

# The Age of Inequality: Intersecting Inequalities and Power

When poverty intersects with inequalities associated with gender, race, ethnicity, caste, age, sexual orientation, migrant or refugee status, location or other markers of group identity, it creates particularly oppressive and protracted forms of disadvantage that impede people from developing their capabilities and contributing fully to society. Addressing these inequalities is not only a question of social justice, but also a key condition for achieving more sustainable development outcomes. Inequality has adverse impacts on growth, macroeconomic stability, poverty reduction, health, nutrition and educational indicators, social protection and employment, gender equality, human rights and democratic governance. At the top of the income and wealth pyramid, economic, social, environmental and political privileges accumulate, building the foundation of elite power that often opposes transformative change toward greater social, climate and economic justice. The Covid-19 pandemic has amplified pre-existing inequalities, but also helped to expose the extreme state of fracture of our world, pushing forward a consensus on the need to change the system that led us into the crisis.

## 1. Inequality Unpacked

Getting to grips with the multifaceted nature of inequalities as both drivers and consequences of crisis and unsustainable development, this chapter unpacks vertical and horizontal inequalities, their intersections and their linkages with power. While different types of inequalities can be separated out analytically, for example, those related to income and wealth versus those pertaining to social groups, they are interlinked and reinforce each other in practice. As was laid out in chapter 2, vertical and horizontal inequalities cause crises, amplify their adverse impacts and shape crisis responses.

The chapter will take stock of where we stand regarding different types of inequalities at individual, group and country levels and analyse adverse impacts of inequality on key development indicators such as growth, macroeconomic stability, poverty reduction, health, nutrition, education, violence, social protection and employment. It will illustrate how inequalities develop along financialized global value chains (GVCs) and in segmented labour markets, and how they intersect for specific individuals and groups, for example, when poverty, poor health or disability status, migrant/refugee status, age, race, ethnicity or caste, gender, or sexual orientation, overlap and reinforce each other, creating particularly oppressive and protracted forms of disadvantage.

We will further demonstrate how economic, social, environmental and political privileges accumulate at the top of the income and wealth pyramid, building the foundation of elite power that often opposes transformative change toward greater social, climate and economic justice. Special attention will be paid to the impact of Covid-19 on these inequalities, as the pandemic has not only exposed and amplified pre-existing inequalities and fractures, but also pushed an emerging consensus in some quarters on the need to change the system that led us into the crisis (see chapter 2). In addition, while higher-income groups and countries can shield themselves more effectively against negative consequences of climate change, environmental crises and health pandemics than poor people or countries, they are increasingly realizing that they cannot fully detach themselves from crisis impacts and their social and political consequences. This realization that everyone depends on the global commons and



**Economic, social, environmental and political privileges accumulate at the top of the income and wealth pyramid, building the foundation of elite power that often opposes transformative change toward greater social, climate and economic justice.**

that no one is safe until everyone is safe opens a window of opportunity to renegotiate our broken social contract and to create a new eco-social one geared toward greater social inclusion, equality and ecological sustainability (see chapters 4 and 5).

The chapter is divided into four parts:

The first part introduces the conceptual framework applied to understand and analyse inequalities. The framework is based on three perspectives: inequality as a relational concept with vertical and horizontal dimensions; inequality and power, adopting an intersectional approach and a gendered lens; and inequality as a multidimensional concept that plays out differently across time—that is, over the life course and between generations—and space. The second and third parts analyse current evidence on economic and social inequalities, how these affect the implementation of the Sustainable Development Goals (SDGs) and how they shape the uneven impacts of crises, such as the climate/environmental and Covid-19 crises, on different social groups. The fourth part unpacks the power dynamics underpinning these intersecting inequalities, based on economic dominance and related political inequalities.

## Chapter key messages

### ONE

**High levels of economic inequality**, often converted into steep power imbalances, **undermine sustainable development and prevent transformative change**. When intersecting with inequalities related to group identity such as gender or race, they can lead to protracted situations of marginalization and oppression.



### TWO

**Economic inequalities**, which have spiraled upward during neoliberal globalization, **lie at the heart of power asymmetries and elite domination**. While an overall decrease in global inequality between countries has been driven by a small number of large emerging economies, gaps in terms of income and other development indicators have expanded for many developing countries.



### THREE

**Social inequalities between groups along lines such as gender, race, ethnicity or caste, age, disability, citizenship and other characteristics are based on and reproduce hierarchies by applying discriminatory rules and practices**. These social inequalities often intersect with poverty and a lack of economic resources, negatively impacting people, the economy and equity. Marginalized groups fare less well with regard to social outcomes, with intersecting forms of inequality compounding vulnerability.



### FOUR

**Political inequalities and power asymmetries drive and are driven by social and economic inequalities**, as elites accumulate influence and power to preserve and perpetuate a system that benefits the few at the expense of the many. This is a more than challenging context for realizing progressive change and has particularly devastating impacts for vulnerable groups and the environment.



## 2. Understanding Inequality: Concepts and Approaches

### 2.1 Inequality as a relational concept: vertical and horizontal dimensions

Vertical inequalities such as differences in income and wealth among individuals or households rank people on a vertical scale, from low income to high income or wealth. Vertical inequalities for a country as a whole are typically represented by the Gini coefficient, measured on a scale from equal distribution of income among a population toward completely unequal distribution, where one person has all wealth and income while all others own nothing (the latter captured by a Gini coefficient of 1, a perfectly equal distribution by a Gini coefficient of 0). Several other measures of vertical inequality exist (see box 3.2 on measurement), although data are scarcer at the top of the income and wealth distribution. Horizontal inequality takes social groups as a measure of differentiation,<sup>1</sup> for example, along lines of age, gender, sex, ethnicity, race, religion, disability or geographical location, establishing patterns of exclusion and segmentation.<sup>2</sup> Vertical and horizontal inequality is associated with class, status, power and hierarchy, emphasizing its relational character.<sup>3</sup>

The term economic inequality includes measures of vertical inequality and can be applied to individuals, groups and countries. In addition to horizontal inequality, social inequality is used either to refer to groups or to inequality in social outcomes, for example, health or educational indicators.

Inequality is reproduced in the interactions between people and through institutions and norms that regulate these interactions.<sup>4</sup> Paired or binary categories such as Black/white, male/female, citizen/foreigner and others that attribute different value to each term are powerful creators of inequality. Categorical or horizontal inequality based on discrimination and inequitable treatment has cumulative effects. In the long run, it affects individual capacities and lasting structures of asymmetric resource distribution are created along category lines.<sup>5</sup>

### 2.2 Intersecting inequality and power: deconstructing identity and hierarchy

The concept of intersectionality is attributed to Kimberlé Crenshaw, a feminist critical legal theorist who coined the term as an explicit rejection of the idea that gender, sexuality, class, race and ethnicity are separate categories of oppression.<sup>6</sup> She argued instead that “the violence that many women experience is often shaped by other dimensions of their identities, such as race and class.”<sup>7</sup> Her approach resonates with a longer history of intersectional approaches and politics used by women in the global South, in particular working class and Indigenous grassroots women’s organizations, since the 1970s.<sup>8</sup> A central advantage of an intersectional analysis is that it allows the deconstruction of identities and the examination of the challenges of equality, diversity and inclusion within each social category and subcategory, not just between them.<sup>9</sup> Its emancipatory focus is grounded in its feminist and anti-racist intentions and a focus on intersectional justice.<sup>10</sup>

The power hierarchies that drive inequalities are highly gendered in nature.<sup>11</sup> They are built on the sexual division of labour and cultural beliefs that bestow on men and masculine attributes and activities higher social status and privileges by identifying them with the public sphere and more economically and socially valued activities linked to paid work and politics, whereas women and feminine attributes and activities are granted relatively lower status and fewer privileges and are often associated with the private sphere of homes and families and the undervalued activities of care and reproduction of the human species (see Spotlight by Marta Lamas). They also rely on predominant social understandings of gender as a static and binary category, in which people have distinct but unequal relations and roles to play based on their biological differences. These roles keep the cogs of production turning through social reproduction, the sexual and gendered division of labour, separation of public and private worlds, and the centrality of the (patriarchal) family. These hierarchies serve to subordinate women in general and exclude those who do not conform to heteronormativity and cisgenderism.<sup>12</sup> This report employs an expansive definition of gender that does not focus solely on the plight of cisgender women and girls but views gender as a relational concept that is neither universal nor immutable but is the product of historical and context-specific

power dynamics. Using a gendered lens to examine inequalities provides a key insight into the way that power plays out in vertical and horizontal relations, sustained by cultural, social, economic and political norms and institutions.<sup>13</sup> This opens the door for an analysis that is not only more inclusive, but that also challenges the very structures that create and perpetuate such inequalities, not only the impacts of those inequalities.

## 2.3 A multidimensional approach: Inequality across time and space

### 2.3.1 Inequalities between generations

Adopting an intergenerational perspective offers an opportunity to consider questions of intergenerational justice and universal human rights, for example, regarding climate change and its impacts on the life chances and capabilities (people's freedom to choose what to be and do) of future generations.<sup>14</sup> It is a key component of each society's social contract. Intergenerational relations can be seen through the lens of an intergenerational contract, which can be defined as the set of norms, rules, conventions and practices which govern the relationships between different generations, at the level of families and the level of society (see Spotlight by James Heintz).<sup>15</sup> From a normative point of view, institutional arrangements governing the relationships between different generations should increase the welfare of all age groups and lead to generational equity.<sup>16</sup> For the United Nations, the issue of intergenerational solidarity and the needs of future generations is embedded in the concept of sustainable development and existing treaties, as well as declarations, resolutions and intergovernmental decisions.<sup>17</sup>

Relations between generations, including future generations, are affected by economic and social policies, demographic shifts, technological progress, as well as changes in social norms and behaviours, in particular related to family patterns and patriarchal gender norms (see chapter 1).<sup>18</sup> Development policies have been concerned with the intergenerational transmission of poverty and disadvantage for several decades.<sup>19</sup> Aid agencies have argued, for example, that the fashionable instrument of conditional cash transfers (CCTs), which link child allowances with behavioural conditions such as regular school attendance and health check-ups,

**The hegemonic gender arrangement, with its differentiated workload for men and for women, makes it impossible to reconcile family and work spheres, while it also shapes the economy and supports a social model that produces different types of oppression and exploitation.**

– Marta Lamas

*Researcher and Professor, National Autonomous University of Mexico*

improves equality of opportunity for children in disadvantaged households through investments in human capital (see section 4.2.6).

