

## ***Ethnicity on the Sleeve and Class in the Heart***

### **When do People Respond to Identity and Material Interests?**

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Are voting rights a class or an ethnic issue? They are both in the diverse societies of the developing world, yet the salience of ethnicity in public discourse frequently compels people to articulate identity demands that may be inconsistent with their material interests, particularly among the rich. This article examines these ideas with an augmented list experiment about illiterate voting rights in Lebanon. Consistent with received wisdom, direct questions yield identity-based answers in which Shiites are more supportive of voting rights than are Sunnis or Christians. Unobtrusive questions, in contrast, yield answers about material deprivation in which poor people are more supportive of illiterate voting than are rich people. The divergence between public statements and private preferences helps to reconcile theoretical predictions that people respond to material incentives with empirical findings that they pursue identity interests.

Although contemporary understandings of democracy require a wide and inclusive franchise, such was not always the case. Nineteenth and early-twentieth century democracies in the making imposed myriad suffrage restrictions based on property, race, gender, residency, education and literacy. When the Western world undertook the long debate over the extension of mass suffrage, most participants viewed the underlying dynamic as a rich-versus-poor class conflict over redistribution, an interpretation that was shared by most academic studies. Although the traditional left-right cleavage is an enduring, well-traveled dimension of social conflict, the present-day developing world is heavily populated by plural societies in which ethnic identities are potent political forces alongside class. In such environments, are voting rights a class or an ethnic issue? Here, I argue that they are both, depending on the context: ethnic in public claims, but class in private preferences.

This article examines the class versus ethnicity debate via the entrée of illiterate voting rights. In material terms, illiteracy strongly correlates with poverty, yet in plural societies it often concentrates in identifiable ethnic groups as well. Studying illiterate voting rights thus provides a discrete window through which to examine a more general set of issues about class versus ethnic conflicts, and motivations based on material interests and identity concerns. Lebanon, a diverse society in which ethnic (sectarian) and class cleavages coexist, serves as the empirical venue for this research, although many other societies could serve in its stead. To be clear, illiterate voting rights are not in themselves politically salient in Lebanon, but this reality is an epistemological virtue rather than a vice. What *is* highly salient is the nebulous but discursively hegemonic and value-charged issue of sectarianism, the real topic of interest, on which this article gains empirical leverage via the relatively tangible and rhetorically pristine vehicle of illiterate voting rights.

Empirically, I use an augmented list experiment to compare the dynamics that drive public statements on and private preferences about illiterate voting rights. Direct questions yield

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sectarian answers that accord with conventional wisdom: Shiites, allegedly the least literate community in Lebanon, are more supportive of illiterate voting than are their Sunni or Christian peers. Unobtrusive questions, in contrast, yield answers about material deprivation: poor people, regardless of sect, are more supportive of illiterate voting than are well-off people. Although public discourse may privilege identity issues, private preferences appear to follow from more prosaic material interests.

This article makes several contributions to the study of both political behaviour and institutional choice in the diverse societies of the developing world. Theoretically, it examines the conditions under which countervailing ethnic and material interests motivate key social groups to adopt one set of positions in public but a different set in private. Methodologically, it disentangles what people say from what they think about voting rights – a substantively important advance, given that much of our prior empirical work has implicitly (but wrongly) assumed that the former is an accurate gauge of the latter. Empirically, it demonstrates that privately held preferences diverge in systematic ways from public discourse. The evidence I present raises questions not only about the degree to which ethnicity drives actual preferences (rather than just discourse about preferences), but also about people's inherent democratic commitments.

The rest of this article proceeds as follows. Section 1 develops theoretical arguments about public versus private support for voting rights, given competing class and ethnic motivations. Section 2 discusses sectarianism and voting rights in Lebanon, the article's empirical venue. Section 3 describes the Lebanese survey data and the augmented list experiment. Section 4 presents the results of the experiment. Section 5 concludes with the article's broader theoretical implications.

#### VOTING RIGHTS, CLASS AND ETHNICITY

Voting is a numbers game, but which numbers matter? In nineteenth-century Europe, the salient figures were headcounts of rich and poor, and the debate over expanding the franchise was, in the words of a contemporary British Conservative, a class struggle 'between property... and mere numbers'.<sup>1</sup> Yet in much of the contemporary developing world, the figures cited refer instead to ethnic demographics, in which the dynamic of 'elections as census, census as elections' exemplifies the ethnic narratives that drive the public discourse of many diverse societies.<sup>2</sup> Lebanon plays one version of the numbers game, as it focuses on the demographic weight of each sect to determine representation in government, and as its confessional communities watch the waxing influence of the country's burgeoning Shia population with disquiet.<sup>3</sup> How do voting rights enter the story in the diverse societies of the developing world? Are they a class issue or an ethnic issue?<sup>4</sup>

#### *Class and Ethnic Conflict Over Who Votes*

Building on a long line of prior work, recent studies on the origins of democracy and the extension of the franchise have modelled a conflict between rich and poor over the distribution of material resources. In such models, the poor prefer high rates of taxation that redistribute wealth from the rich to themselves. Democratization occurs when its net

<sup>1</sup> Acemoglu and Robinson 2006, p 22.

<sup>2</sup> Horowitz 1985, pp 194–6.

<sup>3</sup> Maktabi 1999.

<sup>4</sup> Bratton, Bhavnani and Chen 2012.

costs to the rich are modest, which is most likely to be the case when (a) income inequality falls, which reduces the intensity of redistributive demands; (b) capital is mobile or difficult to tax, which reduces the eventual magnitude of redistribution and (c) costs to repression rise, which reduces the net value of non-democratic governance.<sup>5</sup>

Conceptually, these narratives tell a parsimonious left-right story in which democratization and extending the franchise are contingent outcomes of a *class* struggle between rich and poor over material resources, with income level defining group membership and political interests.<sup>6</sup> Illiteracy, in turn, fits neatly into this class narrative because it strongly correlates with poverty and low endowments of human capital. Denying the vote to illiterates disfranchises an impoverished and marginalized segment of the potential electorate, whereas granting those rights shifts the median voter further to the redistributive left. Hence debates over illiterate voting rights are but one venue within which to wage the struggle between rich and poor.

In this simple left-right story, people's preferences about democracy are materialistic and individualistic: they pursue class interests for personal material gain, and motivations based on normative commitments or group identity concerns fall outside the purview of the model. Social diversity complicates this parsimonious story, however. In many developing world societies, ethnicity offers an alternative to class for defining group membership and thus introduces identity motivations into people's preferences about democracy and extending the franchise.<sup>7</sup> When ethnicity defines a salient social cleavage, illiteracy no longer fits as neatly or unambiguously as it once did into a class-based redistributive narrative. Illiterates may still be concentrated among the poor, but they may also be (and often are) concentrated within a particular ethnic group.

Literacy tests in the Jim Crow South corroborate the criticisms of purely class narratives when ethnicity is salient.<sup>8</sup> In addition to the obvious racial implications, obstructions to voting such as literacy requirements and poll taxes stimulated 'the storms of agrarian radicalism and class resentment' that threatened to divide rich and poor Southern whites, because such obstructions 'could be turned against poor, illiterate whites as well as blacks'.<sup>9</sup> Elites transformed a potential class conflict into a racial one by introducing grandfather clauses and numerous other mechanisms that provided whites with a permanent loophole to suffrage requirements that would have effectively disfranchised them on class grounds. That poor whites should acquiesce to this outcome, much less support it enthusiastically, is difficult to explain in material terms, as they might alternately have secured greater material benefits by allying with blacks in a redistributive coalition against rich whites.

Jim Crow illustrates that ethnicity makes it harder to tell a purely material story. Still, many political economy-oriented studies emphasize the distributional dimension of ethnic competition.<sup>10</sup> In such studies, ethnicity is instrumental and valued as a means of enhancing material welfare rather than valued for its own sake. In contrast, a large body of work that draws on insights from social psychology suggests that identity motivations provide greater explanatory leverage for ethnocentric behaviour than does a purely distributive narrative.<sup>11</sup>

<sup>5</sup> Acemoglu and Robinson 2000, 2006; Boix 2001, 2003; Robinson 2006.

<sup>6</sup> Boix 2003, p 53.

<sup>7</sup> Chandra 2004, 2006; Horowitz 1985; Huddy 2001, 2003; Wilkinson 2005; Varshney 2003, 2007.

<sup>8</sup> Key 1949; Matthews and Prothro 1963.

<sup>9</sup> Schmidt 1982, p 842.

<sup>10</sup> Alesina, Baqir and Easterly 1999; Bates 1974, 1983; Collier 1999; Easterly and Levine 1997.

<sup>11</sup> Horowitz 1985; Huddy 2001, 2003; Monroe, Hankin and Van Vechten 2000; Tajfel 1982.

