INSTITUTIONALIZING INEQUALITY:
FIELD CONDITIONS, INSTITUTIONAL BELONGING, AND THE DISTRIBUTION OF IDENTITIES

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ABSTRACT

The institutionalization of inequality represents an important research focus in various strands of the social sciences. Much theory has emerged within organization studies and economic sociology, and within intersectionality research. However, there has, as yet been only limited work on the micro-processes by which institutions create and perpetuate inequality at the individual level. This paper addresses this issue in terms of a new conceptual model that combines institutional theory on field conditions and Amartya Sen's capability approach. We describe how inequality is institutionalized in terms of the distribution of identity positions and opportunities at the individual level. Specifically, we suggest that the institutionalization of inequality is a product of various types of institutional belonging that leads to (cumulated) disadvantaged identity positions for the individual. Our work connects Senian theory on conversion factors, identity, and opportunity with established organization theory on fields and institutionalization processes to offer news insights into how patterns of inequality persist and may change.

Keywords: Governance; Cultural Norms; Networks; Identity; Institutional Theory; Power

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INTRODUCTION

Institutions are socially accepted systems of rules that make people's behaviours more predictable. While they imply some constraint on free will and choices, they are also enabling as they provide a secure space for transactions. In this brief essay we suggest that institutions always contribute to socio-economic inequality because they enable some individuals more than others. Such argument relates to a consolidated debate on the adversarial nature of legal rights, as e.g. investigated by Hohfeld, and during interwar American institutionalism (Fiorito and Vatiero, 2011). At the heart of such debate is the 'pragmatic view of law as a social institution' (p.200) and a relational approach that unfolds how any privilege and right has a correlative of no-right or duty (Hohfeld, 1913; 1917). In the simplest scenario, any legal right requires the enforcement of duties of others not to interfere (Commons, 1924). Yet legal rules do not only affect the directly involved parties. They also have social consequences (Fried, 1998) as they imply a distribution of "negative" freedom, else said of freedom from [state power] coercion: rights, privileges and power are upheld by imposing constraints on others. As institutions provide such rights, privileges and power through their enabling function, their design implies a delicate balance of 'liberty against liberty' (Hale in Fiorito and Vatiero, 2011:210).

While the mentioned debate focusses on property rights and on formal institutions (legal rights), we extend it in the following way (i) we enlarge the perspective from legal rights to institutions more broadly, which notably includes formal and informal institutions. We envisage (ii) any institution to imply a certain form of power which has (re)distributive effects on society; (iii) we build upon Amartya Sen's capability approach (1999) to dig deeper in the micro-processes through which institutions enable the liberty of some and constrain that of others.

Our analysis combines institutional theory rooted in economic sociology and organization studies with the capability approach to provide new insights on the micro-processes of how institutions produce (re)distributive effects on society. While intersectionality studies have a long-standing tradition of explaining inequalities in terms of socially constructed phenomena (Butler, 1990; Hamilton et al. 2019), they typically avoid developing a unified framework (Styhre & Eriksson-Zetterquist, 2008). Intersectionality research focusses on specific groups at the intersection of socially constructed identities, such as class, gender, race, disability or sexual orientation (Naples et al. 2019). Such research represents an important contribution to understanding how inequality in society forms at the group level, but it does not explain the individualized micro-processes through which this happens. In this paper we propose a new conceptual model that goes beyond specific categories to focus, instead, on the institutionalization of inequality in terms of the distribution of identity positions and opportunities at the individual level.