### 2.3.2 Inequalities across the life course

The life course approach is another lens that brings a time dimension into inequality studies and is closely linked not only to questions of intergenerational relations, but also to the division of labour between states, markets, families and communities regarding care provision and protection.<sup>20</sup> Rowntree (1901) pointed out periods in life when economic pressures on families and individuals reach their peaks, generating the classical “cycle of poverty” in human lives. The life course approach is regularly applied in analyses of demographic change such as ageing<sup>21</sup> and in social policy, which distinguishes policies for children, youth, working age populations and older persons.<sup>22</sup> From a justice perspective, if the state provides different levels of support to different age groups at a given moment in time this does not a priori lead to generational inequities, assuming





**This realization that everyone depends on the global commons and that no one is safe until everyone is safe opens a window of opportunity to renegotiate our broken social contract and to create a new eco-social one geared toward greater social inclusion, equality and ecological sustainability.**

that all persons require differentiated support over time.<sup>23</sup> While the stages of childhood and old age are associated with a status of dependency, hence stronger roles for families, communities and the state, markets become more dominant during the working age phase. Inequality and disadvantage tend to accumulate over time and can leave groups such as women who have shouldered unpaid care tasks or engaged in informal work in vulnerable situations in old age, which is exacerbated if social protection systems are absent or insufficient.<sup>24</sup> The priority afforded to different phases is expressed in institutional and policy frameworks, which are in turn shaped by cultural and social norms and the advancement of the demographic transition in a particular country (see chapter 1).<sup>25</sup> Whereas questions of pensions and long-term care have high priority in high-income countries with ageing societies, policies for children and youth have priority in countries with younger age structures. Overall, however, a balanced generational welfare contract, one that is neither biased toward old age populations, working populations or children, is associated with better social outcomes for indicators such as poverty, subjective well-being or trust for selected mature welfare states.<sup>26</sup> The life course approach was adopted in international social protection instruments such as International Labour Organization (ILO) Recommendation No. 202 on National Social Protection Floors.<sup>27</sup>

### 2.3.3 Spatial inequalities

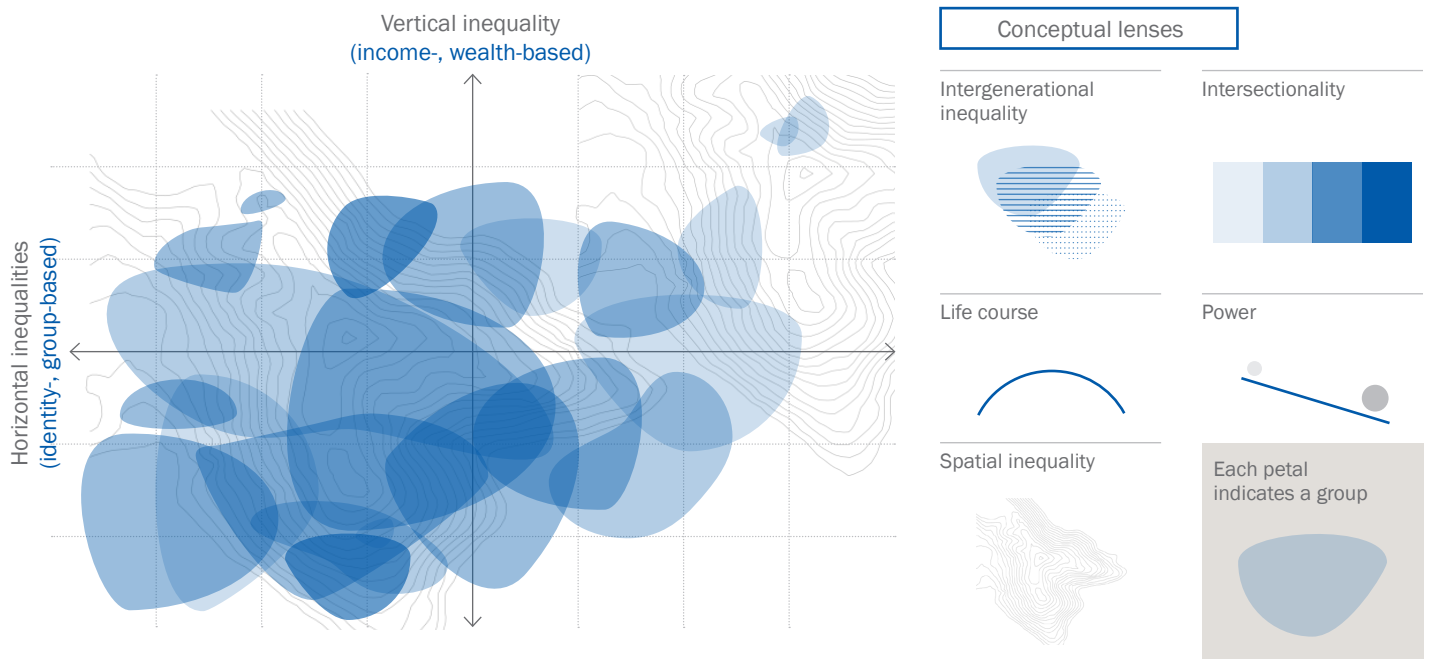
Next to the temporal inequality dimensions addressed through intergenerational and life course approaches, spatial dimensions are relevant when analysing inequalities and their impacts. They are part of horizontal inequalities which categorize populations according to their place of residence, for example, into urban and rural, slum dwellers or inhabitants of gated communities for the rich, or are manifested as regional inequalities within a country, sometimes intersecting with ethnicity, race or religion.<sup>28</sup> Many environmental inequalities have a particular spatial or territorial dimension, as there is inequality in the exposure to harmful pollution, destruction of natural resources and the impacts of climate change. The way these inequalities affect people is often of an intersectional nature, with groups suffering from multiple discriminations and disadvantages clustering in adverse geographical or urban locations.

Despite increasing connectedness and exchange in the age of globalization, “place remains fundamental to the problems of membership in society,”<sup>29</sup> defining how people are integrated into social contracts, with impacts on life chances, voice, access to resources, employment and public services. Place of birth and citizenship are also fundamentally important factors configuring and determining inequalities that shape people’s life chances and opportunities.<sup>30</sup> The importance of location and place and its link with citizenship plays out strongly for mobile populations such as migrants or refugees, who tend to become exposed to new vulnerabilities and risks during their migration journey and in their place of destination as they leave behind citizenship rights, networks and place-bound knowledge and skills (see chapter 1).<sup>31</sup>

Further, spatial inequality has profound implications for social mobility. Accumulated privilege—a combination of gender, race and income—allows rich elites and their offspring to occupy privileged spaces in urban environments and labour markets, amplifying their influence and power (see chapter 1). Intergenerational transfer of privilege is key to this story, as it enables advantaged groups to isolate themselves in areas of privilege where they accumulate and hoard resources and opportunities.<sup>32</sup> At the same time, disadvantaged groups remain relegated to areas of deprivation.<sup>33</sup>

The conceptual framework is illustrated in figure 3.1.

**Figure 3.1 Conceptual framework**



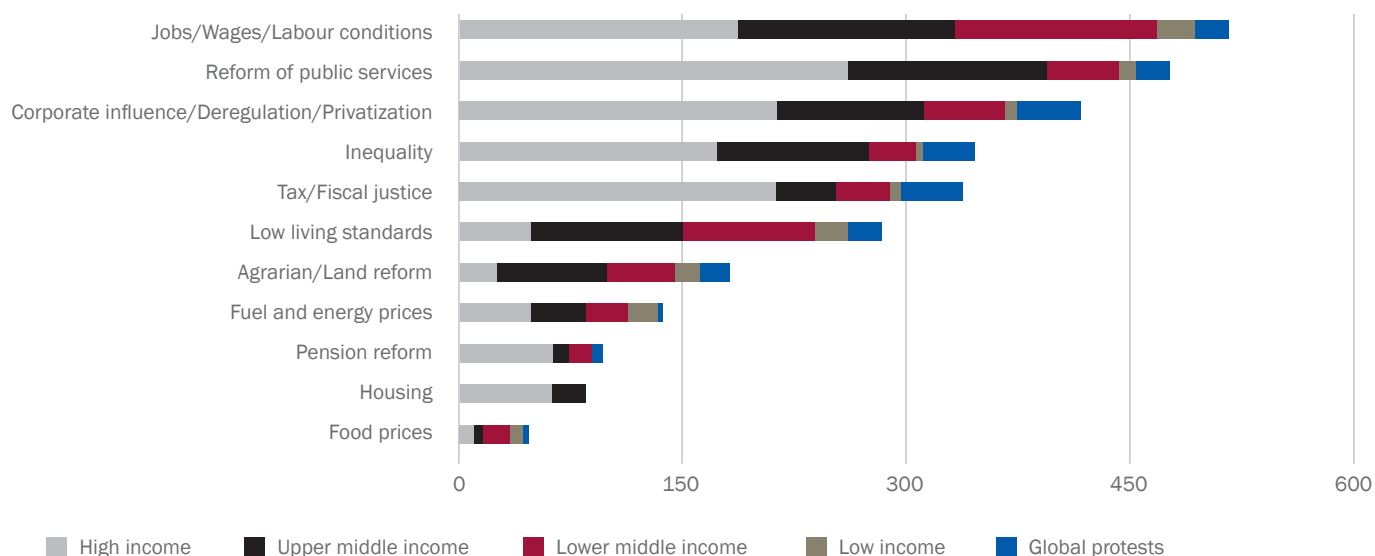
### 3. Economic Inequalities: How an Economy for the 1% Threatens Sustainable Development