TABLE 1 *Welfare Effects of Illiterate Voting Rights Along Material (M) and Identity (I) Dimensions*

		Identity	
		Rich	Poor
Material	Rich	Reduce (M <sup>-</sup> , I <sup>-</sup> )	Trade-off (M <sup>-</sup> , I <sup>+</sup> )
	Poor	Trade-off (M <sup>+</sup> , I <sup>-</sup> )	Enhance (M <sup>+</sup> , I <sup>+</sup> )

Here, ethnic competition focuses not so much on material goods as on identity goods such as dignity, self-respect and recognition.<sup>12</sup> Still other studies synthesize these approaches by acknowledging that people pursue both material and identity interests simultaneously.<sup>13</sup>

### *Material-Identity Trade-offs and Free-Rider Problems*

In a compound story that more effectively accommodates the multiple motives to which people in diverse societies respond, individuals vary in their endowments along both material and identity dimensions. Hence, in addition to being rich or poor, people also belong to higher- or lower-status groups. The two dimensions may correlate, but ethnic groups typically represent parallel small-scale societies that are socio-economically diverse. Between-group differences in average material welfare contribute to collective status rankings, but the wide within-group variance around those averages implies considerable overlap in material conditions between the groups.<sup>14</sup>

Table 1 abstracts to ideal-type combinations of endowments according to variation in personal material wealth and membership in high- and low-status groups. Illiterate voting rights influence welfare on both dimensions by redistributing wealth and altering relative group status. Such rights yield unambiguous outcomes for some endowment combinations. For wealthy, high-status types, illiterate voting reduces welfare on both dimensions; conversely, it enhances welfare on both dimensions for poor, low-status types. Other combinations, however, must trade off gains on one dimension against losses on the other. For material-rich but identity-poor people, illiterate voting redistributes their wealth but augments their social identity. Material-poor but identity-rich people, meanwhile, benefit from redistributive taxation but suffer losses in relative social status when members of a 'lesser' community acquire the same rights and privileges as their own community.

There is an important asymmetry in the trade-off between material and identity goods, however. In particular, the rich pay the material costs of illiterate voting privately through redistributive taxes, while both rich and poor members of the group consume the identity benefits of dignity and recognition collectively. Social identity is a club good that is non-rival

<sup>12</sup> Varshney 2003, 2007.

<sup>13</sup> Akerlof and Kranton 2000; Bratton, Bhavnani and Chen 2012; Calvert 2002; Chandra 2004, 2006.

<sup>14</sup> Following Horowitz (1985, pp 22–36), scholars frequently characterize plural societies as ranked or unranked based on the coincidence of ethnic group membership with social class. Although stylized caste systems provide an ideal type for ranked systems, unranked or mildly ranked systems are much more common empirically. In the latter cases, ascriptive-like membership criteria make such groups 'societies in miniature', with members at all stages of the life cycle performing a full range of economic functions and advancing their own elites and leaders (Bates 1974; Chandra 2004; Horowitz 1985; Melson and Wolpe 1970). Ethnic rankings tell us only about differences in group means; the wide variances we typically observe around those means produce overlap in the group distributions on the material dimension. See also Roccas and Brewer (2002) on social identity complexity when multiple group identities overlap and diverge.

and non-excludable for all group members. These properties subject identity goods to the classic free-rider problem: all members benefit from higher social status, but each prefers to let others provide the collectively consumed good. Further compounding the problem is the fact that only the rich pay the material costs of provision. In effect, poor members of the lower-status group demand that their rich coethnics subsidize the increase in group status that comes with illiterate enfranchisement by obligating the latter to bear the costs of the increased redistribution that also accompanies those rights.

Analogously, illiterate voting implies an identity cost to the higher-status group via the diminution of relative status. Because social identity is non-rival and non-excludable, however, this identity cost is a collectively borne public bad distributed across rich and poor members alike. Compared to the diffuse group status losses, meanwhile, the material gains from redistribution concentrate among the poor. Opposing illiterate voting rights requires poor members of the higher-status group to forgo privately beneficial material redistribution to sustain the supply of a collectively consumed identity good. In effect, the rich implicitly demand that their poor coethnics accept a material-identity trade-off that they (the rich) do not have to make themselves. Although ethnicity can express class conflict in strongly ranked systems, it acts here as a *barrier* to class conflict by checking the demand for the redistribution of material resources.<sup>15</sup>

### *Social Pressure and Preference Falsification*

All else being equal, then, we might expect people to privilege private material interests over social identity outcomes that are vulnerable to free-riding. Nonetheless, empirical evidence suggests that people often articulate identity demands, sometimes even when they conflict with personal material interests.<sup>16</sup> Crucially, however, exercising voice is a *public* act rather than a private one. Consequently, it leaves people vulnerable to what Tocqueville and Mill identified as the tyranny of friends and neighbours: the pressure to adopt socially desirable public positions. When ethnic identities are politically salient, they significantly raise the cost of openly exercising the ‘selfish’ exit option to ‘abandon’ one’s coethnics. Put more strongly, ‘exit has often been branded as *criminal* and denounced as ‘desertion, defection, and treason’.<sup>17</sup>

Social pressure helps to mitigate the free-rider problem in the provision of identity goods by bestowing selective incentives (praise, honours) on people who advance the group’s collective welfare and imposing selective disincentives (ridicule, ostracization) on those who defect. Yet such pressure only partially resolves the problem, because it influences public claims without changing private preferences. In Kuran’s terms, social desirability affects people’s reputational utility without altering the intrinsic utility they derive from the positions they publicly espouse. Individual efforts to bolster reputational utility, in turn, snowball into a ‘spiral of prudence’ that delinks society’s observed distribution of *public* opinion from its latent distribution of *private* opinion.<sup>18</sup>

<sup>15</sup> Horowitz 1985.

<sup>16</sup> Horowitz 1985; Huddy 2003; Monroe, Hankin and Van Vechten 2000; Varshney 2003.

<sup>17</sup> Hirschman 1970, p 17, emphasis in original.

<sup>18</sup> Because individuals make only negligible contributions to society’s aggregate distribution of intrinsic preferences, they can treat society’s choice as fixed when deciding which views to articulate publicly. Sensitivity, in turn, induces people with socially undesirable intrinsic preferences to trade off reputational gains from saying the ‘right’ thing against losses in expressive utility from lying (Kuran 1995). Note that identity enforcement via social pressure is itself subject to a free-rider problem because individual people

Social desirability pressures people with unpopular beliefs to falsify their preferences by making public claims that differ from their private views.<sup>19</sup> As the pressure grows more powerful, people increasingly guard what Scott calls their ‘hidden transcripts’ behind ritualistic public ones – and ‘the more menacing the power, the thicker the mask’.<sup>20</sup> We usually imagine that preference falsification concentrates among the weak and dispossessed, such as Havel’s celebrated greengrocer of Communist Europe who displays a poster bearing the slogan ‘workers of the world unite!’ out of prudence rather than conviction, ‘simply because it has been done that way for years, because everyone does it, and because that is the way it has to be’.<sup>21</sup> The weak are not, however, uniquely sensitive to social desirability pressures, which constrain people across the spectra of wealth and social status.

Preference falsification warps the distribution of public (but not private) opinion about illiterate voting due to the sometimes-consistent, sometimes-countervailing normative hegemonies of democracy and ethnicity. Of Table 1’s ideal types, only poor, low-status people avoid social pressure to dissimulate, because widely hallowed norms of democratic inclusion and ethnic solidarity buttress their material- and identity-based interests in illiterate voting rights. These maxims conflict for high-status types, however: democratic mores check rich members’ inclinations to oppose illiterate voting openly, while expectations of ethnic loyalty limit their poor counterparts’ willingness to advocate in favour of such rights. Finally, rich members of low-status groups must navigate a double whammy of social desirability pressures: norms of democratic inclusiveness and ethnic solidarity both oblige them to express public preferences that are at odds with their material interests.

### *Hypotheses*

What, then, can we say about illiterate voting rights in plural societies: are they a class issue or an ethnic issue? We can answer this question with two plausible rival hypotheses one based on identity interests, and the other on materialism. All else being equal:

HYPOTHESIS 1 (Identity): *Members of lower-status groups are more likely to support illiterate voting rights than are members of higher-status groups.*

HYPOTHESIS 2 (Materialism): *Poor people are more likely to support illiterate voting rights than are rich people.*

These two hypotheses reflect the reality that people pursue both identity and material interests concurrently. All else being equal, however, free-rider problems should discourage people from pursuing collectively consumed identity goods. Social pressure for ethnic solidarity, meanwhile, should penalize free-riders and those who ‘abandon’

*(Fnote continued)*

must bear the costs to of applying pressure. Some of these costs are trivial (raised eyebrows, disapproving glances) but produce strong effects in the aggregate. Activists with intense intrinsic preferences and great expressive needs – that is, those with an encompassing interest in supplying the social identity good – engage in more costly actions such as ostracizing, directing boycotts, orchestrating public smear campaigns, or meting out physical punishment. Compare Hardin 1995; Kuran 1995; Olson 1965.

<sup>19</sup> Kuran 1995.

<sup>20</sup> Scott 1990, p 3.

<sup>21</sup> Havel 1978.

their group for selfish pursuits, while rewarding partisans and team players who advance the group's collective welfare. We are thus left with a conundrum: free-rider problems hamper identity interests, while social desirability discourages material pursuits.

These two hypotheses make qualitatively different predictions about how preferences vary. To resolve the conundrum, however, we must distinguish between *public* and *private* preferences.<sup>22</sup> Both hypotheses should be correct, but each should successfully predict a different kind of answer: identity in public but material in private. People can contribute, or at least appear to contribute, to a collective identity good via discourse. As long as their public statements are not verifiable and their private preferences are not observable, they can avoid group sanctions by voicing support for identity interests in public while pursuing material interests in private.

