

Atlantic Fellows

FOR SOCIAL AND  
ECONOMIC EQUITY

# AFSEE Inequalities Glossary



**The Atlantic Fellows for Social and Economic Equity (AFSEE)**, housed at the LSE International Inequalities Institute, is funded through a landmark grant from Atlantic Philanthropies. AFSEE's mission is to create and support a community of changemakers coming from around the globe that are working to address social and economic inequalities. Through research, education, and practice we support and encourage dialogue and collaboration between a range of stakeholders, including academics, activists, artists, practitioners, and policymakers to develop new thinking, ideas, and values-led approaches to tackle social and economic inequalities. We believe that equity can be achieved through bold, imaginative responses that are forged through collective action and aligned to the values of fairness, commitment, curiosity, kindness and courage.

The **AFSEE Inequalities Glossary** is a project led by AFSEE Programme Lead Dr Sara Camacho, aiming to demystify key concepts that are often discussed when theorising, researching, and attempting to address issues of social and economic inequalities. The selected entries relate to AFSEE's own programme of study and the terms that this programme uses in understanding (and challenging) inequalities globally. These terms represent the width and breadth of the AFSEE curriculum. Each entry consists of a short definition of the term of approximately 300 words. It also includes links to further resources, openly accessible on the internet, and linked to other related entries.

Our intended audience includes any researchers, policy advocates or makers, grassroots organisers, civil society activists, teachers, or any other social change practitioner, regardless of area of focus. It aims to be written for non-subject specialists who have a shared interest in challenging social and economic inequalities.

Our hope is that this project contributes to a wider, open access, shared knowledge. At AFSEE, we believe that inequalities are not inevitable, and one key step of ensuring this is to make knowledge and concepts around inequalities and justice accessible to all.

Please feel free to contact us at [afsee@lse.ac.uk](mailto:afsee@lse.ac.uk) should you have any comments or suggested additions to the glossary.

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# Agency

**Agency** is a philosophical concept that refers to a person's sense of control over their own actions and their consequences. As such we call 'agents' anyone who has the capacity to act in a deliberate way, which raises questions of intentionality, free will and self-determination. In sociology scholarship, a fundamental debate is that of the relationship between structure and agency in shaping human behaviour, also known as the micro-macro problem. While social systems are a product of individual actions, they also constrain agents themselves and influence their decisions.

The question of agency is addressed in sociology in varied ways, ranging from Talcott Parson's theory of action and the Bourdeusian concept of habitus. For structuralists, one's agency is limited by ideology which impedes our autonomy. Marx, for example, considers that human agency is a collective rather than a function of individual action, which relates to Gramsci's notion of hegemony. By contrast, post-modernists such as Foucault refute this idea to insist that people are agents and not subjects.

Similarly, in psychology, the term agent is used to emphasise that individuals are rational and goal-directed, meaning that they can make cost-benefit evaluations to achieve an intended end. This conception of agency is relevant in political economics such as in J.S Mill's homo economicus model that suggests human behaviour is always consistent and self-interested. In this context, the notion of agency can be used to explain conflicts of interests between two or more parties and help predict economic behaviour.

Anthropological approaches to agency recognise how individuals are not free-floating agents but rather social beings who are "enmeshed within relations of power, inequality and competition" (Ortner, 2006: 131) and how their decisions are shaped by their position in society, as well as social and cultural understandings, psychosocial dynamics, and emotions (Abu-Lughod 2002).

## Further Resources:

How Sociologists Define Human Agency by Nicki Lisa Cole:  
<https://www.thoughtco.com/agency-definition-3026036>

Agency Entry in the Stanford Encyclopedia of Philosophy:  
<https://plato.stanford.edu/entries/agency/>

## Related Terms:

Hegemony and counter-hegemony; Positionality; Reflexivity

# Capability(ies) Approach

**The capability approach** is a framework of welfare pioneered by Indian economist and philosopher Amartya Sen. For Sen, resources and wellbeing are only valuable in regard to the activities they enable us to undertake (referred to as “doings”) and the person they allow us to be (called “beings”). **Capabilities** are the set of effective freedoms a person can enjoy achieving potential doings and beings.

Building on Sen’s work, philosopher Martha Nussbaum later attempted to create a universal measure of human flourishing that would allow us to think of poverty and deprivation holistically, not only in economic metrics. Nussbaum identified 10 central capabilities:

1. Life, or the right not to die prematurely.
2. Bodily health, relying on appropriate nourishment, shelter and care.
3. Bodily integrity, which refers to safety from assault and freedom of movement.
4. Senses, imagination & thought, or the capacity to think and reason. For Nussbaum, an adequate education is necessary to be truly human.
5. Emotions, such as the freedom to love or grieve unconstrained by fear or intimidation.
6. Practical reason, or one’s ability to engage in moral questions.
7. Affiliation, which comes in two forms: a) the opportunity to participate in social interactions and b) the social basis for self-respect, i.e by not being discriminated against.
8. The right to live in harmony with animals, plants and nature.
9. Play, or be able to enjoy recreational activities.
10. Control over one’s environment, either through a) political engagement to govern one’s own life or b-) the right to own property.

Capabilities are incommensurable, meaning that they are intrinsically valuable and thus cannot be compensated for. Society must therefore provide everyone with the same capabilities: even if individuals do not wish to realise them, the emphasis is on freedom and autonomy for people to achieve their own well-being.

## Further Resources:

Elucidations Podcast: Episode 35: Martha Nussbaum discusses the capabilities approach (2012):  
<https://shows.acast.com/elucidations/episodes/57b49a2f0b5f3f772a76007d>

Tania Burchardt ‘Equality, Capability and Human Rights’ video on LSE Youtube Channel (2015):  
<https://www.youtube.com/watch?v=7zPQiRz3tHc>

## Related Terms:

Epistemic Injustice; Gross Domestic Product

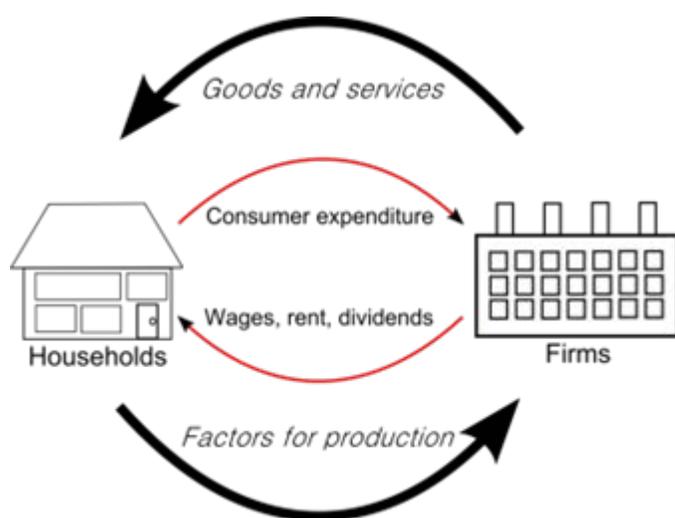
# Circular Flow of Income

**The circular flow of income** is a model used to demonstrate how money, goods, and services move through a national free-market economy. It shows, specifically, how money moves from households to firms in the form of expenditures in exchange for consumer goods/services, and from firms to households in the form of wages for labor production/factory services. More advanced models may also include governments (three-sector diagram), overseas sectors (four-sector diagram), and financial markets (five-sector diagram).

The concept of a circular flow of income was first explained by Richard Cantillon, an 18th century economist. In his work, he identified five types of economic agents: property owners, farmers, entrepreneurs, labourers and artisans. The idea of circular flow was further developed by other economists including Francois Quesnay, Karl Marx, and John Maynard Keynes. In Marxian economics, the circular flow of income model relates to economic reproduction and the cyclical nature of economic processes.