“We are the 99%” is the powerful slogan coined by the Occupy Wall Street movement in the United States that describes our age of inequality and the discontent it has created. Economic inequalities, differences in income and wealth between individuals, groups, regions and countries, have, with some notable exceptions (see below), spiraled upward in the age of neoliberal hyperglobalization, making our economies and societies more fragmented, unstable, unsustainable and unfair. Starting in the late 1990s, social movements and protesters openly criticized an economic and political system that was increasingly perceived as disproportionately benefiting powerful and rich elites to the detriment of most people and our planetary resources (figure 3.2; see chapter 2).<sup>34</sup> This movement on the streets was accompanied by a radical shift in the concerns of the academic community, with a growing number of research publications providing compelling evidence on

the detrimental impacts of inequality on growth, poverty reduction, well-being and health, democracy and participation, as well as environmental sustainability.<sup>35</sup>

The combination of scientific evidence and collective mobilization had policy impact: in 2015, after controversial debates and for the first time in history, governments agreed to integrate the reduction of economic inequality within and between countries into the 2030 Agenda for Sustainable Development.<sup>36</sup> That said, indicators designated for measuring progress on SDG 10 focused on shared prosperity rather than extreme inequality, reflecting continuity with the poverty agenda that had dominated donor strategies over the last decades (see Spotlight by Fukuda-Parr; see chapter 1).

The focus on inequality and the goal to reduce it, currently supported by a diverse group of actors including trade unions, activists, social movements, international financial institutions and business representatives,<sup>37</sup> signals a sea change after decades of neglect of the issue in development theory and practice.<sup>38</sup> This neglect can be explained by a variety of factors, from decreasing inequality levels in the

**Figure 3.2 Protests for economic justice/against austerity, 2006–2020 (by country income groups)**

Source: Ortiz et al. 2022. Reproduced under Creative Commons license 4.0: <http://creativecommons.org/licenses/by/4.0/>.

post-war period to market euphoria and ideological shifts after the neoliberal turn in the 1980s, to the generalized assumption that high-income earners and entrepreneurs are more productive than the average citizen while also benefiting the economy by channeling their savings and profits into investments that spur growth, to the conviction that policy makers should focus on poverty reduction, not inequality, as the most important development challenge (see box 3.1). The more recent realization that inequality prevents poverty reduction (see section 3.1) has refocused attention on inequality and facilitated its inclusion into the SDGs.

Research evidence points to a variety of *drivers of economic inequality*, some of which are associated with global trends and the neoliberal policies that have shaped them, as discussed in chapter 1: technological change and international competition through increased globalization favour those with higher-level skills;<sup>39</sup> cultural factors such as the practice of marriage between people of similar backgrounds;<sup>40</sup> decreasing union power;<sup>41</sup> rent-seeking behaviour by business elites;<sup>42</sup> regressive taxation policies (especially the reduction of taxes on the rich, as lower top marginal income tax rates are strongly associated with rising top incomes)<sup>43</sup> as well as tax evasion; lack of formal jobs and social protection;<sup>44</sup> and access to remittances for households with members who have migrated abroad vis-à-vis households without migrants.<sup>45</sup>

**The choice of these measurement tools is supposedly technical, but behind a seemingly technical choice lies a political agenda. The choice of the shared prosperity measure excludes from the narrative the problems of extreme inequality and the power of the wealthy.**

– Sakiko Fukuda-Parr

Professor,  
The New School



### Box 3.1 Why economists have neglected inequality

During the early period of post-war development, economic inequality was not considered of high relevance as inequalities in wealth and income were decreasing,<sup>a</sup> a rising tide of economic growth seemed to be lifting all boats and the prevailing social contract in industrial countries was set on more equalized capital–labour relations (see chapters 2 and 4). The key development question was how to combine growth and full employment. In the global South, where initial inequalities were much higher as a result of historical injustices such as colonialism and slavery, it was assumed that these countries had not yet reached the stage of equalizing redistribution. This assumption was based on the influential Kuznets curve,<sup>b</sup> which establishes that inequalities first increase and then decrease during the industrialization process, following an inverse U-shape.

The second reason for considering inequality as a minor concern was the assumption that in market economies, a certain level of inequality was inevitable due to differences in effort and ability (see chapter 1)<sup>c</sup> while also being a positive driver of economic growth. As Mkandawire (2017) explains, according to classical economic theory, most economists hold that rising profits lead to higher savings, investments and growth, whereas workers are assumed to consume most of their wages. The relationship between profits and growth, the assumption of productive reinvestment of profits (corporate savings) as well as the channeling of savings of high-income earners into investments through the financial system have been to justify tolerating economic inequality of functional (capital versus labour share in output) and personal income. While this argument was taken up by development economist Arthur Lewis (1954), he also noted that distribution of the economic surplus could lead to higher rents instead of profits, while capital export and conspicuous consumption instead of domestic productive investment would undermine the savings effect.

In contrast to Kuznets's assumption, inequality started to rise again during the era of neoliberal globalization.<sup>d</sup> During this period, the key development question was how to combine growth and price stability. Growth was supposed to automatically trickle down to the poor, whereas large-scale redistribution through state policies was considered detrimental for growth. This free-market ideology and its adverse development impacts met mounting criticism,<sup>e</sup> triggered the social turn in the 1990s and 2000s<sup>f</sup> and eventually propelled inequality back onto academic, development and public agendas after the global economic and financial crisis in 2008.<sup>g</sup>

<sup>a</sup> Piketty 2014 2019; <sup>b</sup> Kuznets 1955; <sup>c</sup> Mankiw 2013; <sup>d</sup> Atkinson 1997; Piketty 2019; <sup>e</sup> Stiglitz 2002; UNRISD 1995; <sup>f</sup> UNRISD 2016a; <sup>g</sup> Peterson 2017; Wike 2014.

In addition to identifying individual drivers of inequality, this chapter recognizes the systemic nature of inequality in our current development model: economic inequalities to the extent that we observe today are related to historical legacies and injustices and have further thrived in the age of financialization and hyperglobalization (see chapters 1 and 2). They are related to asymmetries in global trade, investment and financial regimes and a policy and regulatory environment that fosters the concentration of rents as well as tax avoidance and evasion by leading multinational corporations (MNCs) while value is extracted at the lower end of GVCs, imposing huge costs on workers, women, local communities and ecosystems. The flip side of greater capital concentration and business power is the increasing livelihood insecurity of smallholders and micro-enterprises and a growing precarious and mobile workforce made up of migrant, informal and gig economy workers, lacking social protection and secure incomes while being exposed to high risks in times of crisis or shocks.<sup>46</sup>

### 3.1 Why we should care about economic inequality

Beyond the intrinsic value of egalitarian and just societies, which increases trust of citizens in the political system and the social contract (see chapters 1 and 2), economists and development actors have been particularly interested in the effects of economic inequality on economic growth and poverty reduction.<sup>47</sup> While classical/neoclassical theory established a positive association between *inequality and growth* (box 3.1; see chapter 5 for a critique of the growth paradigm), heterodox economists have identified adverse impacts of high inequalities for growth, especially if these are associated with high levels of extreme poverty. Rising inequality is also deemed problematic if combined with stagnating or falling incomes of the working class, as it hampers social mobility and labour market prospects and creates social discontent.<sup>48</sup> The negative inequality–growth link develops through various channels such as economic and financial crises (see chapter 2), insufficient domestic demand when groups with high propensity to consume earn less and adverse implications of a poorly educated workforce for productivity. In addition, high levels of inequality might lead to a range of social and political ills which in and of themselves are undesirable, while at the same time undermining economic development: social conflict, high insecurity and criminality, low

levels of trust (chapter 2), undue political influence of the rich and rent-seeking behaviour.<sup>49</sup> Evidence further shows that high income inequality leads to greater political instability, which worsens investment conditions.<sup>50</sup>

Development economists are also increasingly drawing attention to the negative relationship between *inequality and poverty reduction*. In conventional economic theory, inequality would not be considered an impediment to poverty reduction if inequality were to increase growth sufficiently, as growth was supposed to trickle down to the poor (box 3.1). However, this approach ignored the negative impact of inequality on the stability of the economic and financial system. Chapter 2 has demonstrated that rising inequalities were at the heart of the financial crisis in 2008/2009, which increased poverty and undermined the well-being of millions of people across the world. Testing the trickle-down assumption, Lakner et al. (2020) have compared the relative efficacy of either increasing growth or reducing inequality on reducing extreme poverty. When holding within-country inequality unchanged and letting GDP per capita grow according to World Bank forecasts and historically observed growth rates, their simulations suggest that the number of extreme poor (living on less than USD 1.90/day) will remain above 600 million in 2030, resulting in a global extreme poverty rate of 7.4 percent. If the Gini index in each country decreases by 1 percent per year, the global poverty rate could be reduced to around 6.3 percent in 2030, equivalent to 89 million fewer people living in extreme poverty. Reducing each country's Gini index by 1 percent per year has a larger impact on global poverty than increasing each country's annual growth 1 percent above forecasts. Given the current context of rising inequalities and food and energy price hikes, a recent simulation finds that a 2 percent average annual increase in income inequality could increase the global poverty headcount by around 200 million people by 2030.<sup>51</sup>

In addition to the positive effect of reducing economic inequality for poverty reduction, we can also assume that it would have a positive effect on *fiscal capacity and state revenues*, which, if progressively spent, could further reduce poverty and increase well-being in a virtuous cycle. Highly unequal low- or middle-income countries tend to have lower tax takes (which limits fiscal space for redistribution and investment in equalizing opportunities)<sup>52</sup> for several



## Economic inequalities to the extent that we observe today are related to historical legacies and injustices and have further thrived in the age of financialization and hyperglobalization.

reasons: a larger part of the population earns low incomes or works in the informal economy, with less ability to pay taxes;<sup>53</sup> those who are in the highest income brackets have greater possibilities to avoid or evade taxes and to influence tax legislation;<sup>54</sup> and governments often have limited administrative capacity for tax collection and enforcement, in particular hard-to-collect taxes such as income tax.<sup>55</sup>

Finally, economic inequality has detrimental impacts for *climate change and the natural environment*, while environmental degradation is also a driver of horizontal inequality, as marginalized groups such as poor households or those with racialized and minority ethnic backgrounds are more exposed to natural hazards and pollution (see chapter 2 as well as section 4 on social inequalities in this chapter).