#### SECTARIANISM AND VOTING RIGHTS IN LEBANON

Lebanon's sectarian communities were strongly ranked at the time of independence in 1943,<sup>23</sup> but these rankings obscured considerable within-sect heterogeneity and have grown milder over time. On average, Christians enjoyed higher levels of education and held higher-status and better-paying jobs than did their peers in the Muslim communities. Sunnis followed in the ranking, and then finally the Shia community, the members of which were mostly uneducated and systematically held low-status, low-paying jobs. Over the subsequent decades, however, the Muslim communities' rising educational attainment and living standards have narrowed the gap with their Christian counterparts. We can observe the effects of this considerable, albeit imperfect, levelling in the country's illiteracy rates and measures of material well-being.

Despite a long-standing reputation for educational attainment, Lebanon's illiteracy rate currently hovers at 10–19 per cent.<sup>24</sup> Historically, illiteracy rates were highest in the rural areas and among women, and lower among Christians. Generational changes sharply reduced these disparities, however. Data from the early 1960s show that the yawning Christian-Muslim gap among rural adults largely disappeared among youths (Table 2).<sup>25</sup> Demographic inertia means that these generational differences persist in the form of lower illiteracy rates in Lebanon's Christian regions compared to its Muslim areas, although even in the former the rates vary significantly from district to district.<sup>26</sup>

<sup>22</sup> Kuran 1995.

<sup>23</sup> Gaspard 2004; Horowitz 1985; Hudson 1968.

<sup>24</sup> The adult illiteracy rate is 10 per cent, according to a 2007 estimate from the World Bank's World Development Indicators and 12.6 according to the CIA *World Factbook*. One UNDP estimate from the late 1990s puts the rate at 13.6 per cent while another estimates it at 11.1 per cent plus 7.9 per cent with education below the pre-school level (19 per cent of the population reads below the pre-school level). See <http://www.undp.org.lb/programme/pro-poor/poverty/povertyinlebanon/molc/livingcondition/E/Kadas.htm> and <http://www.undp.org.lb/programme/pro-poor/poverty/povertyinlebanon/molc/education/B/components.htm>. Compare Laithy, Abu-Isma and Hamdan 2008.

<sup>25</sup> A 1996 Ministry of Social Affairs household living conditions survey reveals that illiteracy and the gender gap are increasingly phenomena of earlier generations. For Lebanese 45 and older, illiteracy rates were 22.1 per cent among men and 46.0 per cent among women ( $\chi^2 = 11.68, p < 0.01$ ). Among those in the secondary school (15–19) age bracket, illiteracy rates were 3.6 per cent for both sexes. <http://www.undp.org.lb/programme/governance/advocacy/nhdr/nhdr97/chpt3f.pdf>, accessed 25 March 2011. Similarly, the World Bank's 2007 estimate of the youth illiteracy rate is just 1 per cent.

<sup>26</sup> Based on the 1996 Ministry of Social Affairs data, illiteracy rates in half of Lebanon's eight Christian-dominant districts/*cazas* (at least 75 per cent Christian) were below the national average of 13.6 per cent and above it in the other half. Among these districts, Kesrouan and Bcharre had the lowest

TABLE 2 *Rural Illiteracy Rates, Early 1960s*<sup>27</sup>

	Men	Women	Average		Boys	Girls	Average
Christian	23	45	34	Christian	22	29	25.5
Muslim	39	69	54	Muslim	28	33	30.5
Difference	16*	24*	20*	Difference	06	04	05
$\chi_1^2$	4.13	5.05	4.55	$\chi_1^2$	0.72	0.26	0.45
<i>p</i>	0.04	0.02	0.03	<i>p</i>	0.40	0.61	0.50

\**p* < 0.05

In the aggregate, Lebanon suffers from high income inequality; while over one-quarter of the population falls below the poverty line, the country's billionaires are worth just under one-quarter of Lebanon's annual gross domestic product (GDP).<sup>28</sup> Notwithstanding stereotypes to the contrary, this inequality does not follow from the dramatic between-community differences of an earlier era. Figure 1 summarizes several indicators of socio-economic status by sect from this project's survey data (details to follow). These data reveal that, in objective terms, today's community rankings are objectively much milder than those of the past.

Figures 1a and 1b show that Christians remain somewhat better educated than their Sunni and Shia peers and enjoy somewhat higher incomes, although the differences are not stark. These data also suggest that the Shia community has closed the gap with its Sunni counterparts. On average, Shiites actually appear to be slightly better educated and slightly wealthier than Sunnis, although we must be circumspect about this observation due to the high sample non-response rate on the income question (about 10 per cent). As an alternative measure of material well-being, Figure 1c reports the average number of hours per day in which the electricity is off in respondents' homes. These data conform with the conventional wisdom that the Shia community, on average, does indeed face greater material deprivation than do Sunnis or Christians, although the community average is inflated by a subset of Shiites that never has electricity. Overall, Figure 1 reveals significant socio-economic heterogeneity in each of the communities, as well as considerable overlap between them – each sect's median response falls within the interquartile range of each of the others.

(*Note continued*)

and highest rates at 7.8 and 15.7 per cent, respectively. By way of comparison, the worst-off Sunni- and Shia-dominant districts were Minieh and Marjayoun at 24.8 and 23.6 per cent, respectively; Akkar, the least-literate district in the country at 30.5 per cent, is over one-third Christian. We should treat these data as suggestive rather than definitive, however, because of ecological inference problems. For district-level illiteracy rates, see <http://www.undp.org.lb/programme/pro-poor/poverty/povertyinlebanon/molc/livingcondition/E/Kadas.htm>, accessed 25 March 2011.

<sup>27</sup> Adapted from Hudson 1968, p 78.

<sup>28</sup> Makdissi and Marktanner (2009, p 10) cite Lebanon's Gini coefficient at 0.56, which is nearly two standard deviations above the global mean ( $\hat{\mu}=.41, \hat{\sigma}=.09$ ) and a full standard deviation above the average in Latin America ( $\hat{\mu}=.51, \hat{\sigma}=.05$ ), a region notorious for its high inequality. Global figures were taken from the 2009 UNDP Human Development Report, available at <http://hdrstats.undp.org/en/indicators/161.html>, accessed 14 July 2010. The UNDP's Lebanon office reports that some 28.5 per cent of the population falls below the poverty line (about \$4 a day per person) and 8.0 per cent are considered extremely poor. Meanwhile, the combined net worth of Lebanon's six billionaires amounts to \$13 billion, or 22 per cent of GDP (Moukheiber 2011).



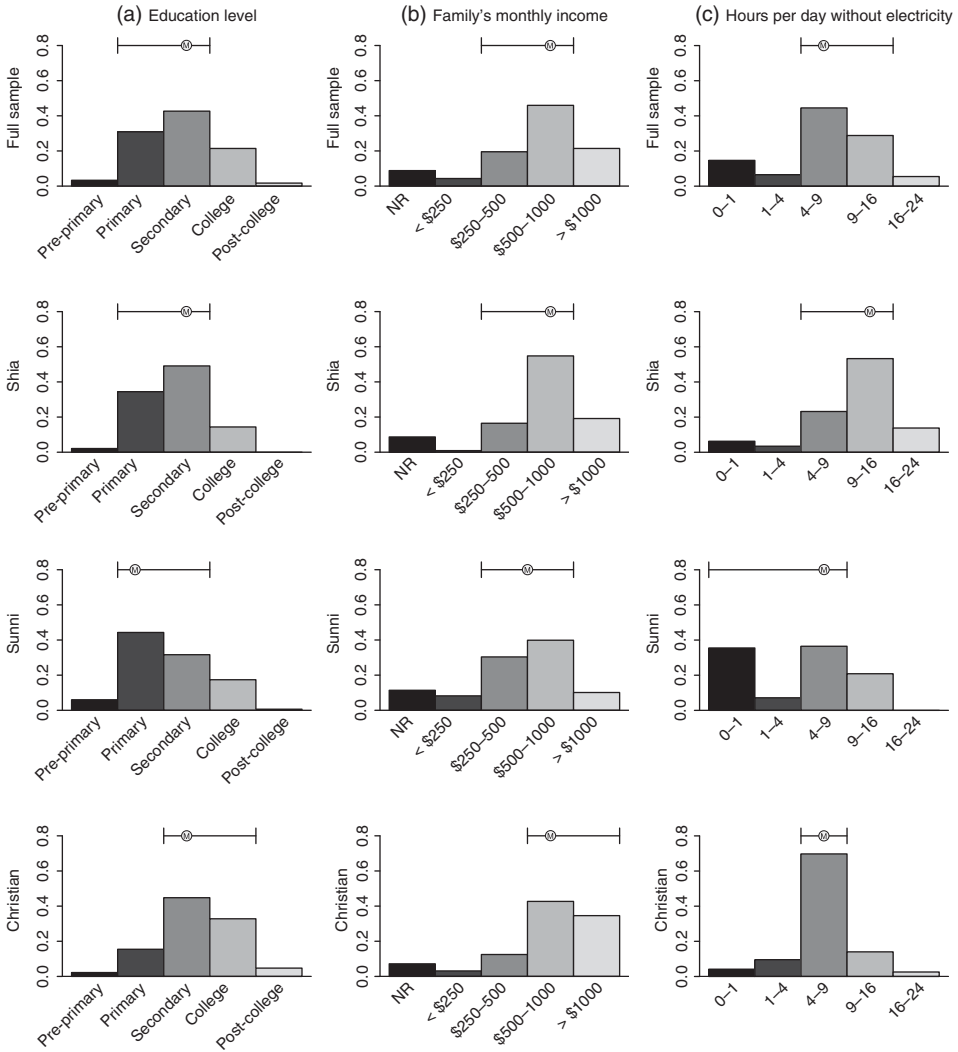


Fig. 1. Socio-economic status indicators with medians and interquartile ranges (author's survey data)

Nonetheless, status differences persist based on residual stereotypes of Christian advancement and (especially) Shia backwardness.<sup>29</sup> Although 'poverty and illiteracy were the norm' among the Shia at independence, the community experienced a 'renaissance in education' starting in the 1950s that produced a new middle class and an educated elite.<sup>30</sup>

<sup>29</sup> 'Backwardness' has stronger pejorative connotations in Arabic than it does in English; the term covers an all-encompassing range of social problems that includes illiteracy, petty crime, ignorance about hygiene, men abandoning their wives and children, and so on (Deeb 2006, p 183).

