Identity
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ABSTRACT: Identity politics—how identities emerge, how they persist, and the ways in which they shape politics—have been topics of enduring interest to social scientists. In this chapter, we showcase recent work in historical political economy to show how identity shaped the development of the state, the ways elites used propaganda to activate identity cleavages, and the recent methodological and theoretical innovations in where and why historical identities persist and continue to shape politics. Studies of identity have typically focused on individual studies of preferences or structural studies of group contestation. We conclude with challenges for the field including how our assumptions about identity and preferences complicate our understanding of institutional development. Our survey of new HPE research also suggests that we should take more seriously a meso-level unit of analysis: the role of identity in institutional development, particularly state capacity.

Introduction

A vast literature in the social sciences focuses on the role of identity in politics. Scholars have sought to explain how identity shapes electoral behavior, political parties, government policies, social movements, and violence—and, in turn, how identity cleavages emerge and stabilize. Regardless of the specific type of identity in question, recent political developments in regions as different as North America, South Asia, and Western Europe have only further intensified the volume of scholarship on this topic.[1] In this chapter we focus on ways in which recent work in historical political economy is advancing our understanding of the interplay between identity, institutional development, and political behavior.

Before we proceed, let us first deal with what we mean by identity in this chapter. While identity in political science generally focuses on ways in which a group can be distinguished by "rules deciding membership and (alleged) characteristic features or attributes" (Fearon 1999), our focus in this chapter is on one construct that has garnered increased attention in recent years: ethnic or racial identity. Our interrogation of new research in HPE research on ethnic identity allows us to engage in depth with the methodological and theoretical innovations being made in this burgeoning field, but the lessons from these studies likely hold valuable insights for understanding other types of identity politics as well.[2]

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[1] Within this scholarship, research has focused on the emergence of social cleavages and the ways in which those cleavages shaped and stabilized electoral politics and party-systems, often taking a historical institutionalist approach to the emergence of identity politics in the western world (Lipset and Rokkan, 1967; Bartolini and Mair, 1990; Birnir, 2007). In the developing world instrumentalist approaches have sought to explain the rise of identity politics as being shaped by institutional incentives – identity groups emerge in order to give themselves the best chance at winning politics or placing their own into positions of power in order to redistribute goods from the state (Bates 1974, Posner 2005, Chandra 2007).

[2] See other chapters in this volume for an extensive discussion on race (Bateman, Grumbach and Thurston), ethnicity and conflict (Jha), gender (Grosjean and Teele), religion (Becker and Pfaff), and culture (Lowes).

While definitions of ethnicity are themselves contentious (see Brubaker 2004; Chandra 2006), we follow broad convention in defining ethnic identity as membership into a descent-based or more subjectively as "self-identification around a characteristic that is difficult or impossible to change, such as language, race, or location" (Birnir 2007, 66). Descent-based attributes have two intrinsic properties: constrained change and visibility (Chandra 2006) . The range of ethnic identities we focus on in this chapter include tribe, religion, caste, language, and race across a range of countries and cases.

Studies of identity politics grapple with several theoretical and empirical challenges. First, while we have considerable scholarship on how institutions shape the emergence of identity, and how identity in turn shapes state policies and public goods provision, we know less about how identity shapes institutional development, particularly the evolution of state capacity. This is in part because studying the interplay between institutions and identity is rife with challenges of causal inference. Second, studies of identity politics often assume that identities are relatively fixed and visible in the short-run, making them a relevant category for political mobilization. However, explaining where and why some identities become activated, the role of political elites and propaganda in their emergence, and their subsequent impact on political outcomes has proven methodologically challenging. Third, some questions necessarily require a historical lens, such as where and why some identity categories have persisted and remained relevant to political outcomes while others have not.

In this chapter we will focus on three ways in which HPE as a field has complemented pre-existing work on identity. A growing body of HPE research has provided new tools, data, and theoretical perspectives. We show that focusing on historical episodes of exogenous change such as externally imposed franchise extension or moments of state development, notably during war, can help highlight the ways in which identity concerns of elites and groups shaped institutions—a task that is inherently more complicated in contemporary politics where identities are often seen as being "played" or "produced" by actors responding to institutional incentives (Laitin 1998). In doing so we showcase studies that can pinpoint the mechanisms through which identity-based decision-making can *shape* institutions. Second, we discuss recent empirical innovations that make it possible to study when an identity becomes salient in politics using historical episodes of media expansion. Finally, we discuss a growing body of literature on the mechanisms through which identities persist and stay relevant to contemporary politics.