Within current organizational theory (Amis et al. 2017; Cobb, 2016; Gehman et al. 2016; Suddaby et al. 2018), inequality is a field-level issue. Fields are a specific area of 'institutional life' (DiMaggio & Powell, 1983,p.148), in which institutional processes, organizations and practices can be observed (Scott, 2014; Wooten & Hoffman, 2008). The "field" is therefore a preferred level of analysis within organizational theory (Reay & Hinings, 2005,p.351) because it allows for in-depth observation of key actors, resources and regulatory bodies (DiMaggio & Powell, 1983). Our conceptual model combines a field ontology in which structural factors are interdependent, with the ethical individualism that the capability approach proposes. The key juncture between the two ontologies is the 'institutional belonging' that ties specific individual identities to a given institution. Our perspective builds upon Sen's view that "it is important to give simultaneous recognition to the centrality of individual freedom *and* to the force of social

influences on the extent and reach of individual freedom (Sen, 1999:xiii; original emphasis). We expand on two strands of Sen's work, namely multiple identities (2006) and conversion processes (Chiappero et al. 2019; von Jacobi, 2019; Kuklys, 2005; Sen, 1987, 1999). Multiple identities stress that any single individual can simultaneously draw upon different identities (being a woman, a scholar, an activist, etc.). The Senian conversion process details how any person needs to 'convert' available resources into meaningful opportunities to flourish and fulfil her potential.

We conceptualize the institutionalization of inequality as a process by which a given set of field conditions enacts different types of institutional power (Lawrence et al., 2001) on individuals in society. We propose the concept of 'institutional belonging' as a form of identification (Sen, 2006; Jenkins, 2014; Whitbourne et al. 2002) wherein personal meaning and significance are linked to the position of an identity in a given societal hierarchy (Atewologun et al. 2016). Our conceptual model suggests, more specifically, that the institutionalization of inequality is the product of various types of institutional belonging that create a (cumulative) (dis)advantageous distribution of (own) identity positions. Access to more advantageous identity positions within social hierarchies will offer greater opportunities to flourish.

FIGURE 1 HERE

FIELD CONDITIONS AND IDENTITY

The concept of an organizational field is a key construct in institutional theory (Scott, 2014; Wooten & Hoffman, 2008). It is a structuralist representation of whom interacts with whom and under which rules. Key to such perspective was the notion of institutional logics - defined as 'socially constructed, historical patterns of material practices, assumptions, values, beliefs and rules' (Thornton & Ocasio, 1999, p.804). Institutional logics scholars focused on the effects that

broad organizing principles that characterize modern societies, including the family, the state and the market, have on institutionalization processes (Friedland & Alford, 1991). However, subsequent research has shifted the focus of analysis from organizing principles to the "institutional infrastructure" that underpins field conditions and activity (Greenwood et al. 2011; Hinings et al., 2017,p.165). Such institutional infrastructure is typically composed of three elements: governance mechanisms, cultural norms, and networks (Davis et al. 2005; Fligstein & McAdam, 2012; Friedland & Alford, 1991; McAdam et al. 1996; Scott, 1995). For the sake of our analysis, we combine the concept of institutional infrastructure with Amartya Sen's conversion process that sets the individual centre-stage instead.

For Sen (1999), the conversion process is a function of a confluence of factors that determine how an individual may transform available resources - which may be tangible (eg. money) or intangible (eg. knowledge) - into opportunities to flourish. From Sen's perspective, individuals may be constrained either due to insufficient access to resources or due to some other conversion factor - any individual or contextual 'trait' (eg. identity) - that restricts their capacity to convert the resources that are available into opportunities (Sen, 1987; Kuklys, 2005). For example, I may be an immigrant in a European city – and live in proximity to a library, so there are some (public) resources available. However, if I do not speak any language in which the available books are written – I cannot convert the available resource in the capability of reading and enlarging my horizons.

In Senian terms, individuals have more opportunities to flourish when they have access to multiple identities or 'versions' of themselves (Alvesson & Robertson, 2016; Brown, 2019; Goffman, 1961). This is because each identity is positioned within a societal hierarchy in different ways by the field conditions. Sen (2006) proposed that individuals potentially have

access to multiple identities that resemble a pool of available meanings, logics and scripts that determine their access to opportunities - for example, simultaneously being a woman, a mother, a teacher, a vegetarian. Moreover, these different identities experience different constraints in terms of the individual's ability to access opportunities and are also linked to different positions that an individual assumes within the societal hierarchy. For example, while an immigrant may be in a disadvantaged position due to language barriers, if she has technical skills that allow her to deploy some valued tasks, she can draw on that identity to improve her overall position within societal hierarchy.