<sup>30</sup> The first quoted passage is from Deeb (2006, p 73); the second is from Shams al-Din (2002, p 34), one of the leading figures of the renaissance. See similar claims by Sadr (2000, pp 55, 148-149), who spearheaded the mobilization of the Shia community out of their marginalization. For additional

The community subsequently developed to the point where Shiites were no longer ‘as economically disadvantaged as the discourse about “disinheritance” and the stereotypes of the past made them out to be’. Yet the stereotypes persist; one civil society leader explained that ‘for a long time, the Sunnis looked down on them [the Shia], and they were looked on as the poor, illiterate ones by the Christians, even up to the 1990s’.<sup>31</sup>

Despite sharing identity interests with their poorer co-sectarians, many of the emerging class of wealthier, better-educated Shiites initially avoided Lebanon’s sectarian political movements and ‘sought out a modern life, and attempted to exit from deprivation, *not on the basis of Shiism, but on the basis of modernity*’.<sup>32</sup> Sectarian discourse is hegemonic in the Lebanese public sphere, however; it penalizes the exit option by stigmatizing those who ‘desert’ their sect and subjects them to social sanctions. To emphasize this hegemony, a venerated Shia cleric observes that:<sup>33</sup>

The sectarian system is the reason why the Lebanese don’t feel their nationality. There are no Lebanese in Lebanon, there are Maronites working on behalf of Maronites, Orthodox on behalf of Orthodox, Druze, Sunni, Shia, and so on ... [everything] comes back to a struggle on a sectarian basis.

Notwithstanding occasional rhetorical flourishes to the contrary, all but a few marginal parties are single-sect catch-alls that aggregate co-sectarians who otherwise differ substantially on non-identity dimensions – such as rich and poor on the classic right-left scale of economic redistribution. Sectarianism’s centrality in public life enforces people’s publicly professed loyalties to their sect, even as individuals use exit and passing strategies in the private sphere.<sup>34</sup> One businessman illustrated the black humour surrounding passing strategies with this anecdote:<sup>35</sup>

One of my Shiite friends here came into the office one day wearing more traditional clothes and we joked ‘you look like Shiite’ (shit), and he laughed his ass off. Another Shiite friend came in dressed sharply in a suit, and joked that he was ‘camouflaged as a Christian’. Personal relationships between members of the sects are good. The political relationships are not like that.

The public veneer of ‘sectarian solidarity’ may consequently mask considerable ambivalence, especially among people for whom solidarity brings costs as well as benefits. ‘Well-heeled, educated’ Shiites, for example, frequently express dismissive attitudes toward their poorer,

*(Fnote continued)*

background on the Lebanese Shia, see, among numerous others, Ajami 1986; Chalabi 2006; Fadlallah 1997; Gharib 2001; Madini 1999; Norton 1987; Weiss 2010.

<sup>31</sup> The former quoted passage is Ajami’s (1986, p 189); the latter comes from an interview with a leading anti-sectarianism activist in *05AMAM* ([www.05amam.org](http://www.05amam.org)), Beirut, July 2008.

<sup>32</sup> Quoting the former vice president of the Supreme Shia Council (Shams al-Din 2002, p 35, emphasis added). The Shia political movement that emerged in the 1960s (today’s Amal) combined two very different constituencies: a small emerging middle class and a large mass of urban and rural poor. Precise statistics on membership composition are unavailable, but one scholar concludes that the majority of members were illiterate (Gharib 2001, p 223). A mean-spirited joke holds that the interior pages of the Amal party newspaper are blank because members (Shiites) cannot read.

<sup>33</sup> Fadlallah (2001, p 238).

<sup>34</sup> See Ghalioun 1990; Khashan 1992; Makdisi 2000; and Ofeish 1999 on Lebanese sectarianism generally, Corstange 2012a on Lebanese sectarian discourse and Hoss 2003; Muhsin 2000 and Sulayman 1998 on sectarian bidding wars between the parties. See el Khazen 2000, 2002 and Hashishu 1998 on the organization of most political parties (and all the big ones) as primarily single-sect entities.

<sup>35</sup> Interview, businessman, Beirut, July 2008.

'backward' co-sectarians in private settings, in which they embrace 'traditional urbane Lebanese formulas and prejudices with even more ... fervor than their Christian compatriots'.<sup>36</sup> More generally, the heavy public valorization of group unity enables elites to cater to their constituents with symbolic identity goods, in place of the material benefits that many would otherwise demand.<sup>37</sup> 'Symbolic power is of value to the man in the street', one think-tank director observed, but 'what are constituents getting out of the deal? Not much'.<sup>38</sup> Rather than the unified monoliths that public discourse makes them out to be, Lebanon's sectarian communities are internally heterogeneous in both socio-economic status and policy preferences. Nonetheless, social pressure for 'sectarian solidarity' deters dissenting voices from articulating their views publicly.<sup>39</sup>

Putting the above together, the identity hypothesis (H<sub>1</sub>) predicts that Shiites, as members of the lower-status group within which illiteracy stereotypically concentrates, are more likely to support illiterate voting than are their Christian or Sunni counterparts. The materialism hypothesis (H<sub>2</sub>), by contrast, predicts that poor people, regardless of sect, are more likely than their wealthier peers to support voting rights for illiterates. Both hypotheses should be correct, but the former should explain variation *in what people say* while the latter should explain variation *in what people think*. Therefore identity interests should better explain public support, and material interests private support, for illiterate voting rights.

#### DATA AND METHODS

How, though, can we disentangle people's public support from their private support for sensitive issues? A large body of research on American racial politics, for example, emphasizes the importance of distinguishing what people *claim* from what they *believe*, because not everyone who says they share socially desirable views actually does so.<sup>40</sup> More evocatively, Scott observes that people tailor their performances for specific audiences and 'sing one tune' when among their own but a very different one in mixed company.<sup>41</sup> Such theatrics, however, make it difficult to determine which of the tunes (if either) reflects people's privately held preferences, because 'we cannot know how contrived or imposed the performance is unless we can speak, as it were, to the performer offstage'.<sup>42</sup>

<sup>36</sup> The quote is from Chalabi (2006, pp 1–2, 5). Deeb (2006, pp 43, 45, 182–3) reports similar reactions from wealthy Shiites, and even from volunteers at a Shia charity organization she studied, where resigned sighs of 'oh, what is this backwardness' reflected workers' tendencies to view poor Shiites as representative of how their community's members are not 'as modern' as other Lebanese.

<sup>37</sup> Chandra 2004; Kasara 2007.

<sup>38</sup> Interview, Beirut, July 2008.

<sup>39</sup> Although social desirability touches all Lebanese, regardless of sect, the Shia community in particular faces an additional form of pressure: Hizballah's weapons and security services. Deeb (2006, p 11 fn. 23) observes that many Shiites do not support the party but live in Hizballah-dominated areas 'quietly, without registering their dissent, whether because of social pressures or the institutional hegemony of the party in their neighborhoods'. The director of a well-respected Beirut think tank estimates that 15–20 per cent of Shiites fall into this silent opposition of 'secular forces and the middle class who think this is bullshit'. A Lebanese publisher, citing his own polling data, puts the figure closer to 40 per cent, primarily composed of 'middle class, educated bourgeoisie' and some of the traditional families. Interviews, Beirut, June and July 2008.

<sup>40</sup> Berinsky 1999, 2004; Brehm 1993; Kuklinski et al. 1997.

<sup>41</sup> Scott 1990 pp ix, 4.

<sup>42</sup> Scott 1990 pp ix, 4.

Voting rights are sensitive, and democracy's normative hegemony pressures people to give the 'right' answer: unqualified support. Sectarianism, meanwhile, is both pervasive and sensitive in Lebanon. A former prime minister quipped that, 'I have never in my life seen a sectarian person who acknowledges that he is sectarian, just as I have never seen a liar who admits to lying'.<sup>43</sup> A secular activist, in turn, observed that sectarianism's public and hidden transcripts diverge, and 'that which [you] secretly conceal, [you] openly and clearly express its opposite'.<sup>44</sup> Under such circumstances, it is crucial to use unobtrusive data collection techniques that can help neutralize the incentives for survey respondents to misrepresent themselves.