Some economists like Kate Raworth critique the circular flow of income models because both unpaid care work and social inequalities among households are excluded (and therefore invisible) from this representation of the economy. Raworth argues that both care work and social inequalities are central to the way that free-market economies function and to social reproduction more generally. Indeed, care work (which is unwaged and often performed by women) allows workers to go out and work by caring for their needs outside of work. At the same time, social inequalities allow for the exploitation of labour by differentiating who is allowed to do what kind of work (and hence earn a particular wage).

Below is a representation of the two-sector diagram:



Open license: this file is licensed under the Creative Commons by <https://en.wikipedia.org/wiki/User:Irconomics>; <https://creativecommons.org/licenses/by-sa/3.0/>

## Further Resources:

Federal Reserve Bank of St Louis (2015) 'Circular Flow Model', Economic Lowdown Video Series: <https://www.stlouisfed.org/education/economic-lowdown-video-series/episode-6-circular-flow>

Raworth, K (2012) 'Why it is time to vandalize the economic textbooks', Exploring Doughnut Economics Blog: <https://www.kateraworth.com/2012/07/23/why-its-time-to-vandalize-the-economic-textbooks/>

## Related Terms:

Gross Domestic Product; Homo Economicus; Social Reproduction

# Climate Justice

**Climate justice** refers to the fair and equitable distribution of the burden of climate change based on the consideration that those who contributed the least to the problem will suffer the worst impacts. As such, the main feature of the climate justice perspective is that it emphasizes the historical responsibility and continued political inaction of industrialized nations who have exploited resources and extracted fossil fuel with impunity for centuries.

Today, it is estimated that the top 1% of the world's income distribution is responsible for twice the carbon emissions caused by the poorest half of the planet in the last 25 years. Yet the negative impacts are not felt equally, with poorer regions and disadvantaged communities being more vulnerable to disasters and instability. This is also true within countries and societies, as the climate crisis exacerbates existing inequalities faced by marginalised, Indigenous and low-income groups. The acronym MAPA (Most Affected People and Areas) is used in activism and scholarship to refer to groups in precarious situations. Climate justice thus goes hand in hand with social justice as the two denounce the same oppressive structures and power dynamics.

Examples of climate justice in activism are Extinction Rebellion and Fridays for Future, two grassroots movements that pressure nations, governments and polluting companies to take accountability and address the issue.

The issue of climate justice also raises various legal and ethical concerns, especially about displacement and intergenerational equity. In face of inadequate climate change mitigation efforts by public institutions, activists and lawyers have turned to national and international judiciary channels for litigation. In 2019, the Supreme Court of the Netherlands set a historical precedent by ruling that the government had endangered the human rights of Dutch citizens by failing to meet the carbon dioxide emission-reduction goal established by scientists.

## Further Resources:

Upstream Podcast Documentary, The Green Transition Part 1: The Problem with Green Capitalism (2022): <https://www.upstreampodcast.org/greentransitionpt1>

Deborah McGregor (2021) 'An Indigenous peoples' approach to climate justice': <https://www.carbonbrief.org/guest-post-an-indigenous-peoples-approach-to-climate-justice/>

## Related Terms:

Epistemic Injustice; Racial Capitalism; Tax Justice

# Coloniality and decoloniality

**Coloniality** refers to the global organizing structures of Euro-centric power that can be traced back to the colonial period. It holds race as an organizing principle for what is deemed human and legitimate, as it holds Euro-American thought as uniquely universal and scientific (Ndlovu-Gatsheni 2019). Using coloniality as an analytical framework can help us dismantle the idea that colonialism existed as an event that humanity has foregone after the colonial powers left. Coloniality helps us see the remnants of the systems of power established during the colonial period.

Peruvian sociologist Quijano introduced this concept and delineated four key levers of coloniality: control of the economy, authority, gender and sexuality, and knowledge and subjectivity. In this, the socio-economic systems of the West become ingrained into the colonized country's society, relegating previous structures as primitive and inadequate. Modernity is seen as originating solely from the West, reinforcing certain knowledge systems. Knowledge from oppressed populations is excluded from the larger knowledge base, leading to the death of Indigenous languages and cultures.

Decoloniality can be understood as the theory of knowledge and political movement that aims to fight coloniality through a critical analysis of global power dynamics, the politics of knowledge cultivation, and common understandings of humanity. Decoloniality does not aim to replace Western thought with Southern thought but aims to expand the economic and social structures that are seen as valid.

Decoloniality has been used by many different socio-political movements, including the Rhodes Must Fall movement. Cecil Rhodes served as the colonial Prime Minister of the Cape Colony and founded the colonial territory of Rhodesia, now known as Zambia and Zimbabwe. The movement started with protests at the University of Cape Town, where activists successfully removed a statue of Rhodes. The movement spread continues internationally; at Oxford University, activists call for the removal of another Rhodes statue.

## Further Resources:

Rock Ethics Institute (2018) 'Toward Decolonial Feminisms Interviews' Pennsylvania State University:  
<https://www.youtube.com/watch?v=prDX3EfiYqQ>

Alvina Hoffman (2017) 'Interview – Walter D. Mignolo/Part 2: Key Concepts' E-International Relations :  
<https://www.e-ir.info/2017/01/21/interview-walter-mignolopart-2-key-concepts/>

Amit Chaudhuri (2016) 'The Real Meaning of Rhodes Must Fall' The Guardian:  
<https://www.theguardian.com/uk-news/2016/mar/16/the-real-meaning-of-rhodes-must-fall>

## Related Terms:

Epistemic Injustice; Hegemony and counter-hegemony; Racial Capitalism

# Degrowth and post-growth

**Degrowth** is an alternative economic framework that questions the logic of economic growth as a desired outcome of national (and international) economies. Proponents for degrowth argue that:

1. A focus on economic growth fails to consider limited resources and assumes that natural resources are plentiful and regenerating. This leads to continual extractionist models that then contribute to environmental degradation and the climate crisis.
2. A focus on economic growth is blind to economic and social justice as it does not consider distribution of resources across populations (both nationally and internationally). This means that it fails to address social and economic inequality as a means of developing the state.

Instead, advocates for a degrowth or post-growth economy recommend that the health of economies be measured using indicators of social and environmental wellbeing. This means, that for some states, the economy needs to continue to focus on growth to develop jobs and their economies because their economies are still operating within planetary boundaries, and issues of social justice need to be addressed by opportunities, while other states (especially those in the Global North), need to actively degrowth their economies because they are operating beyond planetary boundaries and focus their economies around distribution of wealth across the population along with social welfare schemes.

Key proponents of degrowth and post-growth often position themselves as feminist, ecologist, and decolonial economist. They include scholars such as Frederico Demaria, Corinna Dengler, Jason Hickel, Miriam Lang, and Matthias Schmelzer (among many others).

## Further Resources:

Hickel, J. (2020) 'Degrowth: A Response to Branko Milanovic', Jason Hickel Blog: <https://www.jasonhickel.org/blog/2017/11/19/why-branko-milanovic-is-wrong-about-de-growth>

Dengler, C. & Roxanne VB (2021) 'Episode 21: Corinna Dengler on Feminist Degrowth and a Care-Full Radical Transformation', Go Simone Podcast: <https://soundcloud.com/user-989949112/corinna-dengler-on-feminist-degrowth-and-a-care-full-radical-transformation>

## Related Terms:

Climate Justice; Kuznets Curve; Social Reproduction

# Dispossession

**Dispossession** refers to intentional, unjust process of land grabs, often at the hands of the state or private enterprise. According to Marx, the accumulation of wealth through the privatization of land was necessary for the capitalist class to grow at the expense of the working class. Marx refers to this historical process as primitive accumulation.

Political theorist Nichols highlights the different ways dispossession has been used historically (Nichols 2020). Originating from Europe, dispossession is situated within larger political debates concerning the nature of property. The anarchist saying “Property is Theft!,” determines the problematic aspect of (dis)possession lies in its original theft from the peasant class. In the context of the colonization of the Americas, dispossession became a tool to describe the emergence of racial capitalism. Dispossession was not used to describe possession, as Indigenous understandings of private property differed from those of Europeans. Across the settler-colonial world, lack of cultivation, and therefore perceived lack of ‘civilization’, has been used to dispossess Indigenous peoples (Bhanadar 2018).

