in mortality, the most extreme form of withdrawal, is driven by drug overdose, suicide, and alcohol-related liver mortality (Case and Deaton 2017: 3). At the same time, less extreme forms of individualistic withdrawal may also be on the rise, and not just in the US (Barnett, Olenski and Jena 2017; Zin, Chen and Knaggs 2014). The opiate epidemic, for example, may be attributable to the loss of employment and the associated increase in disability take-up (Krueger 2016; Hollingsworth, Ruhm and Simon 2017). This epidemic suggests that the 'opiate of the people' has increasingly become opium itself.

Conclusions

We have introduced a post-liberal theory that opens up a raft of hypotheses about the amount of mobility, the effects of mobility, the sources of resistance, and the likely trajectories of change. This theory is intended, then, to open up

hypotheses rather than to settle prematurely on conclusions. We need to know more about the frequency of loss, the groups and regions that disproportionately bear loss, the types of loss they bear, and the most deeply felt forms of loss. We need to know which regions and countries are experiencing patterns of loss that are consistent with the liberal, populist, and egalitarian narratives. And we need to know more about the macro-level conditions, such as ramped-up economic growth, under which loss leads to withdrawal or resistance.

The liberal theory, by contrast, sets us on a prescribed formula of increasingly rote analyses that distracts us from these questions. It does not take into account the sharp loss of union jobs, the rapid fall-off in manufacturing jobs, the declining prospects of less-educated workers, and the many other forms of downward mobility. It fails to appreciate that, when merit becomes the universal arbiter, the legitimacy of widespread loss is readily called into question. It fails to ask what happens when the losing classes do not embrace their fate, do not go quietly without struggle, and do not accept history's judgement. It ignores the populist and egalitarian narratives that support this resistance, the zero-sum conflicts that stem from it, and the norm entrepreneurs who exploit it. And it does not consider the carnage that ensues among those who *do* accept their fate by withdrawing and self-sedating. This is the direct cost of a theory that represents change as evolutionary, apolitical, and automatic.

We have thus developed a new Marxisant theory that begins with the simple point that, for many, loss is an omnipresent feature of their lives. Although sometimes that loss will be interpreted in individual terms, an unappreciated feature of contemporary loss is that, for many of those experiencing it, a structural account will also be readily available and may be seized upon. Because the rent-destruction project has targeted the structural divides (e.g., race, gender, nativity) that produce inequality, it is an inevitable by-product of its success that loss will also take on a structural form. It follows that those who have historically been advantaged are now experiencing the erosion of those advantages and are part of well-defined groups that are sharing their losses.

It might be imagined that even those who see this larger structure behind their losses will nonetheless appreciate the legitimacy of the forces for change and thus 'go quietly'. The liberal theory and other conventional narratives evidently assumed that the logic of the argument for rent-destruction was so overwhelming that everyone, even those losing out, would embrace it. It would perhaps have helped the purveyors of liberal theory and other conventional narratives to have talked not just to academics and others fully persuaded by the legitimacy of rent-destruction. If they had additionally talked to those who were experiencing loss, they would have discovered that, far from going quietly, those who are losing out have reasons to view their losses in zero-sum terms and to challenge their legitimacy (Hochschild 2016). These conversations would have revealed, in other words, that those who have lost rent may be more sensitive to that loss than to the residual rent that they are often still extracting.

The politicization of loss is attributable, we have argued, to the rise of a populist rent-restoration project. This project, which has emerged in opposition to the rent-destruction project, proceeds from the view that disadvantaged groups have *unfairly* benefited from legal protections, egalitarian social movements, and government and charitable assistance. These initiatives, far from facilitating fair and open competition, are instead seen as overshooting the mark and providing unfair advantage. It is striking that the language of rent, shorn of the usual academic pretensions, is sometimes directly drawn upon by those who have experienced loss (Hochschild 2016). The contest between the rent-destruction and rent-restoration narratives, which the rise of populism has very clearly exposed, is emerging as one of the main cultural struggles of our time.