### 3.2 Economic inequalities: Where do we stand?

#### 3.2.1 Income inequality

From a historical perspective, the income and wealth gaps between the rich countries of the global North and the developing countries of the global South have been growing for half a millennium, since around 1500, and began accelerating about two centuries ago in the context of industrialization and imperialism.<sup>56</sup> Colonialism greatly increased inequality: colonies had Gini coefficients nearly 13 percent higher than those of non-colonies. In Latin America, inequality increased from an estimated 22.5 percent in 1491 to over 60 percent in 1929.<sup>57</sup> Chancel and Piketty (2021:9) find that within-country inequality dropped during the period



## Colonialism greatly increased inequality.

1910–1980 (while between-country inequality kept increasing) but rose during the period 1980–2020 (while between-country inequality started to decline; figure 3.3). This is largely the result of the different policy models applied during these periods, driven by specific crisis events and conjunctures and an ideological turn (figure 3.2), leading to a shift from state-led development and a highly regulated international economy in the post-war period to market-led approaches and Washington consensus policies from the 1980s onwards (chapter 2). In economic terms, it reflects the “central contradiction of capitalism,” identified by Piketty, fuelled by regressive fiscal policies and ongoing capital-labour substitution: “The principal destabilizing force has to do with the fact that the private rate of return on capital,  $r$ , can be significantly higher for long periods of time than the rate of growth of income

and output,  $g$ . The inequality  $r > g$  implies that wealth accumulated in the past grows more rapidly than output and wages.”<sup>58</sup>

In this process, the top 1 percent of income earners captured 22 percent of total world growth between 1980 and 2020, versus 11 percent for the bottom 50 percent.<sup>59</sup>

### 3.2.2 Wealth inequality

Wealth distribution is even more unequal compared with income distribution, with the greatest concentration at the top, accelerating in recent years as suggested by a recent annual series of Oxfam reports to the World Economic Forum. Even before the pandemic, in 2018, 26 people owned the same amount of wealth as the 3.8 billion people who make up the poorer half of humanity, down from 43 people in 2017. A third of the world’s billionaires’ wealth was inherited, while another 43 percent can be attributed to cronyism, involving mainly political connections. The super-rich and big corporations have accelerated wealth concentration by evading taxes, minimizing costs and influencing relevant policies and regulations.<sup>60</sup> During the Covid-19 pandemic, a new billionaire was created every 30 hours.<sup>61</sup>

**Figure 3.3 Global income inequality within and between countries, 1920–2020**

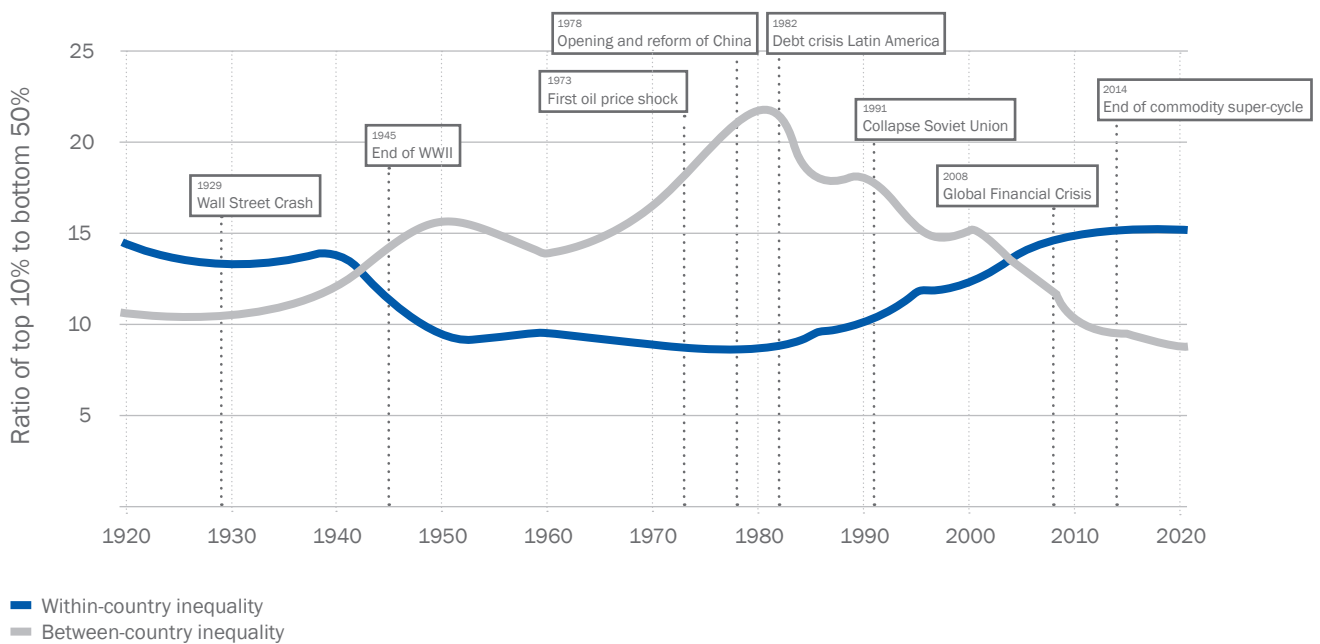
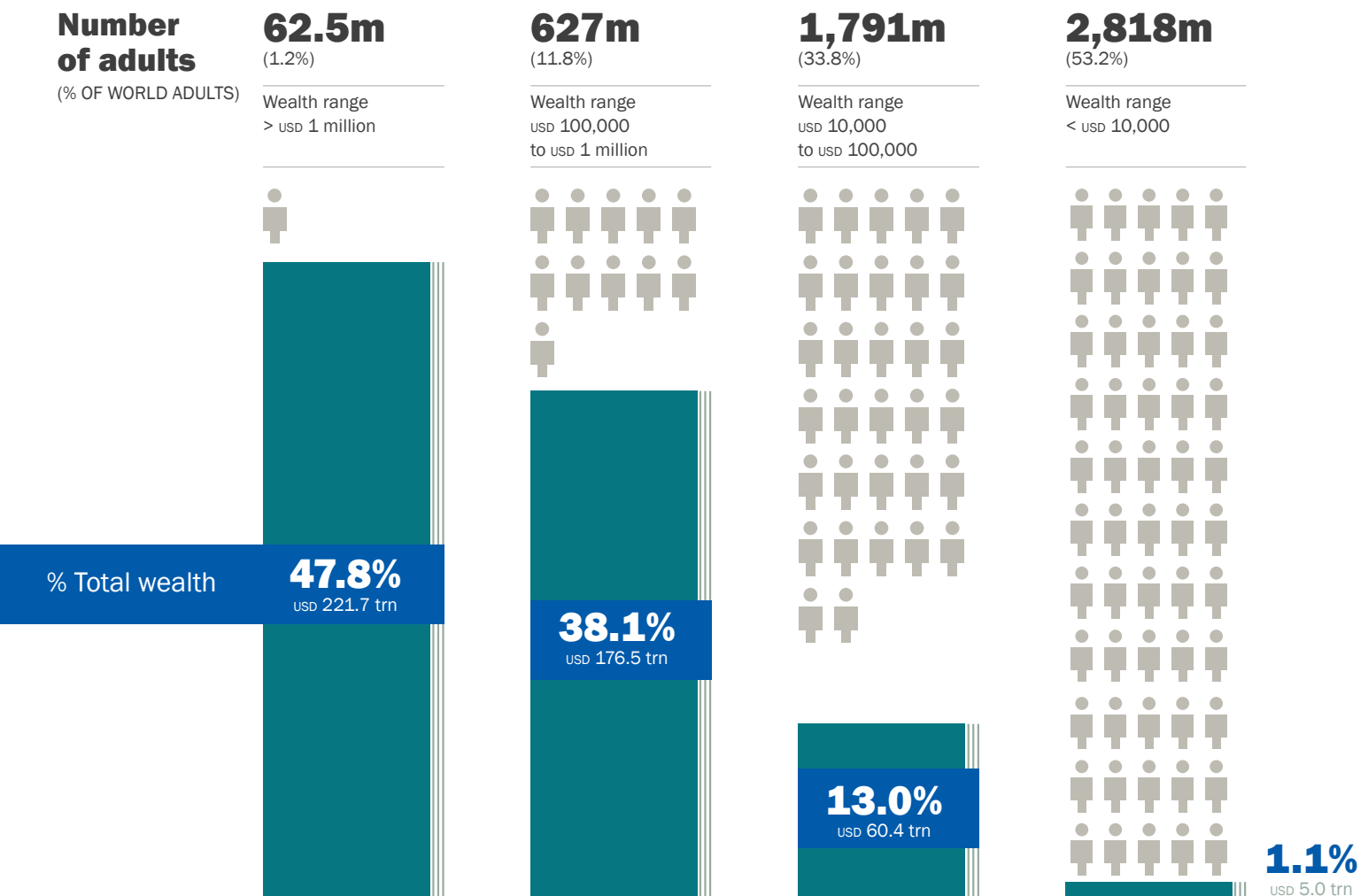


