

# Strategic Marginalizations, Emotional Marginalities: The Dilemma of Stigmatized Identities

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As befits this volume, and the conference on which it is based, let me start with the root metaphor of a margin, a seemingly spatial and hence structural image. But I would like to point out the active work behind it, which is not really structural at all. ‘Margin’ is a complex word, taken almost straight from Latin, and no doubt derived from Indo-European before that.

First of all, a margin is a border, and especially what is just inside that border: on the edge, peripheral, superfluous, not fully fitting in. But at the same time, when it comes to the printed page, it is a place for notes and commentary—*marginalia*—that can be extensive and important. In the case of sacred scripture, for instance, it is often the *marginalia* that explains it, and which do the real work of telling believers what to do. These interpretations are often more elaborate than the scriptures themselves. And this in turn shades into a third meaning, of margins as a kind of buffer that protect the core, as in a margin of error or a margin of profit. So we run the gamut from rather negative to quite positive meanings of the word.

This range of meanings suggests that, despite the idea of a distinct place, a part of a structured whole, margins are, like everything else, culturally constructed. Hence the term ‘marginalization,’ which is a process rather than a state of being. To marginalize someone is an active strategy, although it need not be an intentional one; it could be a byproduct of something else. And yet, because it *is* such a powerful strategy—in that it excludes a player, typically a group, from an arena—I suspect that it is usually quite intentional.

But it is also quite an emotional strategy. All strategies involve emotions, of course, but with some, emotional effects are the main intent. With marginalization, there is not just formal exclusion, but the creation of a *feeling* of exclusion, of being an outsider, of being, well, marginal. It strips human dignity from someone, as well as stripping them of the confidence needed to act politically, to be a player. (That confidence is hugely important for successful strategic engagement.)

I should add that the original meaning of the English verb ‘marginalize,’ in the nineteenth century, was to write margin notes on a text, in other words to cast light on the centre, to interrogate it, rather than to push something from the centre into the margins. And so this conference and volume are meant to examine the margins in order for us to understand the whole of society.

Marginalization is a central political strategy, and at the centre of marginalization is an effort to create a damaged or stigmatized identity for a group, as a way to disadvantage it strategically. And in many ways, that assault on the basic human dignity matters more than the material deprivations that usually result from it.

I would like to use the example of marginalization as an opportunity to suggest the possibilities of a strategic and emotional vision of protest (drawing on Jasper, 2006). I will proceed by talking about one strategic dilemma, what I call the *Dilemma of Stigmatized Identities*, and show how it’s related to several other dilemmas.

Now, thinking in terms of strategic dilemmas and trade-offs is already a fairly new approach to the study of protest (Jasper, 2004). But I want to challenge you even more by bringing in emotions and linking them with strategy. This is also a fairly new –or at least revived–topic in the study of protest (Jasper, 1997, 1998; Goodwin et al., 2000, 2001; Goodwin and Jasper, 2006; Clarke et al., 2006), and one which at first seems very distant from strategy. In fact, the classic opposition in research and theory has been to contrast expressive movements with more purposive, rational, strategic movements—a deeply mistaken approach, I believe, which distorts every kind of movement.

Although this is a theoretical argument, I shall illustrate it with two cases, African-American in the United States and Dalits in India. I employ only secondary sources for each. My knowledge of the Dalit case is especially scanty.

The *Dilemma of Stigmatized Identities* is as follows: You want to

mobilize to change or eliminate the identity, but you need to use that same identity to mobilize people. So you run the risk of strengthening the label you're opposed to. This is a dilemma both at the level of means, of how to get what you want, and at the level of ends, since moral dignity arises *both* from abolishing the stigma *and* from organizing politically.

One sign of this kind of struggle is cycling through different names for a group, in efforts to soften the stigma for certain audiences. For American blacks, one hundred years ago, 'coloured people' was the accepted term (as in the National Association for the Advancement of Coloured People NAACP, founded in 1910), then for much of the twentieth century it was 'Negroes'. 'Blacks' became popular in the 1960s, linked to the black power movement. There was Afro-American, people of colour, and more recently African-American, although the term Black remains popular as well. My impression is that there has been a similar series among India's Scheduled Castes, Untouchables, exterior castes, depressed classes, Harijan, Dalits, and so on. In addition to implying slightly different groupings with different boundaries, behind each term there's a political agenda, aimed at having an effect on a certain audience. Sometimes the audience is within the group, other times it is outsiders.

