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## Race and Historical Political Economy

### Abstract

This article examines the study of race in historical political economy (HPE) research on the United States. Scholarship in race and HPE is wide-ranging, spanning the fields of political science, economics, history, and sociology, and featuring a diversity of theoretical and empirical methods. The article highlights key questions in the race and HPE literature, including democratization, the effects of slavery and segregation (both *de jure* and *de facto*), racial exclusion in the welfare state, and coercive state development. The article then circumscribes time periods under study: the Antebellum, Reconstruction, Jim Crow, New Deal, Civil Rights, and Post-Civil Rights periods. Finally, the article discusses limitations in the race and HPE literature and lessons that can be drawn from research in American political development and racial capitalism.

Keywords: race, political economy, slavery, segregation, civil rights, inequality

# Introduction<sup>1</sup>

In this chapter, we discuss race and historical political economy, with a focus on the United States. This is no easy task. In the U.S. case especially, the question of race permeates nearly all instances of political conflict. At the same time, political economy research has been less attentive to race than historical research in the fields of history, sociology, and American political development (APD). Accordingly, we advocate for a broad definition of HPE. Given the importance of structures and feedback in the development of racial categorization and hierarchy, we argue that it is critical to incorporate literature across disciplines, methodologies, and theoretical traditions into the study of race and HPE.

The chapter proceeds as follows. We begin by describing the development of research communities that contribute to questions of race and HPE. We then turn to specific research questions that animate much of the HPE literature on issues of race. First, how have race and racism shaped political institutions and public policies in the U.S.? Second, how have institutions and policies created and maintained racial disparities, inequalities, exploitation, and oppression? In reviewing literature on these two questions, we argue that an important deficiency in the HPE literature is insufficient attention to the instability of racial categorization and racial politics across geography and time. Accordingly, we turn to literature on a third question: the role of politics and political economy in “creating” race and shaping racial categories and identities.

## Constitutive Questions and Debates

The HPE study of race is the study of the causes and consequences of racism and racist practices, attentive to how these shape or are shaped by broader economic processes. This is a capacious definition, delineating as a field of study what in reality are multiple, and often only barely overlapping research communities, strikingly heterogeneous in focus, methods, and analytical orientations. Multiple intellectual traditions – among them radical political thought and critical history (eg., Du Bois 1999 [1935]; Robinson 2000 [1983]); institutional and labor economics (eg., Bonacich 1972; Naidu 2010; Boustan 2016); the new economic history of the 1970s (eg., Fogel and Engerman 1974); labor history (eg., Honey 1993); the new institutionalisms in economics, sociology, and political science; and recent work on the history of capitalism – have each made distinctive contributions. While these have never been entirely siloed, they are

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embedded within separate discursive communities that makes it difficult to speak of a single field of study.

There are nonetheless some unifying characteristics across much of this work. For one, HPE approaches tend to be observational rather than experimental. They also tend to place a greater emphasis on the rational bases of racist practices, rather than the psychological bases that for decades were the dominant focus in the social scientific study of racism. Where psychological explanations are invoked, they are often cast in an important but subsidiary role: as an explanation for why a particular racist political project gained adherence beyond the principal classes claimed to have an instrumental objective, or as a potential mechanism connecting racist behavior to a changing political economic environment (eg., Ransom and Sutch 2001 [1977]). Finally, HPE approaches often prioritize institutions, either as a focus of inquiry or as providing the context in which racist behavior or outcomes needs to be understood (eg., Frymer 2005; Frymer and Grumbach 2021; Schickler 2016; Trounstein 2018).

This work has also been characterized by questions and concerns that stretch across disciplinary divides. One which has loomed large is when racism should be considered a foundational and constitutive element of a given political economic regime or set of institutions; or as a factor “rationing” inequality (Harris 1972) within it. The distinction is obviously a blurry one, though of considerable significance. Other enduring questions include debates over how particular racial projects relate to different political economic classes or interests, and about the mechanisms by which these have been able to gain a wider adherence or operate beyond the specific periods and places of their emergence; and where racist attitudes or ideologies should be located in the causal chains connecting institutions and economic practices to unequal outcomes. Such questions provide points of connection across otherwise disparate fields, and have historically helped define a common set of concerns despite disciplinary differences.