Throughout this essay we also seek to find common ground between different types of ethnic categories at work in different social contexts historically. We discuss recent works in American political economy and comparative political economy to showcase how racialized institutional development in 19th century America has parallels to caste-based developments in early 20th century India; how the tactics of antisemitic propaganda used by Father Coughlin in 1950s USA resonate with the tactics of anti-Muslim propaganda in early 1990s India; and how non-economic considerations shaping Arab rulers' decision-making resonate with those of Chinese emperors and European city-states. In this way, we put into dialogue disparate scholarship attempting to understand the preferences of actors motivated by a range of identity

considerations such as social rank in regions characterized by caste and race, loyalty in regions where clan or tribal links proved to be strategically useful to rulers, or piety in times of religious wars and expansion. In each of these cases we discuss how focusing on identity leads to outcomes that are not predicted by canonical models.

Identity and institutions

Scholarship on the development of the state, particularly state capacity, has been largely silent on the role of identity in state-building. Take, for example, studies of fiscal capacity, which are in some ways core to the literature on state capacity. Much of this literature that focuses on the Western European cases tends to be macro-historical in orientation, focused on factors like wars, geography, and colonialism (Besley and Persson 2011; Centeno 2002; Engerman and Sokollof 2002; Tilly 1992). One reason for this omission is that the extent to which group-based politics can shape extractive capacity is somewhat limited by the inability of rulers to ramp up capacity substantially in the short run (Soifer 2013).[3] To the extent that identity has been studied in historical development it is focused on the material concerns of groups and elites rather than on a non-economic identity.[4]

Multiple recent works in HPE have challenged this thinking. Within the conventional war-focused literature on state building in Europe, the work by Lisa Blaydes and Christopher Paik (2016) has shown that identity politics played a role in the development of the extractive state. As economic elites left cities across Europe to fight the religious crusades, rulers were more easily able to build institutions of extraction. They also show that places with greater numbers of religious fighters experienced more political stability, and these places also experienced greater extraction through crusade tithes—one of the first forms of "per-head" taxation in Europe. Focusing on the religious motives of elites and how their exit reduced barriers to state-building offers insights into the mechanisms through which war can successfully lead to greater extractive capacity.

Scholarship in other contexts has found similar relationships between identity and state-building. In Turkey, for example, Yusuf Magiya (2022) uses local-level tax data from the late 19th century in the Ottoman Empire to show that during inter-state wars administrative units with more

[3] Two notable exceptions are Lisa Blaydes (2018) writing about how sectarian identity shaped state-repression and everyday bureaucratic interactions in post-Saddam Iraq and Evan Lieberman (2003) on how racialized citizenship shaped intra-white coalitions in South Africa leading to better state capacity. A separate and robust literature on how ethnic diversity undermines public goods and policy-making in the developing world has focused on how identity weakens collective action, leads to taste based variation in public good preferences and how the overlap of economic and non-economic identities further exacerbate these trends. How identity matters to state-building is a burgeoning field (Habyarimanya et al 2009, Baldwin and Huber 2010, Lieberman and McClendon 2013).

[4] Mares and Queralt (2015) study how the landed elites initiated the income tax in order to shift burden of taxation to capitalist classes and also deferred democratization. Hollenbach (2015) focuses on land inequality in the study of tax capacity in Prussia. Garias (2018) and Garfias and Sellars (2021) focus on the role of economic shocks in state-building.

ethnically homogenous populations were able to collect more taxes and had more investments in fiscal capacity. This suggests that the conventional trope that “war makes the state” was mediated through the ethnic composition of the ruled. Similarly in China, Peng Peng (2022) finds that Chinese Emperors during the Qing dynasty’s reign between 1644 to 1722 were more likely to deploy co-ethnic bureaucrats to regions of the kingdom experiencing conflict. In contrast, they relied on meritocratically selected officials in areas where security concerns were less heightened. In this way, ethnic considerations shaped key state-building decisions during times of external and civil wars.