This agenda links the stigmatized identity dilemma to another common strategic dilemma, the *Janus Dilemma*, over how much attention and effort to put into your own membership versus how much to put into outsiders: reaching in versus reaching out (Mansbridge, 1986; Jasper, 2006: 125). The ways that you take pride in your own identity are rarely the same ways that you appeal to others (but make no mistake: both are strategic acts: Bernstein, 1997). Separatism is always appealing. I gather that for Dalits, there has been a tension between placing one's caste in the ancient Hindu texts, for example finding a heroic ancestor, and converting altogether to another religion—Ambedkar's famous approach towards the end of his life (Ambedkar, 1948/1990).

It is not only the groups themselves that must grapple with the Dilemma of Stigmatized Identities. Authorities and supporters often do as well. For instance the Nehruvian State refused to collect data on caste, and none were collected until the end of the 1990s (Deshpande, this volume). The Government of India was grappling with the Dilemma of Stigmatized Identities: would it reinforce caste to collect these data? How could this be balanced with potential

benefits? At the same time the as state created reservations to help the oppressed castes, reinforcing the identity and igniting resentment on the part of others, it hesitated to collect the data that would help it judge whether it was succeeding. (An aside: from a purely strategic perspective, this is reasonable: a player tries to avoid setting up clear criteria of success unless it is pretty sure it can meet them.)

The Dilemma of Stigmatized Identities also links up with what I call the *Extension Dilemma*: how large, how extensive, a team do you try to build? How inclusive are you? A stigmatized population may consist of many sub-units that feel no solidarity with each other, and instead often feel mutual hostility. This seems especially the case of lower castes, who can always find someone even lower to hate.

So a stigmatized caste may be able to go back in history or in classical texts, and find a hero that it can link to its caste, in an effort to arouse pride, but the very specificity of that effort is going to emphasize the one caste, not link it to other stigmatized castes in any broader solidarity. On the other hand, the Bahujan Samaj Party (BSP), say, can compose songs that praise the strength and history of Dalits generally, but they will lack the particular resonance of symbolic individuals, who are mostly going to be from a single caste (Narayan, 2006: 79).

Among African-Americans, too, there was always some tension between those with lighter skins and those with darker skin (Landry, 1987), but nothing like the caste tensions in India. A better US parallel might be the tensions between poor whites and poor blacks, which has rarely worked out well. One source of the tension is privileges granted strategically by those in power: many black Americans worked for schools and the government, and risked losing their jobs if they fought for civil rights. Just as castes like the Pasis often worked as henchmen for landlords, imposing their discipline upon other, even lower castes (Narayan, 2006: 89-90).

The rhetorical use of history raises another dilemma closely related to the Stigmatized Identity Dilemma: between emphasizing the atrocities perpetrated against a group, which plays up oppressors as villains but at the same time reinforces the group's victimhood, versus on the other hand emphasizing a group's heroic actions, which gives it confidence for further action and mobilization (van Deburg, 1992: 272-80). The two approaches can coexist: African-Americans told the legends of Shine and Stagolee, of John Henry, as well as the histories of Harriet Tubman and Nat Turner. But the two can be

combined only in the heroism of endurance, strength in the ability to survive, which is morally impressive but not always the best basis for new mobilization. It provides dignity but not the confidence for strategic engagement. Although Martin Luther King Jr. exhorted his followers, 'Don't get weary. We will wear them down with our capacity to suffer', the setting, in Albany, Georgia, represented one of King's few failures.

Affirmative action programmes obviously get entangled in the Dilemma of Stigmatized Identities: there are real benefits to gain from these programmes, but those same programmes highlight and make permanent the categories you are fighting against. In the United States, many blacks and especially Hispanics do *not* want to be hired with the help of affirmative action, although even when the special help becomes informal, they often can't avoid some suspicions (on the part of others, usually) that there was some ascription rather than merit involved. Just as some castes in India in the 1930s debated whether or not to get on to the Schedule. At least one refused to be counted an exterior caste in the 1931 census, but did go for the Schedule in 1936 (Mendelsohn and Vicziany, 1998: 39).

In both the cases, affirmative action has spawned a backlash. Many working-class white Americans flocked to Reagan and the Republican Party in the 1970s and 1980s because they saw the federal government as favouring blacks (Edsall and Edsall, 1991), just as today many members of Hindu castes see their own government as pampering Dalits, providing more reservations than is deserved (Gadekar, this volume).

Stigmatized groups often advance by finding new audiences with whom they are not stigmatized. They manage to gain new pride through these new interactions, as well as resources in some cases. International arenas benefited American blacks as well as Indian Dalits. In the 1950s, politicians at the federal level in the United States were concerned with the nation's reputation abroad, as the Soviet Union used race to portray the United States as hypocritical. How could this government talk about democracy and liberty for other nations, when it denied basic political rights to so many of its own citizens (Skrentny, 2002)? Similarly Dalits, in the 1990s, were able to attract considerable attention and some mobilizing resources from sympathetic international NGOs (Bob, 2007). In trying to assess the benefits and costs to Dalits of globalization, Koteshwar and Shinde (this volume) find that the harm is mostly because they

are poor, while many of the benefits come from international audiences with whom the Dalits are not stigmatized (my interpretation, not theirs).