This process is ongoing, as exemplified by the many Indigenous land struggles happening in Latin America. The rise of agribusiness in Brazil has led to land grabs of both private and public lands, displacing residents and destroying farming practices. Brazil now has one of the most unequal land ownership structures in the world, with 1.5% of land owners occupying 52.6% of all agricultural lands (Clements & Mançano Fernandes 2013).

Dispossession also occurs in the urban context, as working-class people across the world face the consequences of the predatory housing market. Gentrification can be seen in the changing composition of major cities, where poor people are being priced out, highlighting the flexible nature of dispossession.

## Further Resources:

Amnesty International ‘Israel’s Occupation: 50 Years of Dispossession’:  
<https://www.amnesty.org/en/latest/campaigns/2017/06/israel-occupation-50-years-of-dispossession/>

‘Enclosure on the Grand Scale’ (2012) The Land Magazine:  
<https://www.thelandmagazine.org.uk/articles/enclosure-grand-scale>

Kirsteen Paton and Vicki Cooper (2016). ‘It’s the State, Stupid: 21st Gentrification and State-Led Evictions’ Sociological Research Online:  
[https://oro.open.ac.uk/47082/3/It%27s%20the%20state%20stupid\\_Paton%20and%20Cooper.pdf](https://oro.open.ac.uk/47082/3/It%27s%20the%20state%20stupid_Paton%20and%20Cooper.pdf)

## Related Terms:

Exploitation and expropriation; Neoliberalism; Racial Capitalism

# Epistemic Injustice

**Epistemic injustice** refers to injustices that are related to knowledge. Specifically, these are injustices perpetrated due to either:

- a. A lack of recognition of the knowledge a particular person or group of people hold, or
- b. A lack of recognition of the person (who has knowledge) of being knowledgeable.

Miranda Fricker coined the term and in her 2007 book, *Epistemic Injustice: Power and the Ethics of Knowing*, highlighting the two forms of epistemic justice testimonial (when someone is not trusted or believed) and hermeneutical injustice (when someone - or a group - isn't able to make meaning of their own experience). Fricker argues that both are caused by prejudice. For meta-philosopher Kristy Dotson, epistemic oppression is caused by pernicious ignorance on the part of those in power - who fail to recognize others' knowledge (ignorance), which in turn causes harm (pernicious).

For scholars of de/coloniality, epistemic injustice is central to understanding the role of knowledge in colonial relations, the justification for colonization, and the myth of European exceptionalism. Key thinker of decoloniality Anibal Quijano (2000) identifies how Eurocentric knowledge in the form of modernity is used to maintain and justify political and economic domination while refusing to recognize non-European knowledge systems. In the words of Sabelo Ndlovu-Gatsheni, those that were colonized were (are) denied the 'right to think, theorize, interpret the world, develop their own methodology, and write from where one is located' (2018). This is also echoed in the work of Linda Tuhiwai Smith (2012), when she writes in reference to Indigenous knowledges: 'It appalls us that the west can desire, extract and claim ownership of our ways of knowing, our imaginary, the things we create and produce, and then simultaneously reject the people who created and developed those ideas and seek to deny them further opportunities to be creators of their own culture and nations.'

## Further Resources:

Fricker, M. (August 2014) 'Epistemic Equality?' Keynote Lecture Social Equality Conference, UCT Philosophy, Cape Town, South Africa: <https://www.youtube.com/watch?v=u8zoN6GghXk>

Ndlovu-Gatsheni, S. (December 2014) 'We're trying to invent a future beyond Euro-North American-centric modernity', TV Clasico interview: <https://www.youtube.com/watch?v=ww4dyedIBig>

## Related Terms:

Agency; Coloniality and decoloniality; Pluriverse

# Exploitation and expropriation

**Exploitation** is a term in used by Marx to describe the relationship to waged labour under a capitalist economic system (or any class-based economic system). In capitalism, workers sell their labour for wages. While on the surface this seems to be a fair system, that workers freely enter into wage contracts, Marx argued in fact it was exploitative. Marx claimed that this system was *not* entered into freely – since labour does not own the means of production, they are required to sell their labour to be able to feed themselves. This means that, under capitalism, all wage labour is exploitable because of the advantaged position of capitalist who own the means of production. Therefore, capitalist classes accumulate wealth by exploiting waged labour.

Expropriation, on the other hand, is accumulation of wealth through all other means beyond exploitation (aka waged labour). Nancy Fraser (2022) states that ‘expropriation works by confiscating human capacities and natural resources and conscripting them into the circuits of capitalist expanse.’ This means that human labour that is unpaid is used to maximize capitalist profit along with natural resources that originally are made available freely (or nearly freely), such as water or trees.

Some examples of tools for expropriation include slavery (both historical and current), land grabs and privatization of public land (including enclosing the commons, colonial conquest, and current land grabs by private industry, and even debt (and how debt is used to justify the confiscate resources).

## Further Resources:

Nancy Fraiser (2019) 'Critique of Capitalism' Chapter on Social Reproduction, The New School:  
<https://www.youtube.com/watch?v=mSPR7LIP8NY>

'Expropriation, Exploitation, and the Neoliberal Racial Order' (2018) New Dawn Podcast:  
<https://anchor.fm/new-dawn/episodes/Expropriation--Exploitation--and-the-Neoliberal-Racial-Order-e2keh1>

## Related Terms:

Coloniality and decoloniality; Neoliberalism; Racial Capitalism

# Gross Domestic Product (GDP)

**The Gross Domestic Product (GDP)** is the measure of the market value created through the production of goods and services by a country during a certain period of time, usually a year. As such it is an indicator of a country's economic activity, and it is widely used to compare economies to one another. There are three different ways of calculating the GDP:

1. The Production Approach, or Value-Added Approach, calculates the value added to a product at each stage of production, from which is deducted the costs of goods and services involved in the process (referred to as "intermediate consumption"). For example, the flour used to make bread, the electricity required by the oven and the salary of the baker would not count towards the GDP.
2. The Income Approach measures the GDP as Gross Domestic Income (GDI), or the earnings that individuals and corporations receive through wages, rent, interests on capital, and other forms of profits.
3. Finally, the Expenditure Approach measures household consumption and government spending in purchasers' prices. In other words, it reflects the total expenditure that is used by people to buy things, as an indirect way of measuring production. By conventions, goods that are produced but unsold are accounted for by being considered bought by the producers themselves

In theory, these methods are all equivalent. In practice however, there are important data limitations, so that each may provide slightly different GDPs.

Importantly, the GDP does not constitute a measure of welfare and must therefore be interpreted critically. Some alternative, more comprehensive, measures include the Better Life Index and the Human Development Index, developed by the OECD and the UN respectively.