The structural fallout of this contest is no less important. The rent-restoration backlash has promoted the rise of sharply defined groups that see themselves locked in a zero-sum contest. This is surely not the 'end of history' (Bell 2000) that we were promised. And neither is it the individualized, unstructured, and non-conflictual stratification system that modernization theory envisaged and promised. It appears instead to be the beginning of a new era of high grievance, high conflict, and high ideology that, if one is forced to choose, surely resonates far more with Marx than with Parsons.

(Date accepted: June 2018)

Notes

1. The two authors of this essay are equal contributors (but we have listed Jackson first to counter the presumption that less senior authors play a secondary role). We benefited from an engaging discussion of populism with the members of the Successful Societies Program of the Canadian Institute for Advanced Study. We also thank Bart Bonikowski, Rogers Brubaker, Matt Desmond, Paula England, Corey Fields, John Goldthorpe, Maximillian Hell, Arlie Hochschild, Monica Prasad, and Robb Willer for their excellent comments on an earlier version of this paper. We are especially grateful to Andrew Miles and the anonymous reviewers for their trenchant commentary. The research for this essay was funded by Stanford University and the Successful Societies Program of the Canadian Institute for Advanced Research.

2. It would be difficult to add value to an already crowded and excellent literature on contemporary populism (e.g., Bobo 2017; Brubaker 2017; Bonikowski 2016, 2017; Hobolt 2016; Goodwin and Heath 2016; Antonucci, Horvath, Kutiyski and Krouwel 2017; Evans and Tilley 2017, ch. 10; Goodwin, Whiteley, and Clarke 2017; Gidron and Hall 2017; Inglehart and Norris 2016, 2017; Lamont, Park and Ayala-Hurtad 2017; McCall and Orloff 2017; Mudde 2004; Pierson 2017; Flemmen and Savage 2017).

3. In most liberal countries, an analogue to the American Dream is already in play or, at the least, in development. At the annual Conservative Party conference, Theresa May made frequent reference, for example, to her dream of a society in which it does not matter 'where you are from or who your parents are' (see https://www.c-span.org/

video/?435029-1/british-prime-minister-addresses-conservative-party-conference).

4. The research literature on relative mobility in the US is unresolved on the matter of both trend in class mobility (Mitnik, Cumberworth and Grusky 2016) and economic mobility (e.g., Davis and Mazumder 1945; Chetty et al. 2014). The corresponding literature on relative mobility in the UK suggests, by contrast, a decline in economic mobility (e.g., Blanden, Goodman, Gregg and Machin 2004) and a rough stability or even increase in class mobility (Buscha and Sturgis 2014; Bukodi et al. 2014; Goldthorpe and Jackson 2008; Goldthorpe and Mills 2004).

5. The careful reader will have noticed that Figure I pertains to disparities in group-specific employment rates, while Figure II pertains to disparities in shares of employment. The foreign-born employment rate is not very revealing for our purposes because it affects whether workers will emigrate. The disparity in shares of employment captures, by contrast, the extent to which natives are likely to see and be threatened by foreign-born workers.

6. There is of course a long history of meanings associated with neoliberalism (see Springer et al. 2016; Hall and Lamont 2013). We define it here as a political philosophy stressing that the state should focus on eliminating barriers to market entry and other competition-reducing practices.

7. We use the term 'progressive' to refer loosely to the centre-left politics adopted by the Labour and Democratic parties during the Blair-Clinton period.

8. It is nonetheless important to recognize that progressivism, although now tidied up in this way, remains an unwieldy movement. Are all progressives just as committed, for example, to reducing 'country rent' as to reducing rent based on class, race, or gender? In the US, progressives have had an especially complicated relationship to country rent, indeed they often support the free flow of incoming labour (e.g., reducing barriers to immigration) but then baulk when it comes to supporting the free flow of capital (e.g., relocating factories to low-wage countries). At the same time, there are of course many radical progressives who find it normatively unpersuasive to treat any geopolitical boundaries, even those of larger amalgamations (e.g., the EU, NAFTA countries), as defining some delimited class of workers about whom one should exclusively care.