Response bias frequently riddles the answers to sensitive questions; unchecked, it can seriously damage the inferences we try to draw from survey data. The list experiment has considerable potential to nullify respondents' incentives to misrepresent themselves to interviewers.<sup>45</sup> In the augmented implementation, the sample is split into two groups. Control respondents hear a list of non-sensitive, yes/no questions that they answer individually. Treatment group respondents, meanwhile, hear the same list plus one sensitive item of interest; they tell the interviewer *how many* of the items they do/believe, and specifically *not* which ones. Respondent anonymity is thus transparent: no one, not even the interviewer or subsequent data analysts, can know whether or not a treatment respondent included or excluded the sensitive item in his or her answer. Yet by utilizing the information from the control group's responses to the non-sensitive items, we can extract the information we desire – mechanically, coefficient estimates – about the sensitive item from the treatment group. Put together, the list experiment approaches Scott's 'privileged peek backstage'.<sup>46</sup>

In this analysis, I used an augmented list experiment procedure to examine Lebanese attitudes toward voting rights for illiterate people.<sup>47</sup> The data come from an original mass attitude survey conducted in Lebanon in the fall of 2005, which chronologically fell roughly between the pull-out of the Syrian armed forces in the spring of 2005 and the summer 2006 Israel-Hizballah war. Beirut-based MADMA Co. administered the face-to-face surveys of 1,000 respondents drawn from a stratified sample of Lebanese adults across all provinces and religious communities.<sup>48</sup>

<sup>43</sup> Hoss 2003, p 103.

<sup>44</sup> Sayegh 2007, p 28.

<sup>45</sup> Corstange 2009; Streb et al. 2008; Kuklinski et al. 1997.

<sup>46</sup> Scott 1990, p 4.

<sup>47</sup> See Corstange 2009 for details on the estimation procedure; a non-technical summary is as follows. Respondents were first assigned randomly to either an 'unobtrusive' or 'direct' group. The former received a list of items they do/believe and answered with a count; the latter received the same list, but answered each item individually. We used the direct group's responses to get consistent estimates of the population's propensity to answer 'yes' to each of the *non-sensitive* items. We are, of course, ultimately interested in the population's propensity to answer 'yes' to the *sensitive* item. Algebraically, we can back this quantity out of the unobtrusive group's count responses by using the estimates we obtained from the direct group. The count on a four-item list implicitly contains four quantities: three non-sensitive item propensities and one sensitive item propensity. The direct group gives us estimates of the three non-sensitive quantities, allowing us to extract the one sensitive propensity from the count.

<sup>48</sup> MADMA's sample frame is based on household demographic surveys conducted by the Lebanese government in the late 1990s on tens of thousands of households, which provides the most reliable sample frame available, given the absence of official census data due to political sensitivity. The overall response rate was 70 per cent, which did not vary significantly between religious communities. Due to their small subsample sizes, I excluded Druze and Alawi respondents from the analysis.

I conducted the survey during a period of important political transformations in Lebanon, which made debates over institutions and electoral procedures particularly salient. Although the primary points of contention were over district size and plurality versus proportional voting, a subthread of the debate was a discussion of who should be allowed to vote at all, with a specific focus on the right to vote for youths and expatriates. In 2006 Lebanon's National Commission on the Electoral Law endorsed voting rights for both of these segments of the population, which represent two key planks in a civil society-led campaign for electoral reform.<sup>49</sup> Differences of opinion exist on whether or not to grant voting rights to these groups but, as one Lebanese analyst stated, they are discussed all the time and are 'not sensitive at all'.<sup>50</sup>

I took advantage of this ongoing debate by embedding a question about illiterate voting in a broader set of questions on voting rights in Lebanon. All respondents were given the following prompt:

There has been some debate recently over who should have the right to vote in Lebanese elections. I'll read you some different groups of people: please tell me if they should be allowed to vote or not.

Respondents were then given the following list of options:

1. Young people between the ages of 18 to 21
2. Lebanese expatriates living abroad
3. Illiterate people
4. Palestinians without Lebanese citizenship

The sample was split randomly into control and treatment groups on a 1:3 ratio. Control group respondents were asked to indicate, one at a time, which groups should have the right to vote. Treatment group respondents were also given the following prompt before answering:

I'm going to read you the whole list, and then I want you to tell me *how many* of the different groups you think should be allowed to vote. *Don't tell me which ones*, just tell me how many.

The first and second list items, youths and expatriates, capture part of the public debate over voting in Lebanon. As described above, these are elements of Lebanese public discourse that individuals are willing to discuss openly. Further, their inclusion on the list helps to focus respondent attention on the debate over voting rights, which reduces the novelty – and, plausibly, the obtrusiveness – of the sensitive third item on illiterate people. I designed the fourth list item to evoke *nos* from essentially everyone by providing respondents with a

<sup>49</sup> Interview with NCEL member, Beirut, June 2008; YaLibnan 2008. See also Salem 2005; Lebanese Transparency Association, the Lebanese Center for Policy Studies and the Lebanese Association for Democratic Elections 2007; Lebanese Association for Democratic Elections 2006a, 2006b. Note that lowering the voting age to 18 requires a constitutional amendment (cf. constitutional clause 21), which the parliament has passed, but it must now be ratified. Nothing in the constitution forbids expatriates from voting in principle, although the government makes no facilities available for doing so. As Lebanese Association for Democratic Elections officials feared, the cabinet sacrificed youth and expatriate voting for the 2009 elections in order to reach a compromise on the electoral law. Interviews, July 2008. Numerous additional aspects of the electoral system, including the use of sectarian quotas in parliament and where people may register to vote, vary in their salience within the general electorate. The point of the survey question was not to gauge which electoral provisions respondents consider the most urgent to reform – the quotas, district size or use of proportional representation would likely be the three most-cited components. Instead, the question aims to provide a vehicle to examine the 'identity versus materialism' question without the rhetorical baggage of the more commonly discussed aspects of the electoral system.

<sup>50</sup> Interview, Beirut, July 2008.

category of people (Palestinians *without Lebanese citizenship*) that may legitimately be excluded from voting. This item helps to meet an administrative need for a successful list experiment: minimizing the likelihood that respondents will answer *yes* (or *no*) to all of the list items, which in effect strips them of their anonymity.

The outcome of interest is support for illiterate voting rights, which provides an empirical entrée into the theoretical question of whether material or identity interests drive preferences. As noted previously, voting rights for illiterates are not a central fixture of public debate in Lebanon. For testing purposes, however, the non-centrality of this issue is an empirical virtue rather than a vice. Although sectarian dynamics underlie attitudes toward voting rights, illiterate voting has not yet been heavily contaminated by sectarian rhetoric. Conceptually, illiterate voting rights provide one operationalization of a set of issues in which we might expect both material and identity interests to influence preferences. Fortunately, respondents have not been primed by incessant public discourse to think about illiterate voting as an unambiguous sectarian issue – which, if they had, would stack the deck heavily in favour of a top-of-the-head, identity-based sectarian answer.<sup>51</sup>

## FINDINGS

After parsing out what people are willing to state about illiterate voting rights from what they actually think, a stark finding emerges: identity-based motives, and not material motives, drive support in public statements, whereas the reverse holds in private. I estimate two empirical models. The ‘direct’ version uses logistic regression to estimate a model of control group responses to the direct question of whether or not illiterate people should have the right to vote. Its ‘unobtrusive’ counterpart uses the list experiment estimator to model the treatment group’s responses to the indirect, unobtrusive version of the same question asked in the list format. Substantively, the former model estimates respondent propensity to *state* support for illiterate voting rights publicly, whereas the latter estimates respondent propensity to hold pro-suffrage preferences privately.

### *Model Specification*

I utilize the same set of explanatory variables in both models, which are as follows:<sup>52</sup>

*Community membership: Christian and Sunni.* I included two dummy variables as indicators of community membership, *Christian* and *Sunni*, making Shiites the baseline comparison category. For simplicity, and due to the small subsample size, Druze and Alawi respondents were excluded from this analysis, although including them does not change the substantive results.

*Material well-being: Electricity and Income.* The main indicator of material well-being used here is *Electricity*, which measures the number of hours per day in which the electricity is

<sup>51</sup> To clarify, illiterate people have the right to vote in Lebanon. In effect, the survey question simply asks whether or not illiterates should have voting rights, regardless of the current status of those rights.