## Further Resources:

How can governments think beyond GDP? - Paul Anand for the LSE Blog:

<https://blogs.lse.ac.uk/covid19/2020/07/17/how-can-governments-think-beyond-gdp/>

What is GDP, and how are we misusing it? - Jennifer Blanke for the World Economic Forum:

<https://www.weforum.org/agenda/2016/04/what-is-gdp-and-how-are-we-misusing-it/>

## Related Terms:

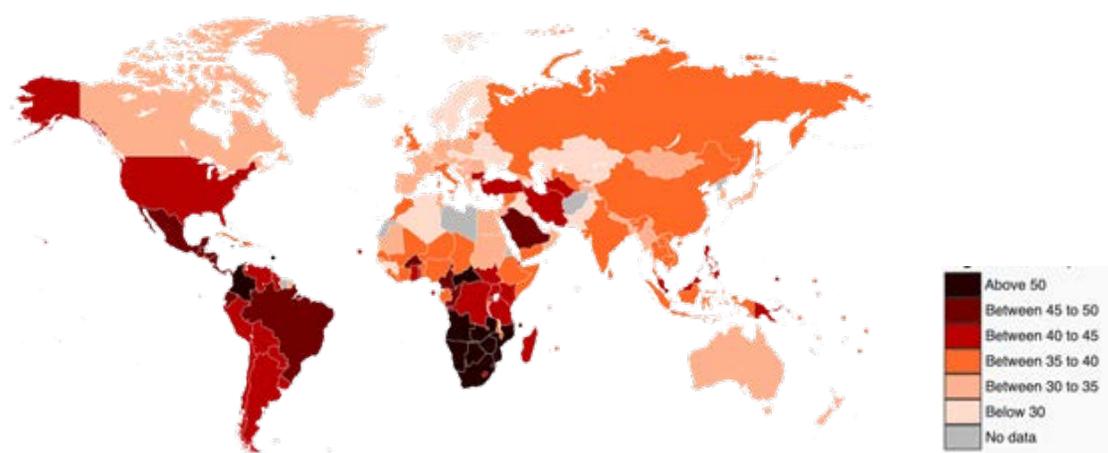
Gini Coefficient

# Gini Coefficient

**The Gini coefficient** is one of the most commonly used measures of inequality in economics. Also sometimes referred to as the Gini index or ratio, it attempts to quantitatively capture the degree of wealth inequality within a nation or group by measuring the statistical dispersion of a given distribution, oftentimes income. The coefficient is scaled from 0 to 1 (or 0% to 100%), where 0 indicates a level of perfect equality (for example, if everyone received the exact same income) and 1 expresses the largest possible discrepancy between parties. This is often illustrated graphically by the Lorenz curve, which offers a helpful visualisation of the gap between the actual share of incomes and a hypothetical line of perfect equality.

The Gini coefficient is a helpful indicator in many regards. Unlike absolute measures, it is independent of a country's size and how wealthy its economy is, which allows for convenient comparisons between countries. On the other hand, it also has important limitations: one of the main drawbacks is that it does not account for changes in the demographic structure of a population, such as baby booms, immigration and age distributions. In addition, the value of the coefficient changes considerably depending on what it measures, such as wages, wealth, income before or after tax, etc. It is therefore crucial to interpret Gini coefficients with caution and in complement of other indicators, as different distributions can yield the same Gini coefficient.

Below is the world map of the GINI coefficients by country, based on World Bank data and other sources ranging from 1990 to 2020.



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deed.en

## Further Resources:

In defense of the Gini Coefficient - Francisco Ferreira for the World Bank:  
<https://blogs.worldbank.org/developmenttalk/defense-gini-coefficient>

Take Gini Coefficients with a grain of salt - Lyaziza Sabyrova in Asian Development Blog:  
<https://blogs.adb.org/index.php/node/2121>

## Related Terms:

Gross Domestic Product

# Governmentality

**Governmentality** refers to the theory of art of government, seen through the ways in which governing bodies present themselves to the public. French historian-philosopher Michel Foucault popularized this term, in an attempt to critically analyze the shifting function of the liberal government.

Foucault defines governmentality in three senses: the total sum of institutions, procedures, analyzes, reflections, calculations, and tactics used by a government; the Western tendency of “government” as we know it and the assumptions underlying this social formation; and the use of legality and security to reinforce the power of the state (Foucault 1978). The practice of governmentality arose in the 16th century, with the development of an administrative regime in the territorial monarchies, the development of statistics, and mercantilism.

Foucault argues that mercantilism was the first sanctioned attempt of governmentality regarding political practices and the knowledge of the state, using the ideological arguments drawn from statistics to increase the power and wealth of the state. Throughout history, governmentality has shifted form, especially in the face of the significant political uprisings from the 17th century on.

Governmentality is a fusion of government and mentality, highlighting the inherently ideological power of this concept. Philosopher Bentham discusses how governmentality naturalizes the choices individuals make: “people, following only their own self-interest, *will do as they ought*” (Scott 1995, pgs. 202-3). Governmentality seeps into all aspects of society, obscuring the structural power of government in individual choices.

In the modern day, we can see governmentality play out in the all-consuming social media platforms. Branding tactics aim to make consumption practices seen rational and individual-driven, obscuring the intense planning organizations undergo in order to optimize business (Clegg 2019). Audiences are left feeling liberated through their personal choices, which ultimately serve the interests of those in power as consumers act ‘as they ought.’

## Further Resources:

Sokhi-Bulley, Bal. (2014) ‘Governmentality: Notes on the Thought of Michel Foucault’ Critical Legal Thinking: <https://criticallegalthinking.com/2014/12/02/governmentality-notes-thought-michel-foucault/>

The Open University. (2014) Governmentality - International Relations (6/7) Youtube: <https://www.youtube.com/watch?v=UBpI7PwjzU>

## Related Terms:

Agency; Homo Economicus; Neoliberalism

# Hegemony and counter-hegemony

**Hegemony** refers to the form of control the dominant classes play in society, through the naturalization of their ideology. In this, hegemony does not rely solely on physical means of repression; it depends on the public's acceptance of the dominant ideology in the mission of constructing and reconstructing the overarching socio-political system.

Hegemony is not directly connected to a specific ideology, but as we live under capitalism, it is essential to reflect upon the hegemony of capital. An example of this form of hegemony is the diffusion of neoliberal views in society. Neoliberalism's success is seen with the internalization of individualistic notions of freedom and success by a large part of society, making it easier for politicians to implement neoliberal policies like privatization and austerity. Although the implementation of policy does not necessitate the populous' acceptance of neoliberalism, this manufactured consent facilitates the process.

Italian Marxist philosopher Antonio Gramsci theorized both hegemony and counter hegemony during his imprisonment by the fascist state in 1926. He aimed to equip the left with another tool to describe the differences in political regimes, as the term dictatorship was used in such a broad way that the distinction between capitalist and fascist states was obscured.

Counter-hegemony refers to challenging the dominant, status quo ideas (i.e., the hegemonic) through advancing alternatives. This can involve practices of resistance as well as ideological production coming from the oppressed class that aims to destroy the present hegemonic structure with the mission of total liberation. It faces two distinct audiences, the members of its own class who have fallen victim to hegemonic ideology and those belonging to other social classes who support the cause of liberation (Aronowitz, 2015, 96).

## Further Resources:

William K. Carroll (2006) 'Hegemony, Counter-Hegemony, and Anti-Hegemony' Keynote Address to the Annual Meeting of the Society for Socialist Studies, York University:  
<https://socialiststudies.com/index.php/sss/article/view/23790/17675>

'Gramsci and Hegemony' Powercube: Understanding the Power of Social Change:  
<https://www.powercube.net/other-forms-of-power/gramsci-and-hegemony/>

Michalinos Zembylas (2013) 'Revisiting the Gramscian Legacy on Counter-Hegemony, the Subaltern and Affectivity', Critical Studies in Teaching and Learning:  
<https://www.ajol.info/index.php/cristal/article/view/125973/115505>

## Related Terms:

Agency; Governmentality; Subaltern

# Homo Economicus

**Homo economicus**, literally meaning ‘economic man’, is a term used to describe the characteristics of a theoretical understanding of how a rational human operates in the world. It is used often in rational choice theory which is a theory that attempts to set up a framework for how individuals think and act in relation to the economy.

The characteristics that make up homo economicus draw on work by John Stuart Mills and Adam Smith (though other economists have contributed to this abstract construct of what is the nature of man). Key characteristics of homo economicus include:

- Homo economicus is motivated by profits, and he always makes decisions that prioritize his own profits. This means that he will sell things at the highest price that the market will allow, and as a consumer, he will also be motivated by utility (and not impulses).
- Homo economicus is always rational. This means that he ensures that decisions are not motivated by emotions.
- Homo economicus operates in his own self-interest.
- Homo economicus is consistent.