Perhaps the most explicit claims that racism has been constitutive of a broader political economic order, rather than peripheral or an expression of its internal conflicts, have emerged from Marxist or other critical traditions, some of which have been categorized as part of a longer Black radical tradition (Robinson 2000 [1983]; Marable 1983). Many of these, however, have been picked up by other research traditions and broadly shaped debates across fields. Oliver C. Cox, for example, in his critique of “caste” theories of race, argued that racism emerged as an elite project for legitimizing colonial dispossession and slavery (Cox 1948). Racism continued to serve the function of legitimizing exploitation after emancipation in part through elites’ recurring construction of competition that fostered racial identities and antagonisms on a wider scale, and which inhibited effective opposition to capitalist exploitation. To analyze capitalism without racism, or vice versa, was for Cox to miss something essential about both.

Scholarship in this tradition has emphasized the role of elites in creating and sustaining capitalism’s “socioeconomic matrix of racial antagonism” (1948, 19; Reed 2002), or highlighted

how elaborate articulations of race converged with managerial capitalism at the turn of the 20<sup>th</sup> century, condensing racist caricatures of groups' capacities into a set of labor management techniques. Still others, building on W.E.B. Du Bois, argued that racism provided a mechanism through which favored-classes of workers consented to capitalism in exchange for a "public and psychological wage" (Du Bois 1935). In more material variations, whites divide the surplus extracted from racialized persons amongst themselves or defend it as a form of property with real material value (Atal 2021). Even absent a material bargain, racially privileged workers are said to gain psychologically, providing a political economic basis for psycho-sociological accounts that stressed relative group position. Some have largely removed elites from the equation, assigning causal priority to the interests or psychology of working-class and "poor whites," whether as a class interested in cartelizing labor markets for their own benefit (Bonacich 1972) or as most committed to social stratification with Blacks. Each of these attributes agency for the definition and practice of racism in a particular historical context.

Cox was not the first to provide racism with an origin story rooted in the political economic imperatives of slavery, coercive agriculture, and empire.<sup>2</sup> Eric Williams, for example, succinctly asserted that "no sugar, no negroes" (1944, 27), and this claim, never unchallenged, has similarly diffused well-beyond critical approaches. The implications drawn from it, however, vary considerably. Oscar Handlin and Mary Handlin agreed that American racism had emerged as a result of slavery, but rejected the notion that it was a deliberate political project, stressing the relative ease of securing African over English servants and the cultural and psychological associations that emerged between what increasingly took the form of slavery and "the trace of color" (1950, 216-17). Edmund Morgan, by contrast, concluded that not only had racism emerged as a deliberate ploy by slaveholders but, more sweepingly, that it had provided the necessary ideological and political context for understanding the new country's republican egalitarianism (1975). Agreement about sequence did not imply agreement about agency or significance.

Williams offered a different account of the foundational significance of racial exploitation, arguing that the transatlantic slave trade and enslaved labor on the sugar plantations provided the economic foundation for the commercial and subsequent industrial revolutions. Variations on the Williams thesis have gained new traction in recent decades. That enslaved labor was profitable and productive (Fogel and Engerman 1974) is widely recognized, though there remains considerable debate about its vitality by mid-19th century. There is now some agreement, though not consensus, that slavery was not just embedded within but was itself capitalist (Clegg 2015), that it was a productive and innovative sector (eg., Rosenthal 2018), and that it made lasting contributions to capital formation, labor techniques, and to the culture of the United States' political economy and to global capitalism.

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<sup>2</sup> By contrast, most post-WWII economic studies of racial discrimination held that it could not "begin in the economic sphere or out of purely economic motives" (Arrow 1971, 26).

Variations of these claims have gained prominence in the new history of capitalism research community (Baptist 2014; Beckert and Rothman 2016). Providing both local and global histories, this literature has found in racialized slavery a constitutive feature of the US and global economic order. This field has inspired considerable criticism and debate (eg., Olmstead and Rhode 2018). But it can be understood as connected to a broader trend within HPE to discover the roots of contemporary institutions, economic patterns, or political attitudes or outcomes in long-run processes associated with slavery and colonialism.<sup>3</sup> Historians have contributed to quantification of historical data on slavery and the slave trade, but have sought to do so while retaining an attention to racism, the lived experiences of those living under slavery and colonialism, and their effect on broader cultural practices and understandings. Critical debate will hopefully encourage greater cross-pollination of ideas and findings.