As a result, having access to multiple and advantageous (in terms of societal hierarchy) identities represents a potential advantage in terms of accessing opportunities (Sen, 2006). Conversely, a limited amount of identities, or the cumulation of disadvantageous identity positions constrains the ability to convert resources into opportunities. We propose that Sen's work on identity and conversion factors allows to reimagine the individualized effects of how field conditions – and the institutional infrastructure defining them – institutionalize inequality.

INSTITUTIONAL INFRASTRUCTURE, POWER, AND INSTITUTIONAL BELONGING

Lawrence et al. (2001) propose a taxonomy of institutional power, that elucidates how structuralist elements constantly exert power on individual choices and behavior. We connect their taxonomy to the components of institutional infrastructure (see table 1) and propose that the mechanisms implied by power enactments – and the grip they have on individual aspirations and opportunities resembles an 'institutional belonging'. From a Senian perspective, one's institutional belonging becomes a contextual conversion factor that either enables or constrains the person's ability to convert resources into opportunities.

TABLE 1 HERE

Governance Mechanisms

Governance mechanisms[i] (McAdam et al. 1996; Davis et al. 2005) reflect the enactments of rules within society in relation to what is considered as acceptable behavior. Governance mechanisms are a natural 'home' of domination, which seeks to constrain certain types of actions and actors and to diminish their effectiveness *ab initio* (Lawrence et al. 2001; Lawrence and Buchanan, 2017). The enforcement of rules typically seeks to sanction actions framed as illegitimate and - for the sake of disincentivizing similar behaviors - relegates the delegitimized actors to stigmatized positions in society such as imprisonment. This means that governance mechanisms tend to define the standards that determine what are legitimate versus illegitimate identities.

Through the mechanism of typification, governance distributes identity positions in terms of who assumes a more advantageous or disadvantageous position in society. As a consequence, this will make many opportunities unavailable to disadvantaged identities. This happens through the 'typification of habitualized actions by types of actors' (Berger & Luckmann, 1966,p.54). Institutional belonging, here, affects the results of a person's ability to convert available resources into opportunities, because any individual identity assumes a more advantageous position within a societal hierarchy if it is compatible with the foreseen 'types' of 'habitualized actions' and 'actors'. Any typification is - necessarily - based on some kind of identity reductionism, e.g. associating a person to profession, gender, age group, or citizenship.

Cultural Norms

Cultural norms can be understood as the ways through which the normative framing or filtering of 'truth' occurs within society. They include the meanings, ideas, and belief systems that constitute the external world for an individual (Beckert, 2010; Denzau & North, 1994). Thus, the prevailing - or dominant - cultural norms affect how meanings are translated across society to establish what are legitimate values and practices. Conversely, cultural norms also determine which kinds of meanings are deemed illegitimate (Beckert, 2010) and, therefore, are likely to be marginalized (von Jacobi et al. 2017).

Cultural norms enact power discipline in processes of subjectification concerning what constitutes a subjectively desired identity. Subjectification relates to the sense-making that members of a societal group have of themselves and of one another (Foucault 1977; Lau & Murninghan, 1998; Wellman, 2017). Cultural norms therefore reproduce societal hierarchies through the enactment of *power discipline* to establish defined conceptions of 'truth' and 'rationality' *contra* other modes of cognition or of emotional experience (Voronov & Weber, 2016). This connects directly to Foucault who explored the role of culture in the construction of 'truth' in his concept of normalization - or controlled subjectivity (Foucault, 1977).[ii] The institutional power *discipline* contributes to the motivations that individuals draw upon for their actions (Knights & Willmott, 1989; Clegg et al. 2006) and affects the preferred choices of people, their desired identities, and their attendant perceptions of own agency options (Cooper et al. 2008; Lawrence et al. 2001). The maintenance of the power discipline of cultural norms can occur through systemic surveillance or the more decentralized efforts of single individuals that have internalized the desire for an identity and its attendant values and benefits via *subjectification* (Foucault, 1977). Cultural norms affect the results of individual conversion processes by exerting control over the perceived and desired identity position of an individual with respect to the social taken-for-grantedness to which they correspond. Dominant cultural