Figure 3.4 Global wealth distribution



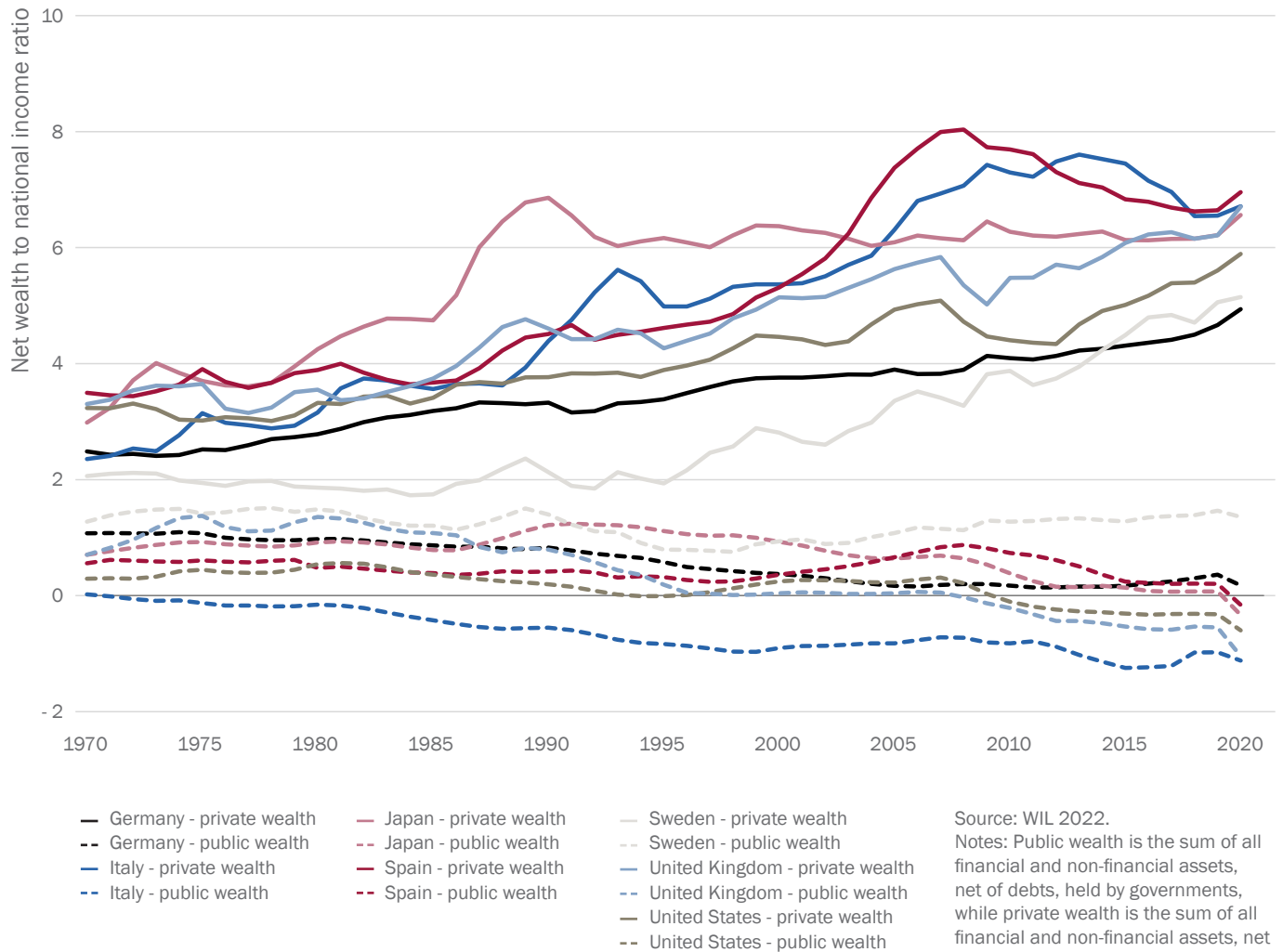
Data source: Credit Suisse 2022.

Within OECD countries, wealth distribution is very concentrated, much more so than income distribution.<sup>62</sup> Wealth dispersion is especially high in the United States and Sweden, which shows that the most wealth-unequal countries are not necessarily the most income unequal. Wealth inequality came down from the beginning of the twentieth century up to the 1970s but has since been on the rise. Major explanations for this development include soaring financial markets in the aftermath of financial market deregulation in the 1970s, lighter taxation of top incomes and wealth which has favoured the accumulation of wealth, and the rising importance of inheritances and gifts. A similar picture can be found in Germany, which has one of the highest concentrations of wealth in the top decile of households among OECD countries,



**A third of the world's billionaires' wealth was inherited, while another 43 percent can be attributed to cronyism.**

**Figure 3.5 Public and private wealth, 1970–2020 (selected countries)**



featuring a net asset Gini coefficient of 0.79. The bottom 50 percent of the population holds only 1 percent of the net assets while the wealthiest 10 percent of German households own approximately 65 percent of net assets, compared with 44 percent in 1970.<sup>63</sup>

Despite the Covid-19 crisis, in 2020 total global wealth grew by 7.4 percent and wealth per adult rose by 6 percent to reach another record high of USD 79,952 (up from USD 31,378 in 2000) and USD 87,489 in 2021, mainly related to rising share and housing prices, and with most gains concentrated in the global North and Asia, in particular in the United States, now home to 39 percent of all millionaires in the world. Global wealth concentration continued in 2021, with total global wealth increasing by an estimated 9.8 percent, and the richest 1 percent

further increasing their share from 44 percent in 2020 to 46 percent in 2021.<sup>64</sup> Fiscal rescue packages and low interest rates have stabilized the economies, but at a high cost: public debt relative to GDP has risen by 20 percentage points or more in many countries around the world. In essence, there has been a huge transfer from the public sector to the household sector, which is one of the reasons why household wealth has been so resilient (figure 3.4).<sup>65</sup>

The increase in wealth concentration at the top is mirrored by a clear tendency since the 1970s of increasing private wealth as a share in national income compared to public wealth (see figure 3.5). When private wealth-to-income ratios increase, it means that the relative weight of those who own capital is overtaking the weight of those who only live off their incomes.<sup>66</sup>

Unequal asset distribution such as land inequality is another important element in this picture with direct livelihood impacts, as 2.5 billion people in the world are estimated to work in smallholder agriculture. According to the International Land Coalition,<sup>67</sup> smallholders and family farmers, Indigenous peoples, rural women, youth and landless people have to get by with smaller parcels of land or are forced off the land altogether, while land is concentrated in the hands of corporate agrobusinesses or remote investors offering few employment opportunities. With historical roots in feudalism, colonialism and imperialism, land inequality has increased since the 1980s in the context of neoliberal globalization, where policies promoted large-scale industrial farming for export and increased corporate and financial investment in food and agriculture. According to the study, the largest 1 percent of farms operate more than 70 percent of the world's farmland, while more than 80 percent of smallholders own less than 2 hectares of land and tend to be excluded from global food chains.<sup>68</sup>

### 3.2.3 Inequality between countries

At the global level, we observe *convergence between countries*, driven by the rapid growth of large economies such as China and India, and by higher per capita growth rates compared with OECD countries of various countries in the global South up to 2014.<sup>69</sup> Historically, the most important periods of global convergence were the rise of Latin America to middle-income levels since the late nineteenth and early twentieth centuries and through the inter-war period and the catching up of East Asian economies since the 1960s.<sup>70</sup> Altogether, this has produced an increase in developing countries' share of world output, manufacturing and trade, although these gains were concentrated in a few countries.<sup>71</sup> The share of exports from least developed countries (LDCs), for example, in global merchandise trade remained constant in 2019 at 1 percent. Over the last decade that share has stagnated, after significant improvements from 2000 to 2010, largely due to the boom in global commodity prices.<sup>72</sup>

The income convergence between developed and developing nations has lowered overall global inequality since the late 1980s despite rising within-country inequality.<sup>73</sup> While this is a considerable



**Despite a decline in relative inequality between countries, absolute disparities between countries have increased.**

achievement, the narrative of convergence between global North and global South needs to be treated with caution. The world's poor population continues to be concentrated in the global South, whereas most rich people live in the global North. Despite a decline in relative inequality between countries, absolute disparities between countries have increased: the gap between the average per capita income of high- and low-income countries increased from USD 27,600 in 1990 to over USD 42,800 in 2018.<sup>74</sup>

There is a compelling critique of the global convergence narrative: disparities between developed and developing countries are still huge and have increased over time, whereas much of the convergence narrative is based on specific indicators and methods, the China and East Asia effect and a focus on basic human development indicators.<sup>75</sup> We get a different picture if we look, for example, at per capita income in Africa as percent of per capita income in HICs over time; table 3.1 shows that this ratio declined from 8.5 percent in 1962 to 3.3 percent in 2021. Significant disparities are also visible when we compare social protection coverage (see section 4.2.6).<sup>76</sup>



These findings are supported by other evidence<sup>77</sup> revealing that absolute inequality between persons, as measured by the absolute Gini coefficient (which is based on absolute changes in income) has increased significantly since the mid-1970s (see box 3.2 on the difference between relative and absolute Gini coefficient). The study emphasizes, however, that much of the rise in absolute inequality is a result of high growth rates, which have lifted around one billion people out of extreme poverty in one generation.