Foucault (1979 / 2008) links the concept of homo economicus directly to neoliberal ideology. He claims homo economicus is an entrepreneur, where he is ‘himself his own capital, being for himself his own producer, and being for himself the source of earnings,’ (226). In this, Foucault is claiming that the theory of homo economicus makes man a portfolio that he must invest in in order to maximize his own profits. In doing so, every aspect of his life – personal, educational, as well as professional – are guided by market logics and investment in himself.

## Further Resources:

'Debunking the Myth of Homo economicus' (2021) Upstream Podcast:  
<https://www.upstreampodcast.org/homoeconomicus>

## Related Terms:

Governmentality; Neoliberalism

# Intersectionality

**Intersectionality** is a term coined by Kimberlé Crenshaw describes how identities of race and gender shape experiences of subordination – that ‘the single axis framework’ (1989, 137-138) is not enough to understand multiple forms of discrimination.

While Crenshaw coined the term, she was not the first to engage with the concept. Others who engaged with the concept of intersectionality before Crenshaw include the Combahee Women’s Collective (1977), bell hooks (1981), Audre Lorde (1983), and Gloria Anzaldúa (1987). For example, in *The Masters Tools Will Never Dismantle the Master’s House*, Audre Lorde critiques the exclusion of Black and ‘Third World’ women and lesbian women from feminist theories. She claims that it is sign of ‘academic arrogance’ that the multiple, different voices of women are not included – especially ‘poor women, Black and Third World women, and lesbians’, and that the act of excluding the input of such women means that such feminism continues to use ‘tools of the racist patriarchy’ to ‘examined the fruits of that same patriarchy’ (1983, 7).

Collins (1990) further develops the concept of intersectionality in her book *Black Feminist Thought: Knowledge, Consciousness, and the Politics of Empowerment* by introducing the ‘matrix of domination.’ This matrix outlines the multiple ways in which people may experience discrimination, including race, class, gender, and sexuality. This domination can be structural, disciplinary, hegemonic, and interpersonal. Intersectionality and the matrix of domination aim to make multiple social and economic inequalities visible by untangling the relationships between knowledge, empowerment, and power.

## Further Resources:

Combahee River Collective Statement:

<https://combaheerivercollective.weebly.com/the-combahee-river-collective-statement.html>

The Urgency of Intersectionality: <https://www.youtube.com/watch?v=akOe5-UsQ2o>

## Related Terms:

Agency; Positionality; Racial Capitalism

# Kuznets Curve

**The Kuznets curve** is a hypothesis advanced by economist Simon Kuznets claiming that with economic growth in market-based economies, income inequality first increases and then decreases after a certain level of economic development, following an inverse-U curve. Three main stages are present in this hypothesis:

1. As the economy grows, the majority of the population has little per capita income;
2. As a select group of society accumulates masses of capital, income inequality hits its peak as competition creates low wages;
3. The rise of a professional middle class, as well as the development of new technologies, allows for income to be distributed more equitably.

Kuznets developed this hypothesis in the 1960s/70s, drawing upon the development paths of Western countries like the United States and Britain, whose development paths until then followed the Kuznets curve. This conceptualization can be understood as a subsection of trickle-down economics, wherein the development of the economy firstly benefits the richest individuals in the society, and over time, the rest of the society benefits (to a much lesser degree).

Much has changed since, especially with the United States serving as a major contradictory case. Although the US is one of the world's richest countries, inequality has been on the rise in recent years, disproving the argument at the core of the Kuznets curve. Economist Thomas Piketty has played a central role in the critique of the Kuznets curve. His research on the development of several Western countries has shown that the decreasing inequality seen in the 1960s and 1970s was not related to a trickling down of wealth, but instead related to specific capital shocks and the implementation of progressive taxation. Piketty argues that high wealth inequality is not necessary for growth, and it can actually have a harmful impact on the futures of developing countries.

## Further Resources:

Essential Economics: Kuznets Curve by Mike Moffett:  
<https://www.thoughtco.com/kuznets-curve-in-economics-1146122>

The end of the Kuznets Curve: Explaining Piketty's argument by Sisira Jayasuriya:  
<https://impact.monash.edu/economy/the-end-of-the-kuznets-curve-explaining-pikettrys-argument/>

## Related Terms:

Neoliberalism

# Neoliberalism

**Neoliberalism** has variously been described as an ideology (Hardt and Negri, 2001), a form of governmentality (Brown, 2015), or a political project (Harvey, 2007). Despite the competing definitions, most authors writing about neoliberalism would probably agree that at a minimum, neoliberalism entails a focus on individual responsibility rather than collective meeting of needs and policies that are characterised by a hostility to the public realm representing a combination of anti-welfarism and anti-statism. Some policy examples of neoliberalism include financial and trade liberalism, privatization of state owned enterprises, and the deregulation of the market (Steger and Roy 2010) as well as austerity measures and cutting public spending on welfare.

Liberalism vs. neoliberalism: Two academics who are central to the creation of neoliberalism are Friedrich Hayek and Milton Friedman. Hayek and Friedman created the 'Chicago School of Economics', an ideological school of thought that pushed for the removal of any regulations from capitalism, which they saw as artificial imperfections that hindered the free market from working efficiently (Hickel 2017). The Chicago School's ideological work has been used as a means for countries like the United States to intervene in Global South countries, using the logic of neoliberalism as an imperialist tool. One such example is the American government's Project Chile, where the US trained 100 Chilean students in neoliberal theory in an attempt to destroy the presence of left-wing ideology under socialist president Salvador Allende.

Globally, neoliberal ideas became influential in the 1980s. In the Global North, US President Ronald Reagan and UK Prime Minister Margaret Thatcher, advocated for the adoption of neoliberal policies including privatization of formerly state-owned enterprises, deregulation, and the rolling back of the State through the implementation of neoliberal reforms. In the Global South, neoliberal ideas influenced the policies of intergovernmental organisations such as the World Bank and the International Monetary Fund (IMF). In the 1980s, the IMF and World Bank promoted structural adjustment programs, wherein loans given to developing countries, were contingent upon governments' adherence to neoliberal policies, leading to heavy cuts in social services and ultimately increasing poverty and inequality.

## Further Resources:

'Naomi Klein on Neoliberalism' Big Think:  
<https://bigthink.com/videos/naomi-klein-on-global-neoliberalism/>

'Episode 122: Interview with Professor Wendy Brown, author In the Ruins of Neoliberalism: The Rise of Anti-Democratic politics in the West' (2021) The Sustainability Agenda Podcast:  
<https://www.thesustainabilityagenda.com/podcast/episode-122-interview-with-professor-wendy-brown-author-in-the-ruins-of-neoliberalism-the-rise-of-antidemocratic-politics-in-the-west/>

## Related Terms:

Exploitation and expropriation; Homo Economicus

# Performativity

**Performativity** is a broadly-used concept in the social sciences and humanities, from anthropology, economics, philosophy, queer and gender studies and more. Originally, the notion was developed by language philosopher J.L Austin to describe the way that verbal communication can “act” in the same way an action would. For example, making a promise or pronouncing a verdict perform an action through language. Post-structuralist figure Jacques Derrida then built on this work to stress that any text or speech is unique because of the specific effects it performs in a particular situation. In other words, there is no real delimitation between a speech act and its context.

Today however, the way that we understand performativity is not necessarily tied to the use of language. In the 90s, gender theorist Judith Butler expanded the term to describe the social construction of gender, which is acted through both speech and non-verbal communication. As social norms shape cultural practices, gender becomes an act, rehearsed like a script to fit into the appropriate scenario. This view is a reversal of the more traditional approach to social identity: one’s words and behaviours are not so much a reflection of their identity as they are a repeated performance of externally-influenced social roles to be. As such, the individual is an actor that *puts on* a role, as opposed to *embodying* the role. In Butler's own words: “The subjects regulated by such structures are, by virtue of being subjected to them, formed, defined, and reproduced in accordance with the requirements of those structures” (Gender Trouble). Conversely, failure to perform the adequate social role is publicly and regulated and sanctioned.