Claims about the ideological and material significance of racism to political economy have in recent decades converged in the heterogenous and interdisciplinary literature on racial capitalism. These accounts place an even greater emphasis on racism's foundational and constitutive significance to political economic life, and that that "racial subjugation is not a special application of capitalist processes, but rather central to how capitalism operates" (Harris 2021, 4). In some variations, the origins of racism are pushed back to the medieval era and antiquity. Cedric Robinson has argued that capitalism emerged out of distinctly racialized processes of primitive accumulation in feudal Europe, whose racial patterning was then extended onto a global scale (Robinson 2000 [1983]). Like earlier accounts, the racial capitalism literature emphasizes the instrumental value of racial hierarchies, the significance of historical acts of primitive accumulation, the global and imperial character of racist political economic projects, and the ways in which racialized subjects have resisted these projects. But as with an older literature that framed the "ghetto" as an "internal colony," this scholarship emphasizes racial hierarchies' intrinsic connection to *ongoing* processes of coercive expropriation and dispossession, ranging from gentrification to the carceral state (Gilmore 2007; Beckett and Francis 2020; Taylor 2019). Racist violence and dispossession, in these accounts, was not just generative for the emergence of capitalism, but is constitutive of it today.

## The Effect of Racism on Institutions and Policies

Questions of constitutive significance, agency, and motive can lead to greater dialogue across different disciplines. This is perhaps most productively done through a focus on how racism, race, and racist inequalities have shaped historically specific institutions and regimes or have been reproduced and sustained by these institutions.

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<sup>3</sup> For a discussion of the growing legacies literature, see Chapter —TK.

Collectively, research on the significance of racism to institutions and institutional change has profoundly enriched our understanding of political and economic history. This is perhaps most true for the United States.

## The Revolution, the Constitution, and US Statebuilding

Morgan's claim that slavery and racism made it possible to envision republicanism has already been mentioned (Morgan 1975). Recent scholarship has identified additional ways in which slavery and settler colonialism pushed forward the revolutionary movement. British abolitionism was not likely a major motivation, but there is abundant evidence that slavery and desires for indigenous lands deeply affected how different constituencies evaluated the conflict with Britain (eg., Holton 1999).

Slavery and settler colonialism's contribution to the emergence of a revolutionary coalition is difficult to determine empirically. Their significance for the US Constitution, for which we have rich, if incomplete, records of debate and voting, allows for more grounded accounts. We know that many of the delegates to the convention believed slavery to be a critical axis of division, and that efforts to protect it informed numerous provisions, including some which might not initially appear to be related to slavery (Finkelman 1996).

HPE work has examined the underlying structure to the convention voting and mapped the personal and state characteristics of delegates to their preferred positions. While not one of the principal estimated dimensions of conflict,<sup>4</sup> bargains over slavery likely helped secure the "Great Compromise" (Pope and Treier 2011), which was essential to ratification.

The importance of racialized slavery for the US's Constitution was profound, albeit complex and not unidirectional. The same can be said for the importance of racialized slavery and racial hierarchies in state-building more generally. For Robin Einhorn (2006), slavery's significance has been to deliberately weaken state capacity and constrain the degree to which states could raise taxes or apportion them fairly (see also Lieberman 2003). Pavithra Suryanarayan and Steven White (2021) agree about the direction of racism on state capacity, but treat bureaucratic weakening as an effect not of slavery but of elite efforts to undercut the redistributive threat posed by Black enfranchisement after the Civil War. David Ericson, by contrast, highlights how slavery often drove forward US state-building, strengthening its capacity to police its borders, its internal policing, the military and with it the power of the federal government relative to the states (2011).

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<sup>4</sup> Slavery shaped positions and outcomes on a range of issues, and lower South delegates were often empowered by the multidimensionality of voting (Dougherty 2020; Pope and Treier 2011).

US institutions were shaped by race and racism in other ways as well. Paul Frymer (2017) recovers strategic efforts of US state-builders to use land policy to contain the indigenous nations and the limits it faced in Indian Removal and the colonization of free persons of color. These different policies reflected a broadly shared desire to achieve a homogenous white population, one which – once embraced by whites in the post-abolition South – limited the prospects for extra-continental imperial projects.

Racist institutions and commitments could both constrain and push forward state-building.<sup>5</sup> Conflicts over racial projects repeatedly led both opponents and supporters to mobilize the state in pursuit of their aims (King and Smith 2012). No matter how much antebellum state-builders might have preferred to keep slavery out of national politics, for instance, they repeatedly turned to the federal state and to political allies across the country to grapple with it; slavery and race were too important material and ideological concerns for it to have been otherwise. At the same time, federal administrators beyond the center were embedded within local milieus whose racial hierarchies were normatively valued and exerted a powerful effect on labor markets and economic activity (Ericson 2011). These became embedded in state practices, sometimes limiting its potential capacity or authority but just as often having the opposite effect.