### 3.2.4 Post-market distribution

Tax and transfer systems play an important role for distributional outcomes. It is important to compare both market or primary distribution and

post-market or secondary distribution (disposable income) to better understand the causal drivers of economic inequality, which can be located either in the workings or “fundamentals” of the economic system or in the policy/power domain, although policy also has an impact on how markets work. Regarding market inequality, evidence shows that globalization and financialization triggered a new process of “unequalization” across the OECD (as well as in Eastern Europe, Russia, China and India), bringing them closer to patterns observed in more unequal middle-income countries.<sup>78</sup> Indeed, while market distributions are often similar between developed and developing countries, the latter are less successful in reducing inequalities through tax and transfer systems, with income and direct taxes having a higher distributional impact compared to

**Table 3.1 Per capita income of low- and middle-income countries as a percentage of high-income countries, 1962 to 2021**

Year	Low and middle income	Sub-Saharan Africa	Middle East and North Africa	Latin America and Caribbean	East Asia and Pacific	South Asia
1962	8.9	8.5	-	-	4.8	5.8
1965	9.2	8.0	-	-	5.3	5.9
1968	7.9	7.1	-	21.2	4.2	4.4
1971	7.8	7.3	-	20.9	4.3	4.1
1974	7.6	7.2	-	21.9	3.9	3.4
1977	7.7	7.2	-	22.2	3.7	3.0
1980	6.9	6.6	-	20.7	3.0	2.7
1983	7.3	8.2	-	19.6	3.3	3.0
1986	6.1	5.1	-	14.6	3.3	2.7
1989	4.5	3.8	-	11.2	2.3	2.2
1992	4.2	3.2	-	12.7	2.4	1.7
1995	4.2	2.5	5.4	14.7	3.0	1.6
1998	4.7	2.5	6.8	17.5	3.5	1.7
2001	4.5	2.3	7.2	15.2	3.9	1.8
2004	4.8	2.5	6.9	12.6	4.6	1.9
2007	6.3	3.3	8.7	15.7	6.1	2.3
2010	8.4	3.8	11.5	19.4	9.5	2.9
2013	10.5	4.2	11.1	22.9	13.3	3.4
2016	10.8	3.9	9.9	19.7	16.3	3.9
2019	11.0	3.4	8.0	18.1	18.1	4.5
2020	11.0	3.4	7.4	16.4	19.0	4.3
2021	11.1	3.3	7.2	15.7	19.4	4.4

Source: Calculations of report team based on World Bank 2022.

Notes: Methodology based on Peterson 2017.

## Box 3.2 Measuring economic inequality

Income disparities among individuals can be divided into income, wealth and pay/wage inequality. **Income** inequality is the extent to which income is distributed unevenly across people or across households. Income encompasses labour earnings (such as wages, salaries and bonuses), capital income derived from dividends, interest on savings accounts, rent from real estate, as well as welfare benefits, public pensions and other government transfers. There are further distinctions between individual versus family income, pre-tax versus after-tax (disposable) income and labour earnings versus capital income. While income refers to the flow of money over a given period, an individual's **wealth** represents the stock of assets a person holds, including financial assets such as bonds and stocks, property and savings.

**Consumption inequality** tends to be lower than income inequality as individuals can smooth temporary shocks to income through savings and borrowing and richer people tend to save a higher proportion of income than poor people. Consumption inequalities are a better measure to reflect differences across individuals in the accumulation of assets, access to credit or social protection.

The choice between income or consumption measures is often determined by **data availability**. Advanced economies tend to collect high-quality income data, especially those drawn from administrative tax records. Consumption data are particularly relevant for developing countries, where it is difficult to obtain reliable estimates of income because a large part of the population is self-employed, producing for their own consumption (especially in agriculture) or being paid in kind. For this reason, World Bank Development Indicators on inequality for LDCs are typically estimated based on household consumption expenditures.

The **Gini coefficient** is the most commonly used summary measure of economic inequality, taking values between 0 (which refers to "perfect equality") and the maximum value of 1 (when one person earns all the income). The lower the Gini value, the more equal a society is. This measure is not perfect, however, as economies with similar Gini coefficients can have very different income distributions.

A commonly used **percentile ratio**, also called the "interdecile ratio," is the 90–10 ratio, which shows the income level of individuals at the top of the income distribution (top 10 percent) relative to the income level of those at the bottom of the distribution (bottom 10 percent). Another commonly used share ratio is 90–40, called the **Palma ratio**.<sup>a</sup> It represents a ratio of the income of the richest 10 percent of the distribution to those in the bottom 40 percent. Societies with a Palma ratio of 1 or below 1 tend to be viewed as relatively equal, meaning that the top 10 percent does not receive a larger share of national income than the bottom 40 percent.

In addition to income distribution measured at the personal or household level, **functional income distribution** or factor shares measure distribution of income to factors of production: rent for land, wages for labour and profits for capital. Attention has shifted away from functional to personal income distribution, with implications for political economy and social policy.<sup>b</sup> These shares reflect the relative power of different groups and are therefore evoked in debates on social justice and fairness, though neoclassical theory states that factor returns are based on marginal productivity. Both types of distribution are closely linked: a greater labour share in national income is, for example, associated with lower Gini coefficients of personal income distribution across a range of developed and developing countries.<sup>c</sup> Factor shares link income to productive activity, and this is relevant to understand not just the distribution of income but also the way in which we evaluate the fairness of the distribution. There are good reasons why people refer to wages, salaries and self-employment income as "earned income," and to profits and rent as "unearned income."<sup>d</sup>

Measuring economic inequality relies on **data quality**. Household surveys have the disadvantage that high-income earners often fail to respond to surveys or may not be willing to reveal their financial situation; at the same time, poor people might not be reached by surveys at all. Information from tax collection tends to report higher earnings among the wealthy compared with household surveys, yielding more information on the situation of top earners rather than low earners. However, underreporting of income to tax authorities, non-requirement to declare income for those who earn too little to pay taxes and activities in the shadow economy, often paid in cash and not reported, are undermining data quality.

Finally, it is important to distinguish between **relative and absolute measures of inequality**. Colenbrander and Norton (2016) explain the difference through an example: they assume that the daily income of a poor person receiving USD 1 grows by 50 percent while the income of a rich person receiving USD 100 grows by only 1 percent. The daily income of the poor person will rise to USD 1.50, while the income of the rich person will rise to USD 101. The income of the poor person has proportionately grown much faster, increasing their share of total national income. Yet the absolute income gap has widened from USD 99 to USD 99.50. This explains why periods of high growth can contribute to significant poverty reduction while increasing absolute inequality.

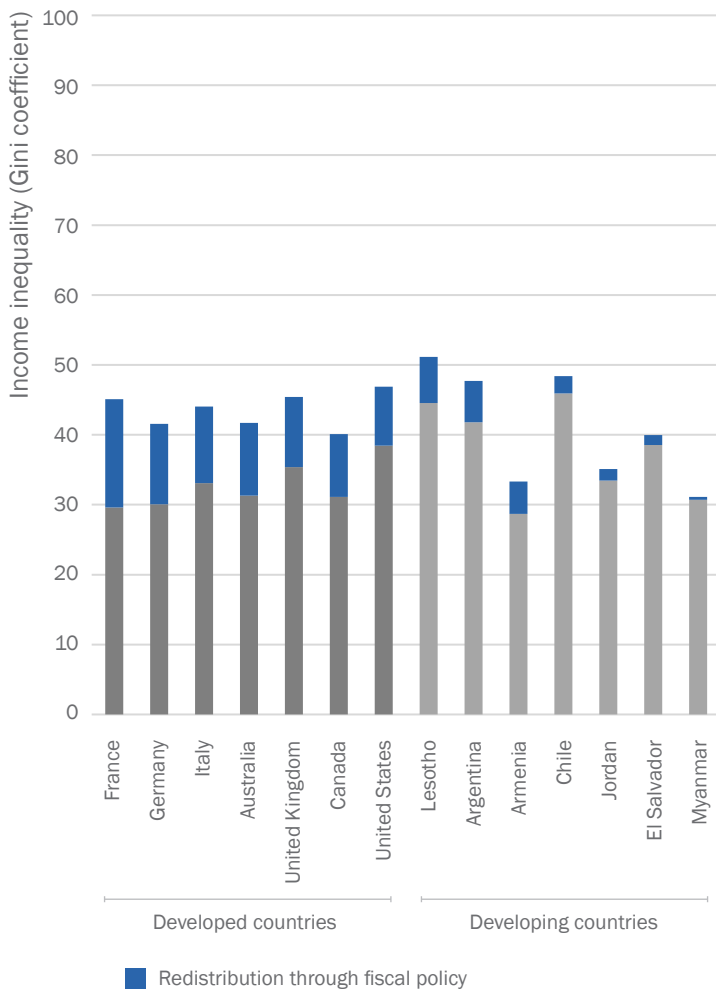
**SDG 10** is focused on shared prosperity rather than extreme inequality, which can be interpreted as a political choice.<sup>e</sup> It only measures relative inequality—which means that even if countries achieve the quantifiable target, absolute inequality could continue to soar. However, the income of the poor will have to increase by substantially more than the average prescribed by SDG 10 if countries are to reduce absolute inequality of income. Another limitation of SDG 10 is that it uses average income as a reference point. The global conversation around inequality has been focused not on the difference between the bottom 40 percent and the average but on the consequences of extreme wealth and poverty. In Germany, for example, the income of the average person in the bottom 40 percent would have to increase at 4.4 times the rate of their counterpart, the top 10 percent, and in France, it would have to be 5.3 times the rate, just to maintain the difference, not reducing absolute inequality.

<sup>a</sup> Palma 2011; <sup>b</sup> Atkinson 2009; Mkandawire 2017; <sup>c</sup> Daudey and García-Peñalosa 2007; <sup>d</sup> Atkinson 2009:12–13; <sup>e</sup> Fukuda-Parr 2019.

Sources: Colenbrander and Norton 2016; Keeley 2015; Trapeznikova 2019.

transfers (figures 3.6, 3.7).<sup>79</sup> Considerable variation exists in the group of middle-income countries (from highly unequal in South Africa or Brazil to fairly equal in former socialist countries), suggesting that policy matters.<sup>80</sup> This difference also shows that some developed countries such as Sweden and Germany make considerable fiscal efforts to lower their high market Gini coefficient: in order to get to a disposable income Gini of about 30, Germany needs a relative reduction of its market Gini of 44 percent, while South Korea needs a decrease of just 9 percent to achieve the same result.<sup>81</sup> Where market inequalities are high and fiscal policies less effective, as in many countries in the global South, disposable income Gini coefficients are high (see figures 3.6, 3.7).