Although disputed on several theoretical fronts, Butlerian theories of performativity provide a thought-provoking interpretation of the way that structure and **agency** interact to shape social norms and behaviours.

## Further Resources:

Judith Bulter: Your behaviour creates your gender: <https://www.youtube.com/watch?v=Bo7o2LYATDc>

## Related Terms:

Agency; Positionality; Reflexivity

# Pigou-Dalton Principle

**The Pigou-Dalton Principle**, in essence, is based on the premise that a redistributive scheme from the rich to the poor (for example in terms of income) is only desirable as long as it does not lead the rich to be in a worse-off situation than the poor started in. This is therefore a utilitarian principle, that prioritises to maximise the total sum of satisfaction. In economics, this feature is known as “non-rank-switching”, considering that the two parties remain in their respective relative position even after retribution (the rich remain richer than the poor even as the poor has more resources). In addition, the Pigou-Dalton Principle also states that the transfer should be “non-leaky”, meaning that it should offer the one who started out with less exactly as much as the loss suffered by the better-off. In other words, so long as the *total* allocation of goods and amount of well-being remain unchanged, a less unequal distribution between two or more parties is always preferred.

The principle was intended by its coiners, Arthur Cecil Pigou and Hugh Dalton, as a condition on social **welfare** functions to encourage equitable transfers of goods. Based on this guiding rule, it becomes possible to compare two models of welfare and offers a criterion to assess which of the two is more or less just. The best course of action is an allocation of goods that reduces inequality (non-rank-switching) but does not lose any value in the process (non-leaky).

## Further Resources:

How Do We Measure Inequality? | Lecture 2 | Inequality 101 with Branko Milanovic & Arjun Jayadev, New Economic Thinking: <https://www.youtube.com/watch?v=juSl1KpshZQ&t=754s>

## Related Terms:

Neoliberalism; Welfare Regimes

# Pluriverse

**The pluriverse** is a way of knowing and acting in the world that moves beyond a single universal ‘correct’ way to act. Universal knowledge works from the assumption that there is a single knowable external truth. However, the pluriverse is based on the idea that there are many ways forward. Perhaps the most succinct way of defining it offered by the Zapatistas, in their *Fourth Declaration of the Lacandona Jungle* (1996) as ‘a world in many worlds’. Each of these worlds has:

- Own ways of relating between different beings, human and nonhuman;
- Own languages mediating relations between humans and with nonhumans;
- Own knowledges that are produced through these relations. The pluriverse is central to concepts of decoloniality – as a way of knowing that decentres the universal of

Western European philosophy and allows for local histories and contexts to come up with their own ways of knowing that can make meaning of the world more widely. For Maria Lugones (2007), the pluriverse offers a ‘possibility of new geopolitics of knowledge’ because it allows each local to make connects between themselves and the wider world – and allows each way of knowing to be in conversation and linked to each other.

While the pluriverse is about each local being able to theorize and understand the world, it is also a global project because it allows different people with different histories to understand the global without *having* to use European theories, meaning each local has the ability to make it own knowledge system to theorize *beyond* their locale. Because of this, the pluriverse offers a way of recognizing the voices of people who speak about / to their own experiences, their own knowledges, and their own understandings of the world. It recognizes the power communities and people have to give and enact their own answers as a collective. And the pluriverse makes visible how different knowledges can shift and change wider understandings of global issues.

## Further Resources:

Ejercito Zapatista Liberacion Nacional (1996) ‘Fourth Declaration of the Lacandona Jungle,’ Zapatista Encuentro: Documents from the 1996 Encounter for Humanity and Against Neoliberalism:  
<https://schoolsforchiapas.org/library/fourth-declaration-lacandona-jungle/>

Mkwesha, F. (2021) Pluriverse. University of Helsinki:  
<https://www.youtube.com/watch?v=iEqgCD6vHfo>

## Related Terms:

Coloniality and decoloniality; Epistemic Injustice; Racial Capitalism

# Positionality

**Positionality** is the conscious awareness of one's own socioeconomic status and how they shape our understanding of the world. The term was first coined by feminist thinker Linda Alcoff in 1988 to argue that the need for the analytical category of 'women' is justified by a shared position in a patriarchal society - as opposed to fixed characteristics. This perspective is based on the *foucauldian* assumption that we are all products of social influences, so that our identities and subsequent knowledge of the world are relational and contextual. British cultural theorist Stuart Hall goes as far as to state:

*“there is no enunciation without positionality. You have to position yourself somewhere in order to say anything at all”.*

As such, there is no such thing as objective knowledge, nor a “neutral” perspective in research. Therefore, positionality related to the ways that knowledge is *produced*. In practice, it is used as a methodological tool for social researchers to recognize the situated nature of knowledge by recentering themselves, the knower, at the heart of knowledge production. In academic papers, this introspection is often addressed in the introduction in the shape of a positionality statement in which the author contextualises their own background. In research, positionality is thus relevant to the “insider” versus “outsider” debate and its ethical implications.

While the term originated in feminist studies and is now mainly used in qualitative research and fieldwork, it is also relevant to seemingly more “objective” disciplines. From the nature of the questions being investigated and the way that data is collected to the interpretation of findings and implications, social identities affect various aspects of the research process. Thinking about positionality is a valuable tool to demonstrate reflexivity and transparency while remaining critical of potential biases.

## Further Resources:

James Lindsay (2020) 'Position/Positionality' New Discourses:  
<https://newdiscourses.com/tftw-position-positionality/>

Nicole Brown 'Reflexivity and Positionality in Social Sciences Research' Social Research Association Blog: <https://the-sra.org.uk/SRA/Blog/ReflexivityandPositionalityinSocialSciencesResearch.aspx>

## Related Terms:

Agency; Performativity; Reflexivity

# Prefigurative Politics

**Prefigurative politics** refers to an anarchist, horizontal and egalitarian set of practices of organising based on direct democracy (Graeber 2002). Although prefigurative politics is a political strategy that several political movements have used throughout history, social scientist Carl Boggs put a name to this concept in 1977. He coined the term prefiguration, defining it as ‘the embodiment, within the ongoing political practice of a movement, of those forms of social relations, decision-making, culture, and human experience that are the ultimate goal’ (1977, p. 100)

Boggs (1977) highlights three values inherent to prefigurative politics:

1. Deep consciousness of potentially reproducing hierarchical authority relations within the socialist movement
2. Apprehension towards centralized political organizations like political parties and trade unions as they may reproduce oppressive power relations
3. Small-scale democratic organizing structures

Scholars have discussed how in contemporary social movements adopt prefigurative politics in their processes of organising and view these as central to and inextricably linked to their goals. In other words, changes at the level of society are seen as interconnected to changes in the individual and movement. As Maeckelbergh argues, ‘prefiguration is something people do’, it is not ‘a theory of social change that first analyses the current political landscape, develops an alternative model in the form of a predetermined goal, then sets out a five year plan for changing the existing landscape into that predetermined goal’ (Maeckelbergh, 2011, p. 3).

Although they do not identify clearly with a specific political ideology, the Zapatistas in Mexico have used prefigurative politics in their political mission. The political group’s 1994 uprising brought together peasants, Indigenous people, and other marginalized groups to fight the growing neoliberalism with the implementation of the North American Free Trade Agreement (NAFTA) (Fains, 2022). Their strategy did not aim to address government or formal political parties, but instead focused on establishing autonomous zones across the state of Chiapas, where they now hold influence in shaping state and school policy.

In 2011, we saw the emergence of protest movements in around the globe, including in countries like Egypt, Tunisia, Greece, Spain, and the United States (among many more). Although all of these movements had different sparking points, they all aimed for democracy and adopted prefigurative politics as a core organising strategy (Glasius & Pleyers, 2013).