Historically oriented projects have some unique advantages in establishing how identity might matter to institutional development. Identity-based taxes, like a poll tax on minority ethnic/racial groups or crusade tithes, were explicit and observable, unlike implicit bias in contemporary outcomes such as the study of public goods or tax burdens. Second, in many instances, key institutional features—like per capita taxation, bureaucratic agencies or state census undertakings—were introduced for the first time following franchise expansion, conquest, or war, allowing for causal claims-making on how identity mattered to politics. Third, recent HPE research deploys a wide range of quantitative and qualitative data to consider the specific mechanisms through which identity matters to the development of good quality bureaucratic institutions.

For example, one strand of research seeks to understand how identity-based coalitions shaped institutions around extensions of the franchise that were somewhat exogenous to local politics. Suryanarayan (2016) shows that an episode of franchise extension to the tax-paying elite was associated with a weakening of tax institutions in Colonial India. She argues that the expansion of the franchise threatened the social position of high-caste Brahmans who feared the rise of lower castes into politics. They sought to weaken taxation to limit future redistribution and the desegregation of institutions to lower castes. In the United States, Suryanarayan and White (2021) show that the end of the Civil War and the emancipation of African Americans was associated with a weakening of tax capacity at the county level in the post-Reconstruction era, as elites built cross-class coalitions of wealthy and poor whites against taxation. Both these studies use historical data to construct measures of group-based inequalities to study how emancipation shifted caste/race-based preferences.

A related strand focuses on the distinctive role of non-economic identities that can lead to institutional outcomes not predicted by canonical models that focus on only economic interests. Identity can shape the quality of information the state can collect about its subjects. Research has shown that the ability to collect information is often contingent on sharing a language, eliciting the trust of subjects, or having reliable bureaucrats (Lee and Zhang 2019, Scott 1998). Rulers can more accurately collect information about their populations when ethnically homogenous populations are more legible to bureaucrats. For example, Magiya finds that in the late Ottoman Empire, administrative units were more likely to complete a census when they were homogenous. In imperial Russia, Volha Charnsyh (20022) argues that state officials faced greater barriers to collecting information from ethnic outgroups, particularly when they relied on intermediaries to give them information about their subjects instead of investing in bureaucratic

capacity directly. As a result, Russian Orthodox officials delayed and withheld public assistance during famines in the the late 19th century to districts with greater Muslim populations because they lacked information about Muslim communes. Similarly, Suryanarayan and White (2021) show that census collectors collected worse data from white populations in enumerator districts with greater proportions of African Americans after Reconstruction's demise. In each of these cases, ethnic identities shaped legibility and taxability, and ultimately the quality of public goods.

Identity can also explain who becomes a bureaucrat. Peng Peng's research on 17th century China shows that rulers made trade-offs between ethnic loyalty and competence, and chose co-ethnics when loyalty was more prized as a way to secure information in perilous times. In Nigeria, Johnson-Kanu (2022) shows that ethnic groups that were more English-educated had a first-mover advantage within the colonial bureaucracy. These ethnic groups continued to be over-represented in the bureaucracy a century later.

Rulers might seek to emphasize identity concerns even if they lose revenues in the process. Saleh and Tirole (2021) show that following the Arab conquest of Christian Egypt, the Arab caliphate levied both a non-discriminatory tax and a poll tax on non-Muslims that would be eliminated upon conversion. When faced with declining revenues, as large numbers of Christians converted to Islam, pious rulers called for even more conversions suggesting identity motives dominated economic ones. In the United States, Nancy Qian and Marco Tabellini (2022) argue that identity-based discrimination can shape the military state because the lack of inclusiveness in institutions can discourage voluntary conscription, weaken the war effort, and intensify identity-based cleavages. They find that Black Americans enlisted in the military at lower rates after the attack on Pearl Harbor in counties with greater level of anti-Black discrimination.