<sup>52</sup> Part of the LISTIT procedure includes modelling the non-sensitive item probabilities with data from the control group to help extract the sensitive item probabilities from treatment group data. In this context, it is useful to note that the covariate predictors of the non-sensitive items are not technically constrained to be the same predictors as those of the sensitive item. This characteristic is helpful, given that youth *nos* and Palestinian *yeses* are rare events in the control group (4 and 5 per cent of responses, respectively), and thus modelling with covariates is unstable. Consequently, these two items are modelled with intercept terms only, whereas expatriates get the same covariates as the main model for illiterate voters.

off in respondents' homes (Figure 1c). In operational terms, *Electricity* is particularly useful because it provides an indicator of material well-being that is, at least potentially, more responsive and more directly tied to voting decisions than income would be. Electricity in Lebanon is a subsidized public utility, the spotty and variable coverage of which is provided by the much-maligned state-run *Électricité du Liban*; thus the state is directly and visibly responsible for the provision of this basic service.<sup>53</sup> Some apartment buildings, usually those inhabited by wealthier people, use private generators and thus permit better-off residents to partially exit from the system, but this luxury is unavailable to many Lebanese.<sup>54</sup> This variable takes a square-root transformation.<sup>55</sup>

I also employ *Income* as an alternate indicator of material well-being, but with an important caveat lector on data quality and operationalization. By itself, personal monthly income is unuseable due to very high non-response rates – 17 per cent overall, and rising to 29 per cent among Shiites. Rather than lose such a large proportion of the sample, which is surely not randomly distributed, *Income* takes the higher of personal and family income and makes non-responses (still high at 9 per cent) the bottom of the scale (Figure 1b).<sup>56</sup> The latter decision is based on the logic that the unemployed and families living at or below bare subsistence levels have irregular or informal cash incomes and cannot confidently estimate their own incomes, as well as the logic that embarrassment about poverty likely causes some of the poor to refuse to respond.<sup>57</sup> Given this non-standard use of the income scale, however, I used multiple specifications with and without the *Electricity* indicator, and all results remain qualitatively the same.

*Controls: Education.* Because the question of interest asks about voting rights for illiterate people, I control for *Education* using a 3-point education scale, rescaled to 0–1 for ease of interpretation.<sup>58</sup> The findings are also robust to a wider array of controls, including age, sex, rural residency and a measure of democratic commitments.

<sup>53</sup> Moreover, the subsidy for electricity is considerable, which indicates the extent of state participation in the provision of this basic service. In the year the survey was conducted, government support for the electricity sector reached a 'staggering' 4 per cent of annual GDP, and operating losses of *ÉdL* alone reached 2.5 per cent of GDP. See International Monetary Fund 2005.

<sup>54</sup> Only some 14 per cent of households reported that electricity is always available (Salti and Chaaban 2010). During the summer of 2008, for example, Beirut experienced daily rolling three-hour blackouts. Beirut's largely-Shia southern suburbs received far less, with one resident, an official at the Council for Development and Reconstruction, claiming that 'it is a happy day when we get 10 hours of electricity'. Interview, Beirut, July 2008. Other parts of the country were worse off still, with rationing exceeding twenty hours a day. Officials claim that the actual cost of electricity should be four times the current rate, which the president of the Higher Privatization Council describes as the result of 'purely chaotic' subsidies that have 'benefited rich people more than poor people'. See Daily Star 2008.

<sup>55</sup> Use of the square-root transformation has both practical and theoretical rationales. In practical terms, the transformation helps to ameliorate outliers in the raw data. Theoretically, we should expect increasing electricity (that is, material) deprivation to have a declining influence on attitudes. The difference between no hours and one hour off should have more influence than, say, the difference between fifteen and sixteen hours off. Note that Figure 1c's bin ranges (horizontal axis) implicitly follow this square-root scale.

<sup>56</sup> The main *Income* indicator is a five-point measure, scaled 0–1, with non-responses (the low point) comprising 9 per cent of the sample, less than \$250 4 per cent, \$250–500 20 per cent, \$500–1000 46 per cent and more than \$1,000 21 per cent. An alternate version, employed as a robustness check, is a four-point scale that combines non-responses and 'less than \$250' into one category.

<sup>57</sup> On this point, compare Cammett 2011.

<sup>58</sup> I condense the five points from Figure 1a into three points for simplicity (primary or less, secondary, college or more), but the results do not change when using the original five-point scale.

TABLE 3 *Results*

(a) Direct question	(1)		(2)		(3)		(4)		(5)	
	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>
Intercept	3.119	0.915*	3.370	0.852*	3.473	0.829*	2.805	0.945*	2.881	0.934*
Education	0.669	0.563	-0.774	0.567	-0.808	0.568	-0.721	0.568	-0.747	0.570
<b>Christian</b>	<b>-2.049</b>	<b>0.775*</b>	<b>-2.210</b>	<b>0.774*</b>	<b>-2.213</b>	<b>0.774*</b>	<b>-2.117</b>	<b>0.780*</b>	<b>-2.114</b>	<b>0.780*</b>
<b>Sunni</b>	<b>-1.565</b>	<b>0.827<sup>‡</sup></b>	<b>-1.774</b>	<b>0.788<sup>‡</sup></b>	<b>-1.777</b>	<b>0.788<sup>‡</sup></b>	<b>-1.552</b>	<b>0.820<sup>‡</sup></b>	<b>-1.541</b>	<b>0.822<sup>‡</sup></b>
Electricity	0.217	0.168					0.188	0.170	0.194	0.169
Income			0.717	0.594			0.662	0.608		
Income (alt.)					0.653	0.591			0.596	0.603
ln(L)	-87.3		-88.4		-88.5		-86.7		-86.8	
n	230		237		237		230		230	
(b) Unobtrusive question										
	(1)		(2)		(3)		(4)		(5)	
	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>	<i>b</i>	<i>se(b)<sup>p</sup></i>
Intercept	0.424	1.456	3.662	1.415*	3.020	1.242*	1.577	1.502	1.008	1.314
Education	0.614	0.906	0.911	0.780	0.944	0.792	1.312	0.964	1.328	0.970
Christian	-1.898	1.886	-1.278	0.928	-1.307	0.953	-1.007	1.322	-1.002	1.250
Sunni	-1.181	1.572	-1.426	0.973	-1.421	1.015	-0.694	1.264	-0.751	1.190
<b>Electricity</b>	<b>0.967</b>	<b>0.373*</b>					<b>0.902</b>	<b>0.300*</b>	<b>0.851</b>	<b>0.286*</b>
<b>Income</b>			<b>-2.579</b>	<b>1.249<sup>†</sup></b>			<b>-3.124</b>	<b>1.342*</b>		
<b>Income (alt.)</b>					<b>-1.901</b>	<b>0.977<sup>‡</sup></b>			<b>-2.390</b>	<b>1.147*</b>
ln(L)	-928.6		-961.2		-961.3		-923.4		-924.0	
n	696 (186)		718 (191)		718 (191)		696 (186)		696 (186)	

\* $p \leq 0.01$ ; †  $p \leq 0.05$ ; ‡  $p \leq 0.10$

## RESULTS

Table 3 summarizes the estimated results from the two models. Mechanically, Hypothesis 1 predicts negative *Sunni* and *Christian* coefficients (Shiites are more supportive than others), whereas Hypothesis 2 predicts a positive *Electricity* coefficient (more deprivation leads to higher support) and a negative *Income* coefficient (higher income leads to lower support). These results show that although both hypotheses receive empirical confirmation, that support differs in a predicted and qualitatively important way. In particular, H<sub>1</sub>, positing identity motivations, explains what people are willing to *say publicly* about illiterate voting rights, whereas H<sub>2</sub>, positing material motivations, explains what people *think privately* about those rights. Put simply, if one asks the question directly, one receives a sectarian answer, but if one asks the question unobtrusively, one gets an answer about material deprivation. To ease substantive interpretation, I plotted the key results on a probability scale in Figure 2.<sup>59</sup>

Figure 2a demonstrates that, when asked directly, Shiites are systematically more likely than their counterparts in the other communities to claim support for illiterate voting rights. Figure 2b shows that they are some 13 per cent more likely than Sunnis to support illiterate voting and 25 per cent more likely than Christians in relative terms.

<sup>59</sup> I use the observed value approach when translating the results to the probability scale (Hanmer and Kalkan 2012). All plots are based on the fourth column of Table 3, which includes both *Electricity* and *Income*, but estimates from other specifications produce qualitatively similar results.



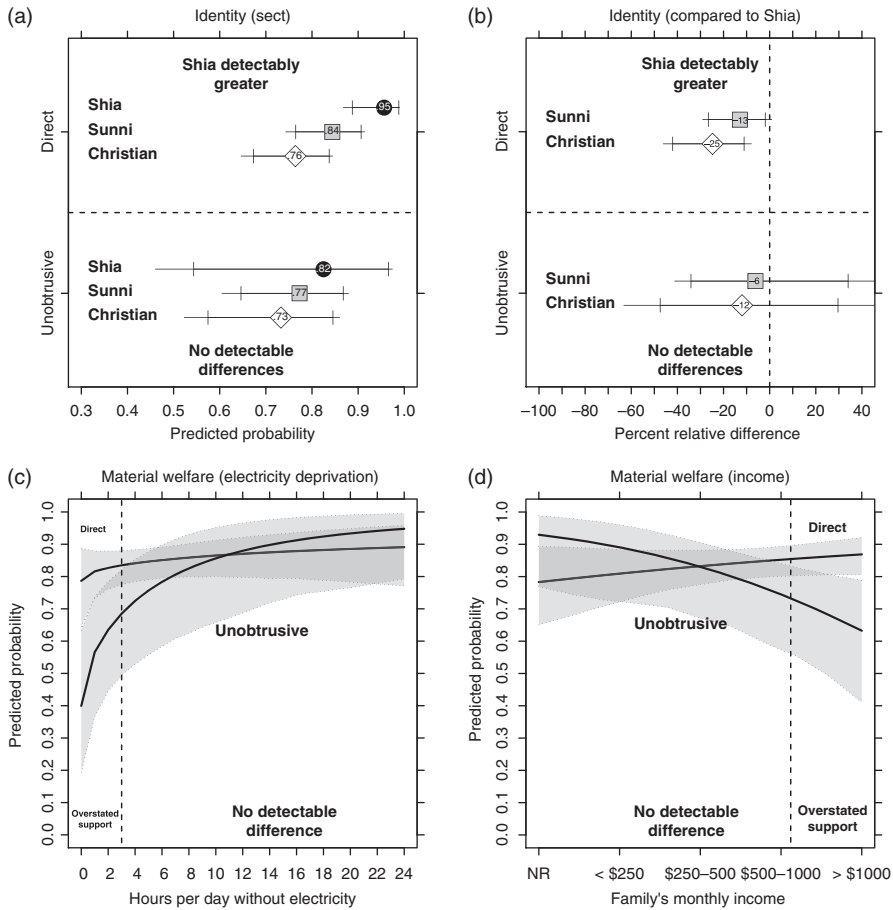


Fig. 2. Identity versus material motives: public (direct) and private (unobtrusive)