## Further Resources:

Raekstad, Paul and Eivind, Dahl. ( 2020) What is Prefigurative Politics? The Anarchist Library: <https://theanarchistlibrary.org/library/paul-raekstad-and-eivind-dahl-prefigurative-politics>

Gradin, Sofa. (2021). Prefigurative Politics and Social Transformation. Department of Politics & International Affairs, Furman University: <https://www.youtube.com/watch?v=4nH6i1j7AF8>

## Related Terms:

Agency; Hegemony and counter-hegemony; Subaltern

# Racial Capitalism

**Racial capitalism** is a way of understanding how capitalism extracts labour and value across different racialised bodies. It was originally used by South African anti-apartheid activists to understand how racism played out in the apartheid regime (Kundani, 2020).

Cedric Robinson, in *Black Marxism: The Making of the Black Radical Tradition*, then used the term to understand how European racial logic (which predating colonialism but became global during colonialism) serves to justify the accumulation of wealth (through violence), dispossession of people from land, and the exploitation of labour inherent to capitalism. Racial capitalism is also a critique of Marx. Marx claimed that, as capitalism matured, class would be the main way in which all labour organised (not racialised). Robinson argued that capitalism does not liberate those that are racialised; instead, race continues to be a means of determining which bodies are of value, and which bodies therefore do specific kinds of work.

In *Rethinking Racial Capitalism: Questions of Reproduction and Survival*, Gargi Bhattacharyya offers ten theses on racial capitalism - the first one which states that 'racial capitalism is a way of understanding the role of racism in enabling key moments of capitalist development' (p. ix). Like Robinson, Bhattacharyya is not arguing capitalism was intentionally made to be racist. Racial capitalism offers a lens in which to understand how racialisation has interacted with different forms of capitalism. It is a way of understanding how race and class operate together in capitalist systems.

Racial capitalism can be used to understand (this is a non-exhaustive list):

- How structural adjustment in the 1980-90s was imposed on predominantly former colonised countries to force their economies to open to 'free trade' while privatising public services;
- How foreclosures and the 2008 debt crisis unevenly affected Black and Latinx people in the USA;
- How racially minoritized people from the Global South face different visa regimes than those from the Global North.

## Further Resources:

Kelly, Robin D.G. (2017) 'What did Cedric Robinson Mean by Racial Capitalism?' Boston Review: <https://www.bostonreview.net/articles/robin-d-g-kelley-introduction-race-capitalism-justice/>

Al Bulushi, Yousuf (2020) 'On Black Marxism, Racial Capitalism and World Systems Theory' A Correction: A podcast: <https://www.acorrectionpodcast.com/phonyeconomy/6ymabn5xrc5wjmrwrlanbb53sglwba>

## Related Terms:

Dispossession; Exploitation and expropriation; Neoliberalism

# Reflexivity

**Reflexivity** is a praxis (theory and action) used by researchers and practitioners as a means of questioning their own assumptions about who they are, what they do, and the people they work with, drawing on their own positionality and on the power relations around that positionality. Specifically, reflexivity as a praxis means that researchers and practitioners question their assumptions in light of the context they come from (and the context in which they are operating); the power relations between themselves, the people they work with, and the wider world; and in light of different, competing values and embodied realities. Embodied realities mean the way in which different (gendered, racialised, classed, etc) bodies are expected to move and behave in the world.

Archer (2007) describes reflexivity as an internal dialogue where researchers and practitioners not only reflect on action and what they could do differently, but where they actively consider structures in society, individual agency, and relationships between people. Therefore, reflexivity is practice that requires practitioners and researchers to question their assumptions about 1) *where* their work is located and how does that context shift thinking, 2) *how* their own power *in relation to* those they are working with shifts and influences how that action is perceived and received, and 3) the agency that those they are working with hold *regardless* of the practitioners' desires or intentions.

## Further Resources:

Michael Hammons and Jerry Wellington (2014) 'Reflexivity' Research Methods: The Key Concepts available at the University of Warwick's Education Studies:  
<https://warwick.ac.uk/fac/soc/ces/research/current/socialtheory/maps/reflexivity/>

'Episode 6-Reflexivity in Action Research with Dr. Lisa Starr' (2020) The Action Research Podcast: <https://the-action-research-pod.captivate.fm/episode/episode-6-reflexivity-in-action-research-with-dr-lisa-starr>

## Related Terms:

Agency; Performativity; Positionality

# Social Mobility

**Social mobility** is the intergenerational shift across or within socioeconomic strata or classes – it is usually associated with *upward* mobility, though movement can happen up *and* down the socioeconomic strata. The UK Social Mobility Commission defines it as the ‘link between a person’s occupation or income and the occupation or income of their parents. Where there is a strong link, there is a lower level of social mobility. Where there is a weak link, there is a higher level of social mobility.’

Key to understanding the possibilities for social mobility are Bourdieu’s (1986) concepts of social and cultural capital. Social capital refers to acquaintances and networks that a person may have access to that, in the case of social mobility, could facilitate the possibilities to have a different occupation or income from their parents. Networks that a parent or an individual has access to can facilitate introductions to individuals in different fields and increase the possibility for social mobility, just as lack of access can hinder mobility. Cultural capital (such as education, ways of speaking, ways of dress, etc) operates in similar ways. Cultural capital is a signifier that can either constrain or enable social mobility.

Friedman & Laurison (2020) suggests that there needs to be a more critical examination of social mobility around assumptions of merit of elite jobs. Instead, a way of addressing issues of social mobility, which often revolve around assimilating particular socioeconomic classes into the cultures of elite classes, he argues that governments should focus instead on closing class pay gap.

## Further Resources:

Sam Friedman (2022) 'How Do We Break the Class Ceiling' LSE YouTube Channel:  
[https://www.youtube.com/watch?v=SyG\\_unix4vk](https://www.youtube.com/watch?v=SyG_unix4vk)

'Andy Haldane Talks about Social Mobility with Sam Friedman' (2021) Bank of England Podcast:  
<https://www.bankofengland.co.uk/events/2021/september/social-mobility-podcast-with-sam-friedman>

## Related Terms:

Social Reproduction; Welfare Regimes

# Social Reproduction

**Social reproduction** is an umbrella term encompassing all practices necessary to the maintenance of social relations, structures and systems. For Bourdieu, the main feature of social and cultural reproduction is that it cultivates/renews classed hierarchies: as economic, social, human and cultural capital is being passed down from one generation to the next, different social classes emerge and sustain existing patterns of inequality. In this context, the topic of education and concepts like the habitus (the way that one's ingrained habits and predispositions realises/unfolds in various social situations) are central to understanding social relations.

Importantly, the term social reproduction can also refer to the related but distinct notion of reproductive labour, which focuses more specifically on unwaged activities such as household chores and children and elderly care. For Marxist feminist Tithi Bhattacharya, reproductive labour and productive labour (which produces commodities) are two sides of the capitalist coin. If labour produces value, what produces labour itself? Traditionally, reproductive labour is performed by women and severely undervalued, as exemplified by the "1.5 earner" model in which the man is the primary earner of the heteronormative nuclear family, while women's employment is only secondary to their family obligations. This assumption has serious/damaging consequences in terms of gender equality, as it disadvantages women in the labour market. For example, they are often forced to make limiting career choices to conciliate their professional life with responsibilities at home. A related phenomenon is known as the "second shift" for working women, who must perform housework on top of their waged work (Hochschild, 1989). Sociologists have even started to speak of a "child penalty" to refer to the long-term consequences that having a child has on a woman's career trajectory, even long after giving birth.