Identity and Propaganda

A different challenge scholars face in the study of identity politics is how exactly cleavages come to be activated and the role of elite persuasion in shaping ethnic, religious or racial identity formation. Studying the impact of elite appeals or persuasion can be tricky. First, we have to devise a way to measure people's exposure to an idea at a fine-grained geographic level. Second, we need to ensure that the exposure was not a consequence of picking places where people particularly susceptible to the idea could be found (i.e., the dreaded endogeneity problem). Third, given the explosion in communication, transportation and media technology, it is hard to study the marginal effect of an idea on people's behavior given all the propaganda people have already consumed in their lifetimes. And finally, even if we were to solve these challenges, we have the ultimate one: how do we convincingly show a link between identity-based appeals and people's political behavior?

Several new HPE studies tackle these challenges explicitly. In the United States, Desmond Ang studies the effects of a cinematic blockbuster, *The Birth of a Nation*, that opened in 1915. The movie presented a sympathetic fictionalized depiction of the founding of the Ku Klux Klan (KKK) during the Reconstruction era. Ang constructs a dataset on the date and location of the film's

roadshow-style release using local newspapers and trade reports. He shows that the release of the film led to sharp spikes in racial violence in the short-run. Counties were five times more likely to experience a lynching during the month of the movie's arrival. To address endogeneity concerns, Ang uses the presence of a movie theater in 1914, the year prior to the movie's opening in 1915, as an instrument for whether the county received the movie. He finds that the screening of the film increased a county's likelihood of having a KKK chapter ("Klavern") in 1930 by 60 percentage points.

Moving forward two decades in American history, Tianyi Wang (2022) examines the consequences of America's first populist radio personality, Father Charles Coughlin. A Roman Catholic priest, he blended economic populism, antisemitism, and fascist sympathies. Known as the "Radio Messiah," Father Couglin began his radio career in the 1920s and grew to amass a radio audience of 30 million by the mid-1930s. Wang studies the impact of exposure to Father Coughlin's radio program on voting outcomes in the 1936 presidential election. He uses unique data on the location and technical details of Coughlin's radio transmitters in 1936 in order to predict the strength of signals intercepted by radios in different counties—a measure of the intensity of listeners. He finds that a one standard deviation increase in exposure to Father Coughlin's radio program was associated with a reduction in FDR's vote share by about 3.8 percentage points.[5]

These studies of the U.S. case have striking parallels with research on the effects of propaganda in India. Focusing on the rise of the right-wing Bharatiya Janata Party in the early 1990s, David Blakeslee (2018) studies the *Ram Rath Yatra* campaign of 1990 where the party leader, L.K. Advani, traveled close to 10,00 kilometers in a truck decorated to look like the chariot of the Hindu god Ram. The principle cause of the campaign was to demand the demolition of a mosque and the construction of a temple and the campaign content was rich in religious symbolism, Hindu nationalist ideology, and anti-Muslim demagoguery. Blakeslee finds that electoral constituencies through which the yatra passed experienced a 5 percentage point increase in the BJP's vote share.

Taken together, these papers highlight key ways in which identity can intersect with propaganda to have major political consequences. They also collectively pay attention to the timing of the introduction of identity-based propaganda, the randomness in the spatial spread of the propaganda often due to technological or geographic oddities, and the mechanisms through which they come to shape political violence and electoral behavior. But to what extent does an identity, once activated in politics, persist over time and why?

Identity and Persistence

Another major area of interest for scholars of historical political economy has been persistence: how and under what conditions do events long ago still shape contemporary political outcomes? Some of the most interesting work in this tradition focuses on issues closely related to identity

[5] In a related paper, Wang (2022) shows how the proliferation of radio broadcasting mobilized Black political participation and activism in the South, even prior to the civil rights era.

like the origins and transmission of antisemitic attitudes and the legacies of slavery. Here we summarize some key findings from this literature and discuss future directions it might take.