9. We are glossing over here the massive rent-creation that benefits the small elite (e.g., CEOs, high-level professionals) at the top of the income distribution (see Weeden and Grusky 2013).

10. In Table I, we indicate that the populist narrative entails restoring *all* forms of rent, even upper-class rent. Although the case for upper-class rent is not typically featured in populist accounts, it does nonetheless appear in the form of arguments that the upper class has been punished by rampant egalitarianism and 'class warfare' and that the incentives for entrepreneurial activity and job creation accordingly now fall short of the true marginal return to such activity. This then leads to calls to increase the incentives for entrepreneurial activity back to the level that putatively prevailed earlier. In an effort to make this appeal seem populist, political entrepreneurs will typically emphasize the need to support *small* business, even if the proffered policies work in the main to support big business.

11. Although it is always difficult to make definitive empirical claims about what constitutes rent (see Grusky and Saez 2013), the best available evidence suggests that compensation for males, whites, and natives is still well in excess of what would prevail under authentic competition.

12. The main task of the class theorist, we would argue, is to build class schemes that are more than purely nominal statistical constructions. That is, just as economists have seized on a metric (i.e., money) that is deeply institutionalized in contemporary economies, so too sociologists should build class models that are deeply institutionalized in contemporary societies. For some purposes,

this approach will lead sociologists to adopt conventional big-class or micro-class schemes, as the categories appearing within these schemes may be institutionalized within training and labour markets. When the focus shifts, however, to politics and political movements, it is important to likewise shift the analysis to class schemes that rest on categories that are at risk of being activated in political settings (as opposed to training and labour markets). Although our simple three-class scheme meets that test, it is of course a very stylized rendition that glosses over many additional distinctions that have some political resonance but, for our limited purposes here, are usefully suppressed (see Bourdieu 1984).

13. It is also true that employers with very strong tastes for anti-immigrant or pro-native discrimination might oppose competition-restoring reform because it would preclude them from exercising their tastes. For employers without such tastes, one would instead anticipate an overriding interest in reducing labour costs by eliminating barriers to the flow of labour and capital, especially country-level barriers (as they offer the opportunity for unusually large reductions in labour costs). This is presumably why capitalists have historically been such ardent champions of neoliberalism.

14. As Fischer and Hout (2006) note, job losses can 'unsettle' those who remain employed, thereby extending effects well beyond those who are immediately affected. For each person who loses a job, Fischer and Hout (2006: 131–3) find that another two workers become fearful that they will soon lose their jobs.

15. These rent-restoration movements are of course tapping the sense of relative deprivation that arises in reaction to such deeply felt loss (e.g., Runciman 1966). Although losses of the sort described in Figures I–IV are likely to generate feelings of deprivation, our model adds content to a standard relative deprivation account by recognizing that (a) the rent-destruction project, by virtue of targeting particular groups, is generating a concentrated form of loss, and (b) the rent-restoration project, by virtue of defining this loss as the illicit outcome of a zero-sum contest, is energizing the response. The latter two processes politicize the feeling of deprivation and thus protect against withdrawal.

16. The sources of political activation are much more complicated than we can sketch out here. Although our objective is to examine the effects of the rent-restoration project on political mobilization, a more general account of activation would also have to address the role of parties and electoral systems. It is often argued that party strategy and related electoral system factors are the most important determinants of the rise of populist – and particularly far-right – parties (Kitschelt and McGann 1997; also see McAdam and Kloos 2014; López 2015; Bartels 2008). As Evans and Tilley (2017) have recently shown, the decline in class politics in the UK is attributable to a change in party platforms, not to a change in the underlying proclivity of voters to view the world in class terms (also Evans and Mellon 2016).

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