By examining how slavery, dispossession, and racism affected specific contexts and institutional sites, we are able to recover the ways in which these left deep and lasting imprints on the structure of US institutions even when they might not otherwise appear as the primary axis of voting or debate.

## Democratization, Authoritarianism, and Racial Violence

Almost immediately after the Constitution's ratification, Congress passed legislation imposing a racial boundary to naturalization, soon followed by a wave of racist state restrictions on Black mobility and voting rights (Bateman 2018). Various states held referenda on whether to re-enfranchise Black male voters (Walton, Puckett, and Deskins 2012), an important goal of the antislavery movement and overlapping networks of Black activists. These efforts would converge with the partisan interests of the Republican party, after a Civil War instigated to preserve slavery (eg., Hall, Huff, and Kuriwaki 2019).

Reconstruction has become a central site for HPE research on race, with the period examined as a case study in democratization and de-democratization, for testing theories of state capacity, party-building, and elite endurance (Poulos 2021). HPE scholarship is especially attuned to the ways in which racist ideologies and practices were reshaped by the shock of emancipation, and how these informed the efforts of different classes to either reconstitute their economic or social position, to take advantage of the new opportunities created by abolition, or to keep from sinking further (eg., Acharya, Blackwell, and Sen 2018; Suryanaryan and White 2021; Du Bois 1935).

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<sup>5</sup> For a non-United States analysis, see Lieberman (2003).

Richard Valelly, in his path-breaking account of the “two reconstructions,” argued that expansion of the right to vote was driven by partisan calculations about how to retain political power, but that its consolidation required the development of legal and political capacity to defend it (2004). The question of state capacity, especially coercive capacity, has loomed large in subsequent accounts. Chacón, Jensen, and Yntiso (2021) have examined the joint effect of Black enfranchisement and state capacity as measured by military base locations. They found that only in occupied counties was enfranchisement correlated with increased tax revenues; and that troop presence was positively correlated with the ability to elect Black candidates. Stewart and Kitchens similarly leverage army locations, finding that counties in which the military was able to protect Black rights and the opportunities of Reconstruction show both greater and more persistent reductions in inequality during Reconstruction, but also more pronounced and enduring violence (2021). The declining presence of the army had spillover consequences for party-building and federal state bureaucracy, including weakening the Freedmen’s Bureau’s capacity “to enforce locally unpopular rules and decisions” despite its early successes and their enduring importance (Lieberman 1994, 422). While greater federal state capacity might have been a prerequisite for durable democratization, subsequent state-building occurred under the control of the white supremacist redemption governments and their successors.

The literature on lynching highlights how racist commitments sustained alternative institutions of coercion and prompted new state-building efforts. Early research debated the causes of its occurrence, including economic and social factors (Beck and Tolnay 1990), as well as more bluntly political uses of lynching (Soule 1992). Recent work has examined the interactive effect of racial segregation on lynching (Cook, Logan, and Parman 2018); extended the analyses to cover targeted killings of Black politicians, which increased with the success of these politicians in producing more downwardly redistributive tax systems (Logan 2020); re-evaluated the political and economic effects of lynching (Jones, Troesken, and Walsh 2017); and has examined the role of lynching in activating and maintaining the racial identities upon which the white supremacist regimes rested (Smång 2016).

Scholars have also connected the occurrence of lynching to debates over state capacity and to states’ efforts to to secure investment. Southern states, supported in some cases by biracial, middle-class coalitions (Johnson 2010), anxious to attract industry, and often subjected to increased media exposure (Weaver 2019), developed new resources and relationships to limit its occurrence (Beck, Tolnay, and Bailey 2016). And yet at the national level southern lawmakers adamantly resisted federal anti-lynching bills, while civil rights organizations pressured Congress and the executive but also the courts (Francis 2014). As Megan Ming Francis highlights, one of the ways in which racism mattered for US state-building was through creating conditions against which racialized communities came to organize in opposition to racist institutions and violence, as well as the limits on problem definition imposed by white funders (Francis 2014, 2019).



Racist state-building could take forms as diverse as limiting lynching laws, strengthening state-controlled forms of coercion, expanding the carceral state (in its postbellum or late-twentieth century variations), or changing the terms under which convicted persons were made to labor (Muller 2018; Mancini 1996). The growth of the incarceration and convict leasing in the South after emancipation was not a reconstitution of slavery, but it was a rapid development of a coercive capacity that could be deployed to secure labor and social control over disproportionately racialized populations. The carceral state in the late twentieth and early twenty-first centuries has equally complex roots, and yet similarly requires an appreciation of the role of racism in sustaining support for highly punitive policies (Beckett and Francis 2020).