One strand of research in this tradition has focused on the legacies of extractive institutions on development. One of the earliest examples of this kind of research, Acemoglu, Johnson, and Robinson (2001), demonstrated a relationship between historical European colonialism and settlement patterns and contemporary economic development. Another line of research examines the long-term consequences of the slave trade in Africa. Nunn (2008) shows that the African slave trade negatively affected economic development and Nunn and Wantchekon (2011) find that having ancestors who were heavily raided during the slave trade is associated with lower levels of trust in Africa today. Together these papers set research agendas on how racialized institutions shaped long-run trajectories of growth, inequality, and politics, leading to a robust debate on the persistence of institutions.

More recent scholarship has extended this line of inquiry into a range of topics of interest to scholars of comparative politics. One important area of research has been on the long-term consequences of historical antisemitism and the Holocaust for contemporary politics. Charnysh (2015), for example, finds that, in Poland, latent antisemitism from earlier time periods was related to EU accession in more recent times. In particular, she uses data measuring the size of the local Jewish population before the Holocaust, violence against Jews in 1941, and local opposition to EU accession in 2003, finding a relationship between the historical measures and more recent opposition to the EU. Far-right political actors used antisemitic arguments in making their case against the EU and these arguments were more convincing to voters in areas where antisemitism was strongest in earlier periods and transmitted across generations even after the destruction of local Jewish populations.

Homola, Pereira, and Tavits (2020) similarly examine the relationship between the German Nazi regime and out-group intolerance in present-day Germany. Using data on historical proximity to concentration camps, they find that this predicts intolerance, xenophobia, and support for far-right parties among Germans today. Other work links older antisemitism with the initial rise of Nazism in the 1930s, finding that pogroms during the Black Death were predictive of antisemitic violence and support for the Nazi party, among other outcomes, in the 1920s and 1930s (Voigtlander and Voth 2012).

In the American politics literature, a growing complementary body of scholarship has examined the long-run effects of slavery. Acharya, Blackwell, and Sen (2018) show a relationship between slavery in the pre-Civil War period and white political attitudes in the southern states today, an effect that holds even accounting for contemporary population characteristics. Using data on the county-level prevalence of slavery from the 1860 census—the last census before the Civil War that led to slavery's abolition—they find that whites in counties where slavery had been more prevalent before the Civil War are today are less likely to identify as Democrats and more likely to hold a range of anti-Black attitudes on issues like affirmative action and the racial resentment scale. They point to the decades following emancipation as a critical juncture where white elites, in trying to maintain a repressed class of Black workers, cultivated strong anti-Black attitudes in

the larger white population. They also present evidence that the mechanisms for the persistence of such attitudes were generational transmission (using 20th century data on the attitudes of parents and their children) and institutional reinforcement (by showing that slavery's relationship with present-day attitudes is stronger in counties where the mechanization of agriculture was slower to arrive, where there were more lynchings, and where educational integration was slower to happen).

Scholars have also extended the study of slavery's political legacies to other realms and time periods. Mazumder (2021), for example, shows how the legacy of slavery weakened welfare state development during the New Deal period. Using the same metric of slavery as Acharya, Blackwell, and Sen (2018), Mazumder shows that higher county-level prevalence of slavery in 1860 is associated with receiving lower amounts of Works Progress Administration spending during the New Deal era (a program that would have been particularly beneficial to Black residents), but notably this relationship is more muted for programs that involved greater devolution to local authorities.

Not all persistence studies have findings with such negative implications for marginalized groups, however. Using a dataset on civil rights protests in the 1960s, Mazumder (2018) finds that white Americans who lived in places with such protests were more likely to be Democrats and support affirmative action, as well as exhibit lower racial resentment, later on. This provides some counterbalance to Acharya, Blackwell, and Sen (2018), who find that 1860 levels of slavery was associated with opposite outcomes. This article suggests that collective action can, in certain circumstances, help to weaken these historical legacies.

In an effort to generalize beyond the American case (and beyond the particulars of slavery), Acharya, Blackwell, and Sen describe their work as an example of behavioral path dependence. Drawing directly on historical institutionalist scholarship on institutional path dependence, they argue that attitudes and behaviors, too, can follow path dependent processes stemming from events long ago. In this way, they directly relate their findings to research on other cases like those mentioned in previous paragraphs and suggest a generalizable theoretical framework for understanding work on identity and persistence.