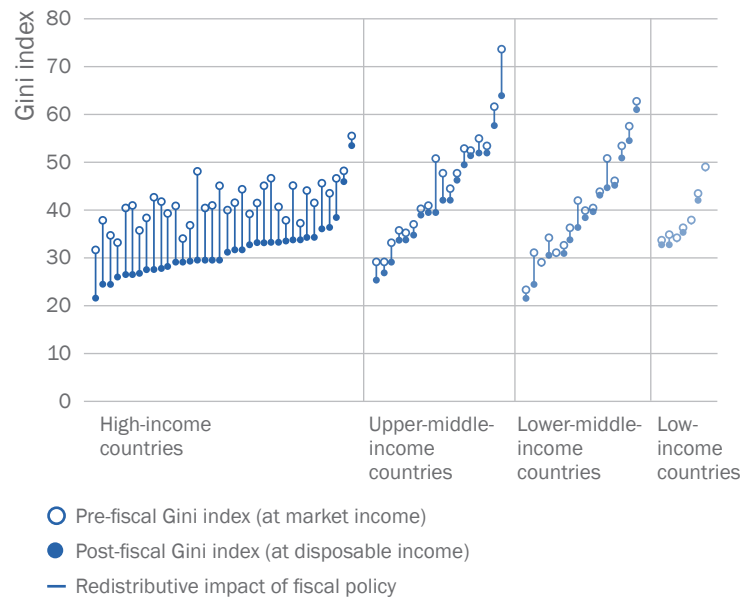
**Figure 3.6 Inequality before and after fiscal policy**



Source: UN DESA 2021.

Notes: The Redistributive Impact of Fiscal Policy indicator is defined as the Gini Index of pre-fiscal per capita (or equivalized) income minus the Gini Index of post-fiscal per capita (or equivalized) income. This figure uses pre-fiscal income and post-fiscal disposable income.

**Figure 3.7 Redistributive impact of direct taxes and cash transfers, 2007**



Source: From UN 2021. Copyright United Nations 2021. Used with permission.

Given the high importance of social spending and domestic resource mobilization policies for equality outcomes, it becomes clear that widespread spending cuts, so-called *austerity policies*, regularly implemented as stabilization measures in times of economic and financial crises, have highly detrimental impacts on economic and social inequalities as they undermine efforts by the state to counteract them (see chapters 1 and 5).<sup>82</sup>

### 3.3 Inequalities along global value chains

One of the clearest examples of how the current structure of the global economy drives economic inequalities and how these are linked to social, environmental and political inequalities is that of global value chains, locating the different stages of the production process across different countries (see chapter 1). This geographical and spatial fragmentation of the production process associated with global supply chains, strongly promoted by neoliberal policy makers, has now emerged as a major carbon polluter and societal threat.<sup>83</sup> GVCs produce vertical and horizontal inequalities and also benefit from inequalities, serving powerful economic and political interests.<sup>84</sup> The dynamics of a global economy dominated by GVCs contribute to the patterns of inequality described above, despite a

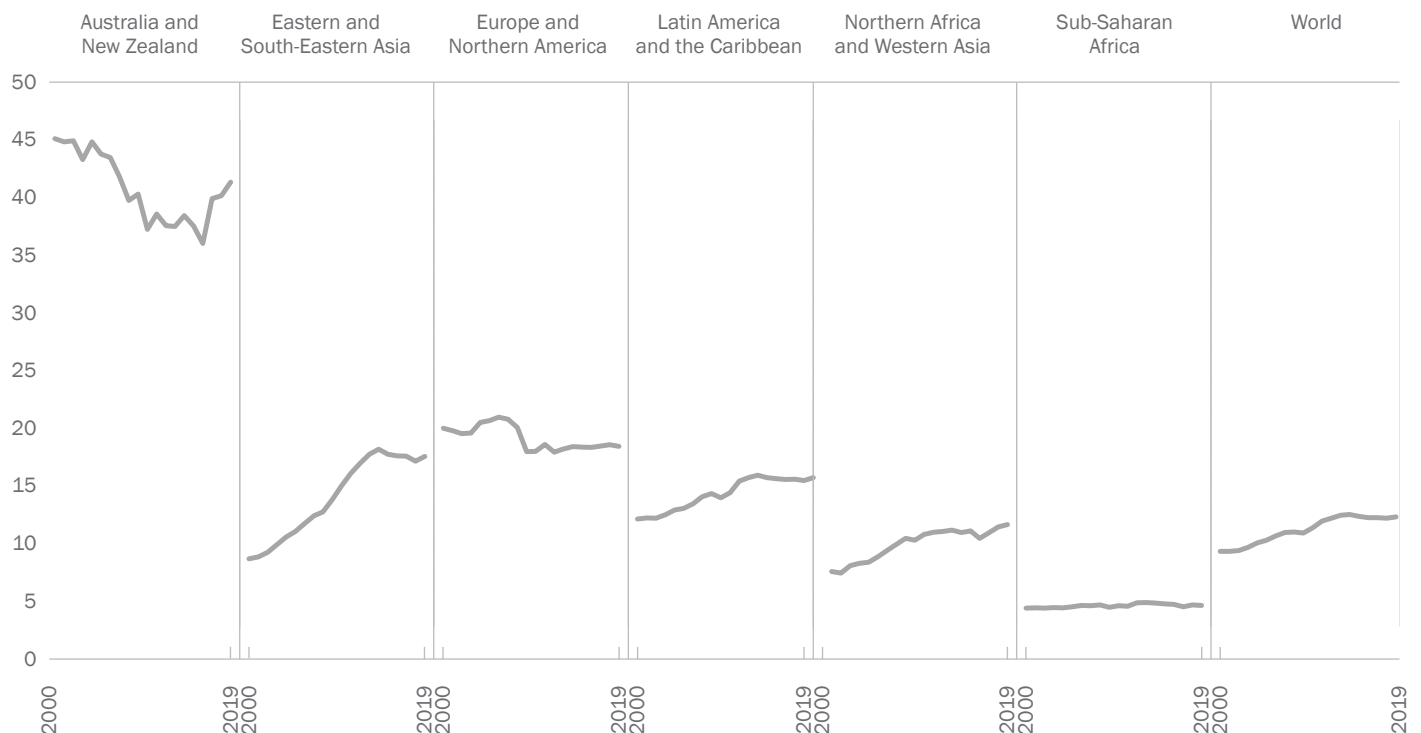
rhetoric that emphasizes the positive opportunities of connecting surplus labour or small producers in the global South with the opportunities of the global economy.<sup>85</sup> Value chains cross borders and are an entry point to analyse global interdependencies in social inequalities, for example, the unequal distribution of value and gains across locations and time, where local populations bear the environmental and social costs of resource extraction, which often creates protest and resistance.<sup>86</sup> The creation of GVCs is a form of disembedding whereby production is divorced from the regulatory regimes of consumer countries,<sup>87</sup> reconfiguring local contexts.<sup>88</sup>

MNCs often play key roles in GVCs, building their dominant market position on the invention and application of new technologies and frequently occupying dominant positions in national economies. In 2020, the top 50 companies in the world accounted for 28 percent of global GDP (adding USD 4.5 trillion of stock market capitalization in 2020), a sharp increase from 1990, when their share was less than 5 percent of global GDP.<sup>89</sup> While lead firms in GVCs mobilize vast political power to create those conditions and ensure that they are maintained,<sup>90</sup> developing countries have incentives

to keep costs low, in terms of both so-called red tape costs for producers and wages to attract foreign direct investment and increase exports.<sup>91</sup> For many states, these outcomes emerge from the significant asymmetries of political and bargaining power that exist between their governments and transnational (and some local) firms. For others, coercive pressures may be less pronounced, but the competitive dynamics of the global economy and the demands of economic development push in the same direction, as countries seek to signal investor-friendly policies.<sup>92</sup> In practice, power dynamics can be even more complex, as an analysis of the garment sector in Bangladesh shows.<sup>93</sup> Different stakeholders in this particular GVC display different views on the responsibility and decision space of lead firms, supplier firms, worker organizations and national governments to increase workers' safety and labour standards, reflecting the need to better enforce global regulations and to support broad-based actor coalitions.<sup>94</sup>

GVCs are pervasive in low-technology manufacturing, such as textiles and apparel, as well as in more advanced industries such as automobiles, electronics and machines.<sup>95</sup> Their hierarchical division of labour

**Figure 3.8 Domestic material consumption per capita, 2000 to 2019 (metric tonnes per capita)**



Source: UN DESA 2021.

generates high competition at the lower value-added stages of production, where low wages and profit margins prevail for workers and suppliers operating out of export processing zones located in the global South. At the top of the hierarchy, economic rents are high and competition is centred on the ability to monitor and control intangible assets related to innovation, finance and marketing.<sup>96</sup>

Developing countries' role in GVCs also has disadvantages in environmental terms:<sup>97</sup> current GVCs dominated by developed-country MNCs often lock in developing countries' part of the GVC to more carbon-intensive (energy-intensive) but lower value-added commodity extraction and production (mining and agriculture), partly driven by the offshoring of carbon-intensive and greenhouse gas-emitting industries to developing countries, a process that started in the early 1980s.<sup>98</sup> The rising domestic material consumption per capita in developing countries (see figure 3.8) is mainly due to industrialization connected to GVCs, with developed regions outsourcing material-intensive production and so reducing their own material consumption.

The increasing economic and political dominance of large global corporations and the associated adverse economic, social, environmental and political impacts have increased concerns over the failure of governments to address market concentration and to better regulate markets, level the playing field between countries and different types of companies, protect the state from capture by business interests, institutionalize corporate social and environmental responsibility as a legal obligation, and change the way corporate performance is measured and valued, which in its current form is not providing the incentives required to change business behaviour in line with the envisaged sustainability transition. While evidence-based proposals exist to reform the global business model, which we discuss in greater detail in chapter 5, these proposals still need to gain traction in a context where neoliberal hyperglobalization and financialization continue unabated.