Valelly had connected prospects for enfranchisement's durability to the development of party organizations and of jurisprudence. Claims that the United States was a "white man's country" had become the mantra of the Democratic party, reaching a fever pitch during the Civil War and Reconstruction (Kalmoe 2020). Black enfranchisement intensified and complicated this. Boris Heersink and Jeffery Jenkins have shown that Republican party-building in the South continued from Reconstruction to the 1960s, but also that Republican efforts were conditioned by white racism and the extent of Black enfranchisement (2020). White racism limited but did not foreclose biracial coalitions or campaigns in which race was not the determining party cleavage or campaign issue (Jenkins and Peck 2021). But after disenfranchisement, Republican electoral prospects required attracting white voters, which many organizations did by reducing the visible presence of Black Republicans or excluding them outright. Reconstruction jurisprudence-building was similarly constrained.<sup>6</sup>

The political limits to Reconstruction, the changing orientation of the national parties, the rise and suppression of the Populist Party, and the defeat of additional voter protections in 1891, helped produce the context for the imposition of the Jim Crow regimes (Ali 2010; Ottinger and Winkler 2022). V.O. Key Jr. suggested that the disenfranchising constitutions of the turn of the century simply verified a *fait accompli* (1949). While voter suppression was important, the institutions of the 1890s-1910s effectively eradicated Blacks as a class from the electorate (Kousser 1973).<sup>7</sup> Disenfranchisement in turn facilitated the legal imposition of Jim Crow (Roback 1986). Kousser's analysis of disenfranchisement emphasized the central importance of Black Belt Democrats, although the specifics and timing varied with state circumstances: Black Belt Democrats simultaneously feared and relied on Black votes, using a combination of fraud, intimidation, and occasional bargaining to secure for themselves the representational weight of Black populations. White supremacy could be invoked in support and opposition to disenfranchisement, and disenfranchisement's timing depended on local political threats, perceptions of external constraints, and the capacity of southern states to institute effective restrictions (Epperly et al. 2020).

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<sup>6</sup> As with the 20th century civil rights laws (Casco and Washington 2014), Reconstruction-era civil rights legislation very likely had real consequences (Harvey and West 2020; Logue and Blanck 2010; Costa 2010).

<sup>7</sup> See also Keele, Cubbison, and White 2021.

The racist exclusions of the Jim Crow regimes fundamentally limited the quality and character of democratic representation and the outputs of government (see below). Racism's effect on democratic institutions was not least to deprive racially excluded populations the opportunity to elect representatives (eg., Logan 2020) and to exert influence through the electoral connection.

Black Belt planters, however important, nonetheless relied on coalitions with other white interests, including new industrialists and non-elite whites. This shaped the representation of white preferences, the efforts of regime elites to sustain power in the wake of a renewed federal threat and domestic organizing, and states' differing paths toward democracy (Mickey 2015). A central interpretative disagreement concerns the question of whether these regimes are better understood as polyarchies, in which its democratic features were real for whites (Caughey 2018), or as subnational authoritarian regimes, not democratic even for whites however much congruence might be observed between voting and opinion (Mickey 2015).

White supremacy had a presence and consequences well-beyond the governing institutions of the South. The region's post-disenfranchisement representatives were vital actors in the construction of the progressive regulatory state, the "agricultural welfare state," and in the reorganization of US federalism (Johnson 2011, 2007; Bateman, Katznelson, and Lapinski 2018). A voluminous literature examines the ways in which the southern representatives shaped New Deal programs to buttress, or at least not overly threaten, white supremacy and the unequal and low-wage labor regime with which it was entwined (Katznelson 2013; Lieberman 1998; Mazumder 2021; Alston and Ferrie 2007 ).

Collectively these works have explored the ways in which racism shaped the welfare state and, more broadly, the relation between capitalism, labor, and the state that emerged from the New Deal and Fair Deal. The incorporation of occupational exclusions or regional discriminations with clear racial patterns into New Deal programs, along with outright racial segregation or discrimination in some programs (eg. Thurston 2018; Grant 1990; Turner and Bound 2003), have often been interpreted as a condition for the emergence of the welfare state, while reflecting and embedding into the new institutions ideological, psychological, and material commitments that would constrain its future development (Farhang and Katznelson 2005; Chen 2009). Even where the New Deal did address racial discrimination in a more egalitarian direction – as with the Fair Employment Practices Committee of the late war years – its impact was often not felt in the South, where a broad white consensus limited its effectiveness (Collins 2001).