Central Europe and the United States receive disproportionate attention in the persistence literature (Cirone and Pepinsky 2022), but some scholarship has examined the long-term consequences of identity in other cases. Suryanarayan (2019), for example, examines the historical underpinnings of poor voters supporting the political right in India. Using 1931 census data on upper caste Brahmin dominance among caste groups as a measure of status inequality, she shows that areas with greater Brahmin dominance in 1931 shifted to the right in the aftermath of a 1990 policy change enacting quotas for government jobs to lower-status groups. She further finds that Brahmins in areas with higher historical social dominance were more likely than Brahmins elsewhere to shift to the right.

One of the key strengths of HPE work focused on identity and persistence has been to show the long-term consequences of the factors that were noted earlier in this chapter as shaping

institutional development in the short run. Important challenges remain, however. Persistence studies related to identity politics raise complicated questions about how to theorize and understand identity across various contexts: across time within cases, as well as across cases. While identity in politics is often "sticky," it is not unchanging, and this raises questions about how to interpret the relationship between measurements based on evidence that can sometimes be centuries apart. Such measurements themselves are also prone to error. Indeed, historical measurements of identity groups might even be especially likely to be prone to measurement problems. As Abad and Maurer show, some HPE work on persistence has relied on historical sources that have been critiqued not just by recent historians, but even by experts at the time they were originally published. Their analysis of contemporaneous critiques of Murdock (1959), a common source for more recent quantitative studies of precolonial ethnicities in Africa, is particularly enlightening in this respect (Ibid., 39-40). While this might be an extreme example, it is likely the case that many standard sources for turning historical identities into data for regression analysis would be called into question by historians. As we note in the conclusion, greater engagement between HPE scholars interested in identity politics and scholars in more qualitative social science traditions, as well as historians, would be fruitful.

Conclusion

HPE scholarship on identity and politics has made several important contributions to our understanding of politics. In this chapter, we have pointed to three in particular. First HPE scholars have demonstrated the relationship between identity and forms of institutional development/state capacity often thought to be solely related to larger macrohistorical forces. Second, scholars have made important contributions to studying the emergence of identity, with particular focus on how identity-based appeals by elites contribute to the substance and structure of identity politics in practice. Third, research on persistence has shown how some of these short-term outcomes can also have longer-term consequences that structure the politics of identity even up to the present day.

Research on identity politics has typically focused on either individual-level behavior and preference formation; or macro-level studies that seek to understand how the economic and cultural characteristics of groups shape aggregate political outcomes like violence, voting or public goods. The studies discussed here suggest that we need to take seriously the role of identity at a meso-level in shaping institutions. From India to Turkey to the US, identity prerogatives of elites and groups shape the ways in which actors interact in these contexts, and condition the ways in which institutions evolve. Local ethnic dynamics, ranging from the role of caste in India to race in the United States, can help us understand the evolution of tax instruments, census bureaucracies or administrative agencies.

Future work on identity in HPE can also benefit from greater engagement with other approaches to historical social science research. One example is the literature in American political development (APD) that has developed largely separately. Novkov (2016) provides an overview

of work on APD, law, and identity in a general sense. There is a particularly large body of work focusing on race and APD (Bateman et al. 2023, Frymer 2016, Johnson 2016), including attention to how the southern states democratized (Johnson 2018, Mickey 2015), how the intercurrence of shifts in the party system and social movement environment led to a major partisan realignment on racial issues (Schickler 2016, Grant 2020), and how major wars both compelled and constrained the inclusion of African Americans (Kryder 2000, White 2019), among other topics of interest to HPE scholars. APD scholarship on Native American politics also made several contributions to our understanding of both identity and institutional development. Bruyneel (2004), for example, highlights how top-down extensions of national citizenship to Native Americans was resisted by some, raising complicated questions about tensions between tribal and U.S. national identities. Bloch Rubin (2020) describes the relationship between federal "Indian policy" and the growth of state capacity in the 19th century. Greater connections between HPE work focused on the United States and APD (and between HPE and historical institutionalist scholarship generally) could be fruitful, particularly in navigating disagreements between those who aspire to a single theoretical framework for understanding identity in politics and those who see race and caste, for example, as following distinct logics.

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