When answering the unobtrusive question, in contrast, community-based differences disappear as the gaps between the sects shrink to undetectable sizes.<sup>60</sup>

Meanwhile, exactly the opposite switch occurs with material influences. Neither *Electricity* nor *Income* predicts support for illiterate voting when people answer direct questions. As Figures 2c and 2d reveal, the ‘direct’ effect flatlines across measures of material deprivation. In contrast, both indicators predict support in the anticipated direction when respondents answer unobtrusive questions. The ‘unobtrusive’ effect in Figure 2c shows that people who frequently lose electricity in their homes are significantly more supportive of illiterate voting rights than their better-off peers who rarely lose electricity. The analogous effect in Figure 2d demonstrates

<sup>60</sup> For the direct question, the Shia-Sunni and Shia-Christian differences are detectable at the 95 per cent level; the 11 per cent relative difference between Sunnis and Christians is nowhere near detectable at conventional levels of statistical significance. With the unobtrusive question, the Shia-Sunni, Shia-Christian and Sunni-Christian gaps shrink to less than half their original size (6, 12 and 5 per cent, respectively) and none of the estimates is remotely close to conventional levels of statistical significance.

that low-income respondents are more supportive of illiterate voting than their wealthier peers.<sup>61</sup>

Finally, the dashed vertical lines in Figures 2c and 2d indicate where people's public claims and private preferences diverge. As anticipated, better-off people are more likely to overstate their support for illiterate voting rights. People who lose electricity three or fewer hours per day – some 16 per cent of the sample – are detectably more supportive of illiterate voting in public than they are in private. Those who never lose electricity are nearly twice as likely to claim support for such rights as they are to support them in private, and those at the 3-hour mark are some 22 per cent more likely in relative terms. Analogously, wealthier people with family incomes over \$1,000 a month – about 21 per cent of the sample – are an estimated 37 per cent more likely to publicly claim pro-voting positions as they are to hold them privately. In contrast, there are no detectable public-private differences among people suffering from greater material deprivation.<sup>62</sup>

#### DISCUSSION: 'OF COURSE IT'S POOR PEOPLE'

In summary, identity interests do, and material interests do not, have explanatory leverage in accounting for *what people say* about illiterate voting rights. In explaining *what people think* about those rights, however, material interests trump identity interests. Better-off people tend to overstate their public support for illiterate voting. Hypotheses 1 and 2 both receive empirical support, but in qualitatively distinct ways: identity interests explain public statements in support of illiterate voting rights, and material interests explain private preferences regarding those rights.

In Lebanese public discourse, it is common for issues not obviously linked to sectarianism to take on a sectarian tone. Those who study ethnic politics elsewhere in the world will likely find this dynamic familiar. Yet how people talk about these issues, and what they actually think about them, are not necessarily the same. When I described the results of the list experiment to one Lebanese party activist, his response was to smile ruefully and exclaim 'of course it's poor people'. The results also lend credence to an anti-sectarianism campaigner's eloquent observation that 'for the poor, their belief in bread unifies them, and the few bits of scripture they know do not divide them'.<sup>63</sup>

These results do not, however, imply that Lebanese sectarianism in particular – or ethnic identity more generally – are epiphenomenal of class interests or anything else.<sup>64</sup>

<sup>61</sup> Social pressure to give sectarian answers affects all Lebanese, regardless of sect. Nonetheless, one possible extension would re-estimate these models within each community subsample to examine whether or not the same dynamics hold within each sect. Although desirable, we confront practical data limitations: the subsamples are too small (around  $n = 300$  each) to support the estimation procedure. The list experiment is 'costly' in that it trades precision for consistency, producing wider error bands around the 'right' estimates. Moreover, simulations suggest that the estimator needs approximately 1,000 observations to produce reliable estimates (Corstange 2009). When applied to the much smaller subsamples here, standard errors are large, coefficient estimates are unstable and the models often fail to converge. Within-community analysis must therefore await future research with sufficiently large sample sizes.

<sup>62</sup> The differences reported are statistically detectable at the conventional 95 per cent level; the more permissive 90 per cent level shifts the electricity cut-off to about four hours and the income cut-off to the \$500–1,000 category.

<sup>63</sup> Interview, Beirut, July 2008; Sayegh 2007, p 19.

<sup>64</sup> We must, of course, exercise some caution in interpreting these results. That poorer people are privately more supportive of illiterate voting rights than their richer counterparts is consistent with their class interests, but it does not necessarily mean that they consciously conceive of the question in class

Rather, they simply suggest that people respond contextually to multiple incentives, and that identity does not always trump all other factors. Scholars of ethnic politics sometimes refer to a society's 'master narrative', and the Lebanese do indeed narrate sectarianism to each other *ad nauseam*. There are, however, multiple stories unfolding simultaneously, some of which diverge substantially from that master narrative.

Sectarianism provides the recurring tropes that the Lebanese use to structure their arguments in public discourse. As Scott cautions, however:

Unless one can penetrate the official transcript of both subordinates and elites, a reading of the social evidence will almost always represent a confirmation of the status quo in hegemonic terms.<sup>65</sup>

The list experiment, meanwhile, grants us a 'privileged peek backstage' to look beyond the official transcript. The evidence I have presented suggests that Lebanon's sectarian status quo has been built (at least partially) on social pressure and preference falsification.

## CONCLUSION

Are voting rights a class or an ethnic issue in the plural societies of the developing world? This article argues that they are both, but in different contexts: ethnic in public, but class in private. Illiterate voting rights impact people's welfare along a material dimension via taxation and redistribution and along an identity dimension via social status and dignity. Some endowment combinations require trade-offs between the two dimensions, but such trade-offs are asymmetric: people consume material goods privately but identity goods collectively. Social pressure in favour of group solidarity helps mitigate the free-rider problems that otherwise plague the pursuit of collective identity interests, but with an important limitation: social pressure affects what people claim publicly, but not what they think privately. Views on voting rights are thus open to preference falsification.

Explanations of what motivates attitudes in the context of ethnic competition largely distill to arguments about identity versus material interests. Mixed empirical evidence tends to support claims about identity motives, but this article's findings suggest that the empirical record is incomplete and potentially deceptive. In particular, we should take care to consider that people respond to different incentives when *claiming* versus *holding* attitudes, and identity-based statements may belie private opinions. The claims that people make in the context of salient ethnic identities are subject to social pressure in favour of group *solidarity* and *unity* and against *selling out* and *betrayal*. Under such conditions, the individual exit option 'abruptly changes character ... the applauded rational behavior of the alert consumer shifting to a better buy becomes disgraceful defection, desertion, and treason'.<sup>66</sup> Given these connotations, should we really be surprised if people whose attitudes follow their material interests decline to say so?

(Footnote continued)

terms. That Shiites are publicly more supportive of those rights than Sunnis or Christians is, again, consistent with their social identity interests, but does not necessarily mean that they view the question as inherently about sect. Ideally, future research can experiment with different operationalizations of material and identity interests to provide more rigorous measures of these latent constructs.

<sup>65</sup> Scott 1990, p 98.

<sup>66</sup> The quote is from Hirschman 1970, p 98. Compare a related form of racial discourse in the United States, in which newly prosperous African-Americans encounter social pressure to forward their community's interests. Those who fail to meet demands that they 'act black' face accusations of being 'sell outs', 'Uncle Toms' or 'Oreos' (black on the outside, white on the inside). For a recent exchange between

The evidence I present in this article confirms the predicted divergence between publicly stated and privately held preferences. Moreover, it demonstrates that we need to go the proverbial extra mile when studying issues, such as illiterate voting, in which we anticipate preference falsification. Prior studies have not asked questions in this way, in part because we lacked the empirical techniques to answer them effectively. Yet a complementary and more subtle reason is that we have had blinders on regarding ethnicity and identity, which are analogous to the class blinders that hampered previous work.

In particular, we have perhaps been too quick to accept people's stated identity-based answers as evidence of identity-based propositions without stopping to question whether we are being spun by our survey respondents and elite interviewees. To the degree that some of this article's claims and findings run counter to our intuitions, it is arguably because those intuitions have been informed inductively by empirical studies that rely on evidence contaminated by preference falsification. That people care about identity interests, and are willing to sacrifice some material interests to pursue them, is by now exceedingly well established. What I am suggesting is more modest and (I hope) more productive: that we discard *all* of our blinders, both ethnic and class.