norms will disadvantage individual identities that belong to alternative - potentially competing - ways of framing meanings by providing access to fewer opportunities. This explains the marginalization of many populations identified as 'other' because of their alternative subjective experience of reality (e.g. Indigenous populations, ethnic minorities, etc.).

Networks

Networks can be viewed as repeating patterns of social ties (Ansell, 2006,p.75). They enact two types of power in processes that establish the desirability of an association with 'valued others.' The institutional belonging mechanism melts down to the influence of valued others on the perception of an individual's identity within a societal hierarchy. Accessibility of identity positions that are aligned with valued others implies greater network centrality in terms of network connections. Contrarily, where identity positions assume a disadvantageous position within such networks, a person will be dependent on the legitimation of others to access opportunities. In this sense, networks can reinforce or dismantle Foucault's model of controlled subjectivity. By definition, networks represent an inter-subjective model of the legitimation of identity (Stets & Burke, 2000; Wellman, 2017).

Networks specifically affect the conversion process through the societal hierarchy of *'valued others'* (Creed et al, 2014; Stets & Burke, 2000), whose legitimation preferences have a direct bearing on an individual's identity position. The institutional powers involved rely on a peer-to-peer dimension: *power force* implies overcoming the intentions and behaviors of others, without actively attempting to change their opinions (Lawrence & Buchanan, 2017). *Power influence*, contrarily, represents the ability of one actor to shape the choices and behaviors of others as 'inevitable' (French et al. 1959; Lukes 1974). Networks can also operate as spaces for the enactment of institutional control[iii] (Lawrence et al. 2001; Lawrence & Buchanan, 2017) by

shaping and reinforcing desired identities. This is a function of either attraction to the identity of peers or via peer pressure to belong to certain values or behaviors.

Interdependencies

Governance mechanisms, cultural norms and networks are interdependent: actors and their social ties are key mechanisms for shaping and diffusing cultural norms (Beckert, 2010). Moreover, networks typically convene the individuals, groups, coalitions, and collaborators that institutionalize fields. Governance mechanisms represent cumulative processes that lead to the institutionalization of specific cultural norms as a result of the dynamic interactions of competing networks. Networks speak about social relations that a person cares about and the human desire to identify with the legitimacies of dominant governance mechanisms and cultural norms. Individuals will therefore not only connect to cultural norms cognitively, but also emotionally as the meaning they enshrine will be linked to their sense of self and institutional belonging (Voronov & Weber, 2016). While governance mechanisms often explicitly determine the conversion processes, cultural norms and networks are likely to play more subtle roles in terms of the effects of fields conditions on the opportunities available to the individual to flourish.

DYNAMICS THROUGH AGENCY AND COLLECTIVE IDENTITY WORK

So far, we have largely considered the institutionalization of inequality in terms of a static conceptual model (Figure 1). We briefly outline a dynamic dimension to our model in which agency may emerge to change patterns of inequality in terms of collective identity work. Collective identity is constructed, activated, and sustained through interaction (e.g., discursive processes) among members of a community (Wellman, 2017). Of significance here are claims

that the emergence of a meta-level identity is likely to entail some form of social identity formation or transformation at the member level, but, more importantly, it would also involve processes of social construction and negotiation at the collective level, as members interact and negotiate ‘shared values, definition of the situation and plan of action’ (Fligstein & McAdam, 2012; Gecas, 2000: 100; Hardy et al. 2005).