## Further Resources:

Susan Ferguson 'Social Reproduction: What's the Big Idea' Pluto Press Blog:  
<https://www.plutobooks.com/blog/social-reproduction-theory-ferguson/>

Tithi Bhattacharya (2017) 'What is Social Reproduction Theory' Pluto Press YouTube Channel:  
<https://www.youtube.com/watch?v=Uur-pMk7XjY>

## Related Terms:

Agency; Neoliberalism; Performativity

# Subaltern

**Subaltern** refers to the sum of social classes that are economically, socially and politically disadvantaged as a consequence of the class system upheld by the hegemonic classes. This exclusion goes beyond material differences, as the subaltern are excluded from historical narratives as their histories are seen as insignificant. Italian Marxist-philosopher Antonio Gramsci conceptualized this term while imprisoned by fascist forces. Gramsci (1926) argues that subaltern classes must form a state in their fight against hegemony.

Subalternity refers to the condition of subordination faced by those in the subaltern, which is underlined by a significant presence of structural violence (El Karouni, 2022). The violence is multifaceted and dependent on the intersection of oppression faced by members of the subaltern, which is to say, there exists variance within the position of subalternity. Under patriarchal society, women hold a subaltern position as systems like the legal system often disregard, or even further perpetuated, violence towards women (El Karouni, 2022).

The term has been expanded and now exists as part of the academic sub-discipline, Subaltern Studies. In 1982, a group of South Asian historians came together with the aim of studying the history of power from the perspective of the subaltern, understanding the people as actors of social change. Gayatri Chakravorty Spivak's 'Can the Subaltern Speak?' serves to highlight the socio-historical reasons the subaltern classes, specifically in India, have been unable to hold significant socio-political power. The field has now expanded past the region of South Asia, as the framework of subaltern is applied to many disciplines.

## Further Resources:

Piermarco Piu 'Subalternity' Global Social Theory:  
<https://globalsocialtheory.org/concepts/subalternity/>

David Ludden (2001) 'Introduction: A Brief History of Subalternity' in Reading Subaltern Studies available via University of Pennsylvania:  
[https://www.sas.upenn.edu/~dludden/ReadingSS\\_INTRO.pdf](https://www.sas.upenn.edu/~dludden/ReadingSS_INTRO.pdf)

## Related Terms:

Agency; Epistemic Injustice; Hegemony and counter-hegemony

# Tax Justice

**Tax justice** refers to both an ideology and a rising movement that calls for a progressive tax strategy, where the richest members of society and multinational corporations contribute to the public good. This movement came out of the many years of the richest individuals and organizations making billions from globalization, while inequality becomes more and more significant globally.

Tax justice also aims to prevent the wealthy from hoarding practices such as tax avoidance, as  $\frac{1}{3}$  of total global assets are currently held in un-taxable offshore bank accounts (Kohonen and Mestrum 2008). The impact of practices like tax avoidance disproportionately impacts Global South countries, as 30% of Africa's financial wealth is held outside of the continent, as contrasted to 10% of European financial wealth being held externally (Hearson, 2018).

The tax justice movement does not only aim to make domestic policy changes, but also directs their activism to an international audience. In 2019, an international coalition of government and non-governmental organizations called for a UN Convention on Tax, aiming to create an international taxation body and tackle pre-existing tax inequalities, both within and between countries (Ryding, 2022). This call is especially relevant given the pressure many Global South nations, like the Cayman Islands and the British Virgin Islands, have to continue in their role as tax havens, as their economies heavily depend on this market.

A major player in the world of tax justice is the UK based advocacy organization Tax Justice UK. The organization aims to replace the previous dominant global economic logic under the Washington Consensus with a more egalitarian model referred to as the "Tax Justice Consensus." An important outspur from Tax Justice is the Global South based coalition Global Alliance for Tax Justice, which mobilizes both nationally and internationally.

## Further Resources:

The Global Alliance for Tax Justice Website: <https://globaltaxjustice.org>

'Uncommon Wealth and the 'boomerang effect' (2022) The Taxcast Podcast:  
<https://taxjustice.net/2022/11/18/uncommon-wealth-and-the-boomerang-effect-the-tax-justice-network-podcast-the-taxcast/>

## Related Terms:

Hegemony and counter-hegemony; Wealth Inequality; Welfare Regimes

# Wealth Inequality

**Wealth inequality** is a way of understanding economic inequalities that move beyond income inequalities to consider the disparate amounts of wealth held by different members of society. Income inequality looks specifically at the difference of income across a population – which includes wages / salary and benefits. However, wealth looks at other assets including housing, savings, investments, private pensions, and other forms of wealth that move beyond income.

Pfeffer and Waitkus demonstrate how wealth inequality is distributed differently than income inequality. More of the world's wealth is concentrated in the hands of a small group of elites compared to income concentration. Therefore, by focusing on studying wealth instead of income, economic inequalities become much more visible. Wealth inequality is a problem because 1) it is extreme, 2) it accumulates overtime (through investments and inheritance), 3) it generates further incomes (for example – through rent in the case of housing), and 4) it remains in the hands of the elite through inheritance.

Zucman's work shows how Europe remains the centre of wealth accumulation which originated in its historical colonial empire, where they plundered wealth from its colonies and funnels the wealth to Europe. He also demonstrates how off-shore tax havens now serve these wealthy elite by ensuring that the wealth remains within those families.

One possible way of addressing wealth inequality is by introducing a wealth tax. Advani, Chamberlain, and Summer propose this for the UK in their work *A Wealth Tax for the UK*, which would be a one-off tax on wealth assets of 1% over five years at a threshold of £500,000. In the UK, this would generate £260 billion in public revenue. Others have also proposed wealth taxes in the United States, France, and Germany.

## Further Resources:

'Facts: Wealth Inequality' Inequality.org: <https://inequality.org/facts/wealth-inequality/>

The Wealth Tax Commission Website: <https://www.ukwealth.tax/>

## Related Terms:

Neoliberalism; Tax Justice

# Welfare Regimes

**Welfare regime** is a system implemented by the state to protect the well-being of its citizens, especially those with the greatest financial or social needs. Welfare measures can take many forms, such as healthcare systems, pensions, and public services, which are usually paid for by taxes. Danish political theorist Gøsta Esping-Andersen developed a classification of contemporary Western states. Three models of welfare capitalist states have been identified: liberal, conservative, and social democratic welfare regimes.

- **Liberal:** in liberal regimes, found in most Anglo-Saxons countries, the state only provides minimal assistance - which is itself based on strict means-tested entitlement criteria. The emphasis is placed on individual self-reliance, so that recipients of state welfare are often stigmatised. Market schemes are on the other hand encouraged, and even sometimes subsidised by the state.
- **Conservative:** conservative regimes are typically based on traditional family values, and as such offer family-based assistance: benefits usually encourage motherhood, and are only accessible once families are no longer able to support themselves. Social insurance is prioritised over *assistance*. This model is found in Germany, France, and Japan, for example.
- **Social Democratic:** finally, social democratic states such as the Netherlands and Sweden combine a high degree of de-commodification of welfare services and universalism, such that people do not rely on the market for their livelihood. This represents a commitment to minimising social problems before they arise, with the state taking direct responsibility for caring for the elderly, children, and those who are most deprived.

The Three Worlds thesis has been criticised for being too broad, descriptive rather than explanatory, and almost entirely focused on Western countries in the Global North. In addition, Jane Lewis also criticises this typology as being gender-blind, which is an important shortcoming when we consider that the relation between paid work and welfare relies on the role of women in social reproduction. Scholars have examined welfare regimes and social policy in the context of low-income countries and sought to develop the classification of welfare regime types in non-Western countries. From the perspective of inequalities, it is important to examine how different welfare regimes address, tackle, and in some instances, reinforce or reproduce inequalities.

## Further Resources:

John Hills (2020) 'Scroungers versus Strivers: the Myth of the Welfare State' LSE iQ Podcast:  
<https://www.lse.ac.uk/lse-player?id=e9ad0ecb-c5ff-4134-852d-4540d4b41e7a>

## Related Terms:

Governmentality; Homo Economicus; Neoliberalism; Social Reproduction

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