We should, however, pause to consider how 'class conflict' manifests in developing-world countries such as Lebanon, where parties tends to favour clientelism over political programs.<sup>67</sup> In stylized form, clientelistic parties reward supporters with contingent, direct payoffs rather than with policy-based redistribution. By distributing material rewards to poor voters, clientelism arguably serves as a tool for managing class conflict – albeit on terms more favourable to the rich – by curtailing the scope of redistribution.<sup>68</sup> Enfranchising more poor voters, however, obliges politicians to transfer at least some patronage resources to the poor in order to prevent them from supporting political opponents. Even in a purely clientelistic setting, then, illiterate voting rights shift material resources to the poor and away from wealthier clients who might have otherwise received them.

In practice, of course, parties vary their appeal rather than rely solely on clientelistic linkages or programmatic payoffs. Patronage politics persist in a number of developed democracies such as Italy and Japan, while clientelistic parties in the developing world also

*(Footnote continued)*

African-American athletes of different socio-economic backgrounds, see 'Grant Hill's Response to Jalen Rose', *New York Times College Sports Blog*, 16 March 2011. Available from <http://thequad.blogs.nytimes.com/2011/03/16/grant-hills-response-to-jalen-rose/>.

<sup>67</sup> A number of Lebanese parties in the pre-civil war era attempted to form 'progressive' fronts espousing socialism, Arab nationalism and an end to Lebanon's sectarian power-sharing system. Consistent with the observation that ethnicity can serve as a barrier to class conflict (Horowitz 1985), conservative elites sought to provide sectarian alternatives to left-wing parties. Musa al-Sadr, the leader of the Shia movement that eventually became today's Amal, built a political organization in part to keep his fellow sectarians from joining parties such as the Communists and the Baathists, and to receive tacit support for his efforts from conservative elites from other sectarian communities, notably the Maronites.

<sup>68</sup> Kitschelt (2000, pp 848–9), for example, observes that 'resource-rich but vote-poor constituencies' fund politicians in return for favours, while 'resource-poor but vote-rich constituencies' provide their votes instead. More broadly, clientelism can provide a means for the rich to buy off the poor piecemeal and forestall potentially more expensive demands for programmatic redistribution. A common supposition in the vast literature on clientelism is that parties prefer to buy support from poor voters because they have lower reservation prices than their rich counterparts (that is, their votes are cheaper). Some empirical studies, however, show that clientelistic transactions extend well into the middle classes, suggesting that the conceptual link with poverty is less strong than we commonly suppose. See Hicken 2011; Keefer 2007; Keefer and Vlaicu 2008; Kitschelt and Wilkinson 2007; and Stokes 2007.

service their constituencies with program-based redistribution.<sup>69</sup> Even in societies where electoral clientelism is rampant, many voters resist patronage appeals and cast issue-based votes instead.<sup>70</sup> To the degree that at least some poor voters cast programmatic ballots, they shift the median voter to the redistributive left. Hence clientelism makes electoral dynamics more complicated, but does not eliminate the basic conflict over material resources so much as provide an additional channel through which to allocate them.

This article examines individual motivations rather than the strategic environment in which people choose parties or the rhetoric employed to persuade voters.<sup>71</sup> Regardless of what motivates them individually, however, we must still ask related questions about their revealed preferences – that is, aggregate vote outcomes – for ethnically based or class-based parties. Arguably, we should integrate what we know about sincere and strategic voting to answer this broader question. If class (ethnic) appeals are demonstrably non-credible in a given society, we should not expect many people to respond to them even if they agree with the principles espoused, which in turn raises further questions about *why* such appeals are non-credible.<sup>72</sup> Further, we should also integrate insights from framing theory to understand how parties frame political cleavages.<sup>73</sup> Such considerations are especially relevant in societies with coexisting class and ethnic cleavages, as in Melson and Wolpe's classic analysis of ethnic versus class framing in Nigerian elections.<sup>74</sup> This article thus offers a start rather than a definitive conclusion to this line of inquiry, which awaits systematic comparative research.

In closing, let me highlight two potentially useful extensions to the ideas found in this article. The first extension would vary the collective nature of the identity good being contested. I stated that, theoretically, identity goods are collectively consumed club goods. In practice, however, we can conceive of variations in how perfectly collective they are. Illiterate voting rights approximate a good with collectively consumable identity benefits. In contrast, other goods with identity ramifications may be more subject to private capture – a salient and frequently contested example of which would be highly visible and prestigious state positions. Such jobs, if filled by coethnics, would be identity enhancing for group members because they generate representation and dignity for that group. Yet the positions themselves would be filled by *individuals* rather than groups, and thus many of the specific benefits of those positions would be

<sup>69</sup> Kitschelt and Wilkinson 2007; Magaloni 2006; Piattoni 2001.

<sup>70</sup> Based on another list experiment, for example, I found that a little over half of the Lebanese electorate sold its votes in the 2009 elections (Corstange 2012b). Although this is a normatively disquieting proportion on its own, the relevant point here is that just under half of the electorate did *not* vote on the basis of patronage rewards. Hence, even under conditions of pervasive clientelism, substantial numbers of voters do not vote on the basis of patron-client relationships.

<sup>71</sup> We might speculate that environmental shifts in the degree of ethnic cooperation versus conflict within society could alter the 'ethnic in public, class in private' dynamic. For example, if relations between ethnic communities become more cooperative, people may be more willing to voice class interests in public, whereas more conflictual relationships may push people to place additional emphasis on ethnic interests in private. Alternately, more conflictual relationships may push people to put additional weight on ethnicity in private – perhaps because threats to identity make that component more salient, or threats of ethnically directed violence make physical security more immediately important than the distribution of material resources. These questions must await future research, however; given the snapshot nature of these data, we lack variation in the environment along these lines.

<sup>72</sup> Keefer 2007; Keefer and Vlaicu 2008.

<sup>73</sup> Chong and Druckman 2007.

<sup>74</sup> Melson and Wolpe 1970.

privatized, such as salary, perks, job security, personal (as separable from group) prestige and so on.<sup>75</sup>

In fact, we might imagine that rich and poor coethnics could come to a tacit bargain in which the rich expend material resources to generate identity goods, the benefits of which accrue to all members, and the poor compensate the rich for these material expenditures by voting them into lucrative state positions, the material perks of which the rich consume privately.<sup>76</sup> We might then expect to observe different dynamics among the rich, depending on whether or not some of the benefits of the club good can be captured privately, such as with state positions. If so, we would observe a divergence between what people say and what they think about collectively consumable goods, but no such superficial-versus-sincere divergence for privately capturable goods. Testing this proposition would require additional empirical data that could be collected with a list experiment analogous to the one used in this article, and awaits future research.

The second extension would vary the discursive environment in which people make trade-offs. A telling extension would examine societies in which class dominates public discourse, but that also harbor ethnic cleavages. There are two sets of potential places from which to draw. The first comprises current (and perhaps recent) communist states such as Cuba or Laos that govern populations that are potentially subject to ethnic competition. Mitigating the usefulness of such cases, however, is the practical difficulty of conducting social scientific research in police states, alongside the possibly complicating ideological baggage of Marxism. The second set, potentially more promising, includes Latin American countries such as Bolivia in which indigenous movements, utilizing class-based discourse about a struggle between rich and poor, have either taken power or have fallen just short of doing so.<sup>77</sup> Scholars with more extensive case familiarity will be better able to judge the merits of such venues and propose alternatives, but the point is that such cases offer an opportunity to examine interest trade-offs in a different discursive environment.

Democracy does not exist without elections, nor elections without voters. Who gets to vote is therefore a core question of both democratic theory and practice. In addition to normative considerations, voting rights can factor into both class and ethnic conflict because of the material and identity ramifications of those rights. Whereas an expansive body of prior studies on ethnic politics has debated whether people's policy preferences respond to material or identity incentives, this article suggests that, at least in the context of illiterate voting rights, both sides of the debate may be correct, but in different contexts. Although the discourse about those rights follows from ethnic competition and identity concerns, what underlies that discourse are prosaic material interests.

<sup>75</sup> This conjecture is consistent with Chandra's (2004, pp 11–12) observation that proximity to those holding state office may offer not only material benefits in the form of patronage, but also provide people with the opportunity 'to bask in the reflected status of the patron'. Meanwhile, state employment provides those patrons – upwardly mobile, modernizing elites who are 'urbanized, educated, and economically better off than the rest of the population' – with their best prospects of advancement. Compare also Hardin's (1995, p 57) discussion of competition over positional goods.

<sup>76</sup> In Lebanon, parliamentary seats are filled via an explicit sectarian quota, and civil service positions are still largely filled using such quotas (Bashir 1994, 2006), implying that the poor cannot credibly offer to put more of their coethnics in power because the proportion of positions is exogenously fixed. They can, however, determine *which* coethnics get those positions via the often-observed phenomenon of ethnic outbidding, in which the community's limited number of positions goes to those individuals who most stridently support (or claim to support) their community's welfare.

<sup>77</sup> Van Cott 2007.

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