The role of racism in shaping the New Deal, much like its role in shaping the Constitution or earlier moments of state-building, is hardly one-sided or unambivalent. In the short term, the New Deal's contribution to "modernizing" the South and integrating it into a national labor market often exacerbated racist inequalities and may even have helped fortify Jim Crow (Johnson 2010). Over the long-term, however, it may have helped destabilize the political economic foundations of these regimes, while the organizations who would come to define

post-New Deal liberalism threatened its political foundations, through labor organizing, civil rights organizing, and litigation, perhaps most important that which abolished the white primary (Mickey 2015).

## The Effect of Institutions, Policies, and Behavior on Racial Inequality

A second set of research questions concerns the effects of institutions and public policy on racial inequality and outcomes for racial minorities and across racial groups. A substantial descriptive literature has measured historical dynamics in income and wealth holding by race, especially in the US (Higgs 1977, 1982; Hamilton and Darity 2010), including more specifically in terms of real estate capital (Kermani and Wong 2021). Recently, Derenoncourt et al (2021) use historical US Census, state tax, and Survey of Consumer Finances data to systematically measure wealth inequality between Black and white Americans from 1860 to 2020.

A related scholarly debate involves the question of how much of current and historical racial inequality can be explained by institutional and behavioral discrimination, on the one hand, and human capital differences (which themselves can be the result of discrimination, such as via unequal access to schooling, see Margo 1990) on the other (Raphael 2002). Some studies find that a substantial proportion of racial inequality in economic outcomes can be explained by unequal human capital stemming from unequal schooling (e.g., Carruthers and Wanamaker 2017). A large number of other studies, however, suggest that a large proportion of racial inequality remains even when holding human capital constant (e.g., Sundstrom 2007). Correspondingly, many recent studies point to behavioral, policy, and institutional forms of discrimination—some of which arise from historical legacies of discrimination, but others of which persist today—that explain this ‘residual’ inequality.

Research has focused on the economic effects of white supremacist terrorism and policies that disenfranchised Black Americans. Naidu (2012) finds that 19th century Southern “Redemption” disenfranchisement policies had significant negative effects on Black labor income and investment in Black schools that expanded racial inequality. Research has also focused on Jim Crow era racial labor practices and their political-economic effects. Studies examine, for instance, the significance of convict leasing of Black prisoners to the Jim Crow economy (Lichtenstein 1996; Muller 2018).

With data covering 1875 to 1930, Naidu (2010) finds that anti-enticement laws, which imposed criminal penalties on employers who offered higher wages to already employed Black workers, empowered white landowners and reduced the wages of newly emancipated Black sharecroppers. Aneja and Xu (2021) study the effect of the resegregation of the U.S. Federal

Government under President Woodrow Wilson, finding that it increased the racial wage gap due to its reallocation of black civil servants to lower-paid positions.

Turning from the post-Reconstruction and Jim Crow era studies, another body of research investigates the effect of mid-20th century economic policies and institutions on racial outcomes, often finding that the initiation or expansion of New Deal and Great Society economic policies benefited Black Americans' economic standing (notwithstanding the racially exclusionary aspects of the New Deal outlined earlier). Collins (2001) estimates the effect of fair employment laws during the New Deal and World War II on racial inequality and labor market outcomes for Black workers. Derenoncourt and Montialoux (2021) study the effects of expanded minimum wage coverage in the 1966 Fair Labor Standards Act on racial wage inequality. However, Derenoncourt (2022, 370) finds that the Great Migration produced institutional changes that reduced the upward social mobility effects of living in northern cities, finding that “roughly 27 percent of the gap in upward mobility between Black and White families in the urban North can be attributed to changes induced by the Great Migration” (see also Boustan 2016). Jenkins (2021) further argues that racism interacted with municipal bond markets to produce racial inequality in city financing.

Research also looks into the economic impacts of the midcentury civil rights revolution in the U.S. South, often with difference-in-differences and event study designs. Wright (2013) argues that the legal and regulatory ramifications of the Civil Rights Act (CRA) of 1964 and Voting Rights Act (VRA) of 1965 reduced Black poverty and racial inequality. Cascio and Washington (2014) find that the VRA's removal of Jim Crow literacy tests for voting increased the transfer of state funds to localities where Black residents lived. Investigating these mechanisms, Aneja and Avenancio-León (2021) find that the VRA rapidly increased Black wages and reduced racial inequality by opening up new opportunities for public sector employment of Black workers.