Such agency is, however, contingent on the availability of multiple identity positions that allows critical self-reflection and reaction. This builds upon Friedland and Alford (1991) and, specifically, Stryker (1999, p.254) who suggested that 'the availability of multiple meanings, logics, and scripts can help actors to break free of a given taken-for-grantedness by revealing their mutable and socially constructed characters'.

According to Sen (1999, 2006), the distribution of opportunities to flourish today is also connected to the distribution of available opportunities in the future because of its effect on agency. Personal agency refers to the freedom to pursue one’s own goals and to bring about change. For an actor to be able to 'influence the world' (Sen, 1999,p.18) and to enact institutional agency, she also needs to 'apprehend' (Voronov & York, 2015,p.567) and formulate a critical opinion about the existing institutional taken-for-grantedness and the place she assumes within it.

Yet, as our conceptual model suggest, the institutionalization of inequality restricts the distribution of identity positions as a key determining variable. This makes inequalities systemic since it both establishes future inequalities in available identities and co-determines who is likely to be in the position to provoke change through institutional work[iv] (Baker & Nelson, 2005; Dew et al. 2011). Thus, when an individual is - today - relegated to a disadvantageous position in society, implying reduced access to alternative identities, her opportunities to act for change are also reduced.

We suggest that collective identity work can anyway develop, primarily through new cooperative behavior (DiBenigno & Kellogg, 2014) that increases the recognition of disadvantage tied to a specific identity position through social interaction. Collective identity work can challenge the existing institutional infrastructure in terms of a struggle over the relevant meanings between different (and potentially competing) identities and collective points of view (Creed et al. 2014; DeRue & Ashford, 2010; Lyons et al. 2017). This makes the established field conditions seem less inevitable to individuals (Seo & Creed, 2002,p.233) and has the effect of alerting 'people to the gap between the way things are and the way they might or should be' (Voronov & York, 2015,p.565 referring to Sewell, 1997; Weber & Glynn, 2006).

The renegotiation of identities can lead to opposing strategies, either by underscoring alternative interpretations of the identity positions associated with disadvantage or by directly overturning the legitimacy that perpetuates inequalities between identities in society (Lyons et al. 2017,p.624). This often takes the form of new meta-narratives that propose a changed order between past and present understandings (Ocasio et al. 2016): a new Foucauldian reading of 'the truth'.

However, the processes of identity renegotiation are typically constrained by regimes of political economy, as the renegotiation of the perceived disadvantage of one identity position will likely imply some loss of dominance of another. Those parts of society that benefit from the current status quo will typically use their dominant agency (and sometimes violence) to maintain field conditions in which both *objects* and *subjects* are constituted specifically to legitimize their own advantaged identity positions (Friedland, 2009). Consequently, in very unequal societies processes of identity renegotiation will likely focus on marginal resonance, rather than on opposition. This may ultimately lead to an increasing acquiescence to the dominant groups of actors instead of addressing the structural roots of their own disadvantage (Lyons et al. 2017;

Oreg et al. 2018). As a result, any collective identity work challenging the status quo will be constrained by the lack of recognition of alternative identity positions around which agency might mobilize and coordinate action.

CONCLUSION

In conclusion, our model stresses the importance of granting multiple identities to individuals, and to diversify the legitimacy criteria that define access to opportunities. Any patterns of 'reduction' of identities is likely to further institutionalize inequality in three ways. First, the reduction of the essential aspects of a person to a unidimensional identity (race, or nationality, or religion) can more easily be associated with symbolic degradation of their identity position (cf. 'othering' in Griffen-El & Oblasi, 2018; Jensen, 2011; Suddaby et al. 2018). Second, where (dis)advantage tends to be tied to a single, simplified typification (women v men; black v white; nationals v immigrants), multiple inequality effects may be tied to the same non-modifiable trait of a person to reinforce her (disadvantaged) identity position. This may lead to the perpetuation or, even, exaggeration of hierarchical patterns of inequalities through complementarities with multiple and reciprocally reinforcing lock-in effects around identity position (Wolff & De-Shalit, 2007). Third, the restricted access to a broader range of identity positions may hinder the identification of commonalities among people that could otherwise build new collective networks to increase agency.