Inequalities along GVCs have increased through financialization,<sup>99</sup> "the increasing role of financial motives, financial markets, financial actors and financial institutions in the operation of the domestic and international economies."<sup>100</sup>

Financialization, a process that has accelerated during neoliberal globalization (see chapters 1 and 2) transforms valuation processes of social, cultural or environmental activities and assets, separating a resource from its material value and separating the user from the resource.<sup>101</sup> Financialization subordinates the needs of the real economy to the motives and expectations of global financial markets and investors.

Through financialized GVCs, some countries provide commodities and struggle to earn profits from this activity, while others, which are specialized in service provision and trade and move these commodities from sites of extraction or cultivation to sites of production or consumption, rake in huge profits in the process. While the consequences of financialization are manifold, one common thread is the increasing power of capital owners. This power translates into pressure for companies to perform in relation to indices; it changes the relation between "physical" and "speculative" trade; it shifts the power balance between workers and managers in collective bargaining agreements; and it further erodes the capacity of both Southern and Northern countries to effectively regulate their markets.<sup>102</sup>

Financialized GVCs have significant impacts on the environment and local communities where the sites of production are situated. They directly touch the lives of various actors throughout the chain, from consumers unable to afford or access needed commodities, to local producers whose livelihoods are compromised, to workers participating in the industry under lax labour regulations, to local communities facing impacts such as displacement, pollution and environmental degradation.<sup>103</sup> GVCs have strong implications for gendered social development outcomes, in particular in the global South (see box 3.3).<sup>104</sup> Further, such processes serve to accelerate the plundering of the commons (see Spotlight by Guy Standing), as farmlands, forests, mines and even oceans become privatized and extracted.<sup>105</sup> This buying up has profound consequences, transforming local landscapes and the ways of life that depend on them and producing negative environmental impacts on said communities.

Added to this, global commodity trade is marked by a lack of supply chain transparency, regulations or accountability to local governments. In fact,

### Box 3.3 Gender implications of transformations of the copper value chain in Zambia

Copper is deeply woven into the social, economic and political fabric of Zambia.<sup>a</sup> Over the last decades, Zambia has seen profound transformations of the sector driven by the privatization of the previously state-owned copper enterprise Zambia Consolidated Copper Mines (ZCCM) in 1997 and the increasing financialization of the copper value chain during the period of hyperglobalization. Economic dependency on the commodity is high: the country is the seventh largest copper producing nation in the world,<sup>b</sup> mining accounts directly for 10 percent and indirectly for up to 50 percent of its GDP, while the copper trade constituted 77 percent of its total exports in 2019, making it the country most dependent on copper exports in the world.<sup>c</sup> Fiscal revenues from mining have increased from very low levels after privatization of the mining sector, contributing around 28 percent of government revenue in 2019.<sup>d</sup> The sector contributed 2.4 percent of total employment in 2019, down from 15 percent in 1990 when the mining sector was still owned by the government.<sup>e</sup>

Although Zambia reached middle-income status in 2011 after years of commodity-driven income growth, it simultaneously experienced worsening social outcomes, from poverty to rising inequalities. Between 2002 and 2010, the Gini coefficient increased from 0.42 to 0.56, the consumption share of the poorest 10 percent fell from 6.1 percent to 3.8 percent, while the share of the richest decile increased from 33.7 percent to 45.2 percent.<sup>f</sup> These tendencies have not changed greatly over the past decade, with poverty rates remaining at a level of 60.1 percent of the population in 2020 (USD 1.9 PPP in 2011).<sup>g</sup> Thus, economic growth driven by increases in copper prices did not translate into improved conditions for the majority of the population. Instead, it intensified the erosion of standards of living and safety nets.<sup>h</sup> These effects were especially visible in the case of the copper mining sector, affected by profound restructuring through privatization and financialization. The shift toward greater profit orientation of privatized companies acted to the detriment of workers' welfare, while private companies did not provide the same investments into social services and infrastructure compared to ZCCM. In combination with an international context characterized by rapid technological progress and rising price volatility, these changes resulted in increasing job losses and employment insecurity and precarity (moving from permanent contracts toward subcontracted, temporal and precarious jobs), rising indebtedness of mine workers, erosion of social protection and continued exposure to negative environmental impacts.<sup>i</sup>

An UNRISD study<sup>j</sup> conducted as part of the international project *Valueworks: Effects of Financialization along the Copper Value Chain*<sup>k</sup> analysed the gendered implications of the transformations of the copper value chain in Zambia's Copperbelt. It finds that historically, women have been excluded from most direct mining activities, seen as an ultra-masculine domain, due to societal norms, restricting them to household responsibilities such as domestic and care work and informal activities. However, economic restructuring of mining operations engendered, in some instances, gradual changes in gender stereotypes and the household division of labour. Economic insecurity and the loss of jobs of the traditional male income-earner has allowed women to venture outside the home in search for income, which can result in greater economic empowerment of women. Despite these recent gains in women's workforce participation, societal perceptions of gender roles, especially in mining communities, still shape their job opportunities, such as women unable to access high paying jobs in mining and being mostly considered for clerical and administrative jobs corresponding to stereotypes of female employment. Overall, employment conditions have worsened for both women and men of the Zambian Copperbelt while the Covid-19 pandemic has resulted in further hardships and rising inequalities, as well as the renationalization of the Mopani copper and cobalt mines previously owned by the Swiss multinational Glencore, opening new opportunities but also risks in a volatile international environment.<sup>l</sup>

<sup>a</sup> Hinfelaar and Achberger 2017; Hujo and Lupo 2022; <sup>b</sup> World Bank 2021a; <sup>c</sup> EITI 2017, 2020; UNCTAD 2017; <sup>d</sup> EITI 2020; <sup>e</sup> UNCTAD 2017; <sup>f</sup> UNCTAD 2017; <sup>g</sup> World Bank 2021b; <sup>h</sup> Cheelo et al. 2022; <sup>i</sup> Musonda 2021; Nchito 2018; <sup>j</sup> Haile 2020; <sup>k</sup> Kesselring et al. 2019; <sup>l</sup> Kesselring 2021.



corporations have a disproportionate amount of influence over governments in producing countries, as labour and environmental protections come down in the hopes of attracting more investment. This also has profound impacts on local lifeworlds, relating to employment and protections, access to resources for subsistence and income earning, availability and affordability of needed commodities, and cleanliness and safety of one's living environment, impoverishing communities and deepening inequalities (see box 3.3).

Globalization of value chains is furthermore associated with various inequalities in agricultural and food systems in rural and semi-rural areas.<sup>106</sup> First, GVCs shift production patterns away from local needs to the needs of global markets. As a result, local consumers lose access to important resources, and community needs go unmet, either because the new commodity prices reflect global market prices and are financially out of reach of local communities, or because their production has been replaced with one chosen for its value and demand on the global market rather than local ones. Further, while the underlying logic supporting globalization includes its role in linking local farmers to GVCs, many of the opportunities are seized by big corporations in partnership with large-scale farmers owning large tracts of land and having significant control over resources. Food is being seen as a strategic asset; this is resulting in new waves of land, ocean and resource grabs.<sup>107</sup> Although there are many economic forces at play in the global food market, many of its components are controlled by a relatively small number of actors alongside whom smallholder farmers have little institutional, legal or financial support.<sup>108</sup>

Furthermore, global trade encourages corporate farming for export, promotes monoculture and can lead to import dependence for basic food resources. Many countries in Africa that have intensively commercialized agriculture have seen their dependence on food imports increase as farmers switch to export-oriented cash crops.<sup>109</sup> While this is not unusual in a globalized world and only four countries are actually net importers (Angola, the Democratic Republic of the Congo, Nigeria and Somalia)<sup>110</sup> the 2008 world food price spike again highlighted the importance of locally grown food, as did the outbreak of Covid-19 and the current Russia-Ukraine war, which led and could lead to significant interruptions in food supply chains.



## **Corporations have a disproportionate amount of influence over governments in producing countries, as labour and environmental protections come down in the hopes of attracting more investment.**

GVCs integrated into agricultural and food systems are also accentuating inequalities through their negative impact on local environments. Corporate farming is resource intensive, often with excessive chemical content and overextraction of local biological resources. The cost associated with this resource degradation and contamination is borne by small farmers who depend entirely upon resources available in nature. Since women predominate among small farmers, gender inequality in farming is also exacerbated.<sup>111</sup> Furthermore, consumption patterns and dietary preferences are considerably influenced by market advertising driven by corporatist agendas. Nearly all developed countries and a growing number of developing countries prefer land- and water-intensive food, with very high environmental costs. This in turn is leading to environmental degradation, climate change, social inequality and poverty.<sup>112</sup> Here again, inequality is reproduced because the cost of environmental degradation is borne most by those who are directly dependent upon surrounding environmental resources.

Finally, GVCs could also increase between-country inequalities, as they emerge from and reproduce unequal roles in the global division of labour.<sup>113</sup> While some large developing countries, such as China and India, have strong positions in certain GVCs, most developing countries are integrated in GVCs with low value-added production activities with small profit margins. This serves to further

entrench economic power imbalances that are inherent to global production networks and create disparities between regions and countries. It also drives both internal and international migration and urbanization, as opportunities for livelihoods dwindle in rural areas, and plays a significant role in global patterns of labour migration from South to North.

## 4. Social Inequalities: How Social Injustice Threatens the Social Fabric

### 4.1 Why we should care about social inequality

Indigenous peoples are three times more likely to live in extreme poverty compared with non-Indigenous groups.<sup>114</sup> Even before the Covid-19 pandemic upended opportunities for many, young people were three times more likely to be unemployed than older workers and twice as likely to live in extreme poverty.<sup>115</sup> Only 28 percent of persons with severe