In contrast to arguments that highlight education and human capital development (e.g., Smith 1984; Carruthers and Wanamaker 2017), these studies on the effects of (dis)enfranchisement tend to emphasize the role of political power and distributive politics in economic equality, upward mobility, and expanded access to public goods. These findings are also somewhat in contrast with those of Kruse (2013) and other historical analyses that suggest that desegregation and Black in-migration provoked white flight from central cities with negative economic consequences for Black residents (Boustan 2016).

Mass incarceration in the U.S. since the 1970s has also had especially profound political-economic consequences for Black Americans and for racial inequality. Research has focused on mass incarceration's social (Pattillo, Western, and Weiman 2004) and economic effects (Zaw, Hamilton, and Darity 2016). Pettit (2012) shows that high rates of incarceration cause many Black men to “disappear” from national surveys, thereby biasing overall and racial

group estimates of unemployment, health, and other socioeconomic outcomes in ways that overstate racial equality.

Finally, a literature on descriptive representation has investigated the effect of politicians' racial identities, often as a proxy for a racial group's political power, on policy and socioeconomic outcomes. A large number of these studies have focused on the effect of Black mayors during the period of increasing Black mayorships in the post-civil rights period (Eisinger 1982; Saltzstein 1989; Spence, McClerking, and Brown 2009).

## Policies, Institutions, and Racial Formation: Some Future Directions

HPE continues to make significant inroads into our understanding of the effect of race and racism on institutional outcomes, and the effect of institutions on racial disparities. Several challenges remain that can structure future HPE research and put the field into better conversation with other academic disciplines working on these issues, while still leveraging HPE's core strengths. Here, we describe two of these challenges and opportunities: (1) the fluidity of racial categories across multiple dimensions; and (2) the practical challenges associated with collecting historical data on political participation, particularly as it pertains to marginalized minority groups.

### Race and Racial Categories as Variable

If situating race and racism in a scholarly understanding of political economy requires some sort of categorization then taking an explicitly historical approach should draw our attention to the fluidity of racial categories. This fluidity takes multiple forms. As racial categories play a role in statecraft, government agencies regularly shift how they categorize populations in their official statistics. This occurs both in terms of the actual categories that are available, as well as with respect to who is responsible for making decisions about categories (e.g. whether this information is self-reported or decided by a survey enumerator) (Nobles 2000; Thompson 2016; Davenport 2020, Harris et al 1993, Telles 2004). The sources of these changes are varied, emanating at different points from the top-down, bottom-up, and transnationally (for example international communities of statisticians) (Thompson 2016). Individuals have also been found to change their racial self-identification over time or across different contexts (Doyle and Kao 2007; Saperstein and Penner 2012; Laird 2019; for an example outside of the U.S., see Villarreal and Bailey 2020). Finally, and related, in-group and out-group racial boundaries can also change over time, as a vast scholarship examining the historically changing boundaries of whiteness in the United States has shown (Jacobsen 1999).

The fluidity of racial classification can also be seen in the shifting use of (and rationale for using) race in economic behavior and policy making, issues of central concern to HPE. Economic actors and policymakers in their beliefs and actions can help to determine the extent to which race is a relevant factor in their decision making. How race and racial difference come to be constructed, measured, and reported (for example, through redlining maps) can feed back into economic actors' ideas about profit and risk and for policymakers' actions.

For example, the commercial life insurance industry has historically relied on classifying individuals with similar risk profiles, relying on a small handful of classifiers for efficiency. Following the end of Reconstruction, some life insurance companies shifted from using region as a classifier for pricing, to using race. Industry practices, scientific racism, and state level regulatory decisions became deeply intertwined. While some industry statisticians said that the practice was necessary (and thus should not be outlawed, as six states had done by the early 1900s) in order to enable fair pricing and a functioning insurance market, others (as well as some social scientists) questioned whether race should be treated as an immutable characteristic, separate from the historical and social factors that had produced different mortality rates in the historical data used to make economic decisions (Bouk 2015; Wiggins 2020; Muhammad 2019). The practice fell out of favor by mid-century in the insurance industry with the international professional repudiation of scientific racism. Outside of insurance, Freund (2010), Hyman (2011), Thurston (2018), Taylor (2019), and Jenkins (2021) show how contingent racialized beliefs about real estate values were incorporated into public policies and then fed back into white cultural attitudes and behaviors, real estate professionals' practices, and, ultimately, helped to generate large racial disparities in wealth over the course of the twentieth century. In short, racial categories can shift in relevance to ideas about risk, value, and profit over time and across regulatory contexts. As many markets have become ever more algorithmic, the role of race in market outcomes has become more difficult to detect even as many have recovered substantial difficulties at the output level (Benjamin 2019; Fourcade and Healy 2017)