For both these stigmatized groups, large-scale migration to emerging industrial cities was also a boon, breaking the back of more traditional forms of subordination. Dalits have been able to simply ignore or disguise their backgrounds. Urban black Americans in the middle of the twentieth century were able to develop institutions outside the watchful eyes of whites, as well as to accumulate some resources that could be channeled through black churches to the Southern civil rights movement (Morris, 1984). Cities offered refuge from the direct, personal subordination and humiliation that was especially devastating to both dignity and confidence.

One final issue also shows the common strategic situation of groups with stigmatized identities. For both African-Americans and Dalits there are ongoing debates over average IQ scores—reflecting efforts to pseudo-speciate the group as part of its stigma and to undermine support for affirmative action programmes.

I don't want to give the impression that a strategic approach is a matter of cold calculation, of maximization, or hyper-rationality, as economists and rational-choice theorists might have it. So I want to mention briefly some of the emotions that are a central part of the dilemmas around stigmatized identities.

First, there are the emotions of potential recruits, who almost by definition harbour shame from the stigma (Gould, 2001). Recruiters have to transform shame into pride, although how they do this will depend on the substance of the stigma and shame: What exactly are they based on? If they are based on *weakness*, recruiters presumably have to arouse a sense of power, which at any rate is crucial to mobilization in general. If they are based on some sense of inherent *pollution*, organizers must presumably craft a way out of the cultural codes that define pollution, such as by converting to a new religion. If the stigma is based on *pseudo-speciation*, on seeing and treating the group as though they were animals and not fully human, then the effort goes into finding heroes who embody human dignity, who have intellectual accomplishments, or are religious virtuosi, and so on. The propensity to call the leaders of these two movements *Doctor King* and *Doctor Ambedkar* is presumably an effort of this kind.

None of this is easy work, because stigmatized groups are caught in a vicious circle. No matter how large they are, they lack a sense of

agency, of confidence in their own ability to act, and yet it is mobilization that best gives them that confidence.

Of course, there are complicating emotions, such as outrage over atrocities, and hatred and hostility for the oppressors, which a focus on past oppression can stoke up. Shame and rage can combine in a vicious way that I think helps us understand the motivations of suicide bombers in many nations, for whom destruction of the enemy has become an end in itself.

Then there are the emotions of other players. They may feel disgust for the stigmatized group, or they may feel fear of it. At least fear recognizes it as dangerous, powerful, and threatening, a characterization that might help the group attain some pride on that basis. Many white Americans have been afraid of black men, but that very recognition of the latter's power has been a source of pride, of organizing, and eventually of more positive tropes, such as sports heroes, action heroes in movies, or even armed guerilla heroes like the Black Panthers.

Disgust is a tougher emotion to work with, since it operates at such a gut level: it is one of a small number of reflex emotions, which have a kind of automatic quality to them. In its most primitive form, sheer physical contact can trigger disgust, making alliances difficult.

I have only suggested some of these pathways for research that could help us understand the dynamics of stigmatized, marginalized groups, and the potential ways they have out of their status. The world of strategic engagement is complex, with few easy choices. Instead, it is full of dilemmas—choices among several alternatives, each of which comes with a long list of costs, benefits, and risks, each a combination of predictable and unpredictable outcomes.

Let me sum up by pointing out a central advantage of a strategic approach—its concreteness. There have been lots of essentialist debates about marginal groups: Is caste in India similar to racism in the United States? Is racism an essential part of American culture? Is caste a central part of Hinduism, or a perversion of it? It seems to me that questions like these are unanswerable, because they are about what root metaphors we should use, and about what mysterious underlying structures there are at work in a society. They portray as timeless truths what are in fact the outcomes of constant struggle over meanings and practices.

In contrast there is nothing mysterious about strategic choices.

They are easily observed. You can see groups making them. It doesn't matter how race and caste are different or similar: You see concrete groups, real people, facing similar decisions. You can compare their choices, you can compare their effects, you can work with variables rather than essences. (Emotions are also eminently observable, or at least more observable than our cognitions.)

Essences may be alright for philosophy or religion, but they disrupt social science, they prevent us from understanding what is going on right in front of us. In general, I think we need to pay attention to the little things, rather than starting with the big ones. We need to build from the bottom up, not start at the top and deduce from abstractions and essences what we should find at the bottom.

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