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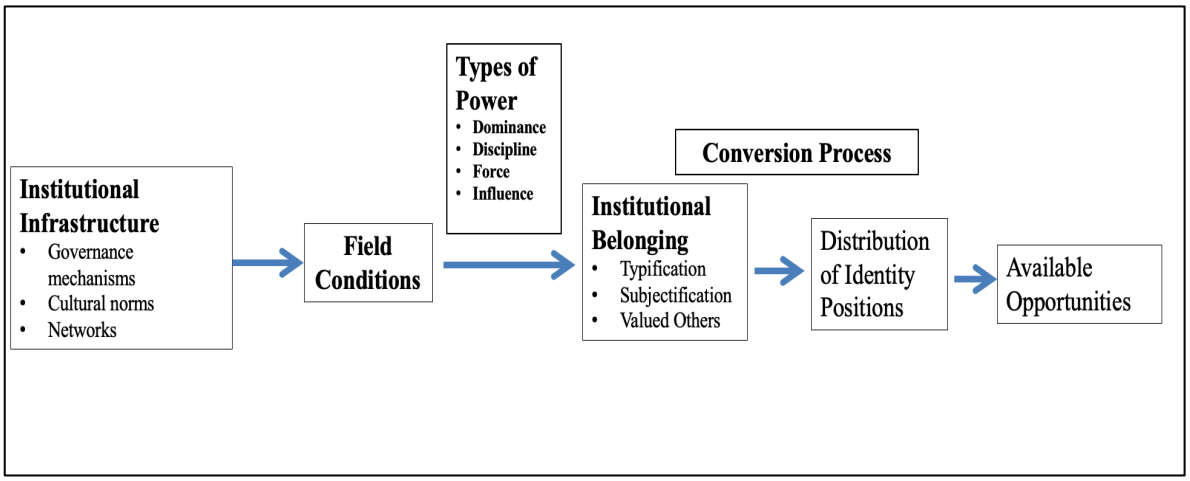
FIGURE 1:

Field Conditions and Inequality: Static Model



Source: elaboration by the authors

TABLE 1:

Institutional Infrastructure and the Conversion Process

		Institutional Infrastructure		
		Governance Mechanisms	Cultural Norms	Networks
	Institutional Power	*Domination* Uses rule-making to determine what are legitimate identities	*Discipline* Shapes the subjective experience of reality to establish preferred identities	*Force* Overcomes the intentions and behaviours of others *Influence:* Affects the choices and behaviours of others
Institutional Belonging	**Mechanism**	*Typification*	*Subjectification*	*Valued Others*
	Result of the Conversion Process: Distribution of Identity Positions	Defines legitimate identities	Shapes ideal identities	Constructs ideal identities through emotional practice and cognitive restructuring

Source: elaboration by the authors

ENDNOTES

[i] We here use 'governance mechanisms' referring to the social movements literature. This is different from 'governance' intended as 'government effectiveness, regulatory quality, rule of law, political stability, control of corruption, and voice and accountability to citizens' (cf. Kaufmann et al. 2010).

[ii] Cf. Clegg et al. (2006, p.21) seeing Nietzsche's 'influence' in Foucault's (1977) work on disciplinary knowledge.

[iii] Institutional control (systemic, 'top-down') is distinguished from institutional agency (bottom-up, episodic) in Lawrence et al. 2001. Lukes (1989, referring to Bachrach and Baratz 1963) comprises *coercion, influence, authority, force,* and *manipulation*.

[iv] Institutional work is understood to be 'the purposive action of individuals and organizations aimed at creating, maintaining and disrupting institutions' (Lawrence & Suddaby, 2006,p.215).