While the challenges associated with the empirical measurement of race and its utility as a "treatment" have long been recognized (see Sen and Wasow 2015), they pose both challenges and opportunities for the field of HPE. The obvious challenge is that scholars cannot assume that racial categories themselves are constant over time, or that they are used for the same purposes by policymakers or economic actors over time. Some scholars have taken this logic farther, arguing that race cannot be studied using positivist methods (Zuberi 2001). Scholars working in or near the HPE tradition have taken an opportunity to engage with these challenges head on by directing their attention to changing classifications as an outcome. Some early work on the intersection of politics, economics, and history explicitly engaged with these issues (Glaeser 2005; Darity, Mason and Stewart 2006; Shayo 2009). Beginning with the premise that racial identity is a social norm rather than being exogenously assigned, Darity, Mason, and Stewart (2006), for example, used evolutionary game theory to model the formation of identity norms and how those might lead to societal-wide racial norms, with implications for material disparities

over time. There has also been more recent engagement with the historical process of racial identity formation and its economic implications (Kranton 2016; Fouka, Mazumder and Tabellini 2020). This builds productively on Omi and Winant's (2014 [1986]) argument that the selection of which human features will signify race "is always and necessarily a social and historical process" (55).

## Agency and Participation from the Margins

A second challenge for HPE scholarship has to do with identifying and measuring historical forms of participation. To be sure, questions about conceptualization and measurement, as well as what to do about limited data availability, are core to the HPE enterprise. The collection and use of new evidence of historical participation is one of the core strengths of the field, as other chapters in this volume show.

These challenges are compounded in historical scholarship that centers the activities and agencies of racial minority groups. While contemporary scholarship has been able to respond to calls to center more marginalized views and activities through the intentional design of surveys and other data collection strategies (Prowse, Weaver, and Meares 2020; Rosenthal 2021; Michener 2019; for a discussion of these calls for centering marginalized voices in political science, see Soss and Weaver 2017; Rogers and Kim 2021; and Michener, SoRelle and Thurston 2022), historical studies are far more limited, especially as one goes farther back into time or into contexts where for various reasons participation may not be documented.

One major limitation has to do with what participants were and were not willing to allow into the record in the first place. For example, recent historical scholarship has uncovered robust Black populist organizing in the Reconstruction era that was distinctive from white populist organizing. Describing some of the activities of Black populism, Ali (2010: 9) writes: "In addition to launching independent and insurgent campaigns against the Democratic Party, Black Populists established farming exchanges, raised money for schools, published newspapers, led boycotts and strikes, and lobbied for political reforms." Yet even with this clear evidence of organizing, establishing exact membership numbers is impossible beyond the estimation that "several hundred thousand" may have participated. As Ali points out, "membership lists were almost never made for fear of reprisal from white authorities should they be discovered" (ibid). Lest this be just a nineteenth century challenge, Thurston (2018, chap. 6) also shows that advocacy groups have intentionally engaged in stealth organization in the twentieth century as well when they perceived their overt presence could undermine their goals or imperil their members' safety. In short, strategic concerns of marginalized actors may shape the availability of data and requires scholars to be careful about their conclusions.

## Conclusion

In this chapter, we have investigated the study of race in HPE research. While the HPE study of race is generally focused on the causes and effects, as well as conceptualization and measurement, of racism and racist practices, our review has plumbed distinct intellectual traditions, including radical political thought, critical history and theory, institutional and labor economics, the new economic history of the 1970s, labor history, the history of capitalism, racial capitalism, and the new institutionalisms in economics, sociology, and political science. We argue that, by contrast, a more narrowly defined HPE as quantitative and game theoretic research from economics and political science gives insufficient attention to structural racism and hierarchy.

We review studies across these traditions that have investigated the questions of how racism shaped political institutions and public policies in the U.S., how institutions and policies created and maintained racial inequality, and the role of politics and political economy in “creating” race and shaping racial categories and identities. In doing so, we hope to contribute to the bridging of the various disciplines, methods, and epistemological traditions engaged in the study of race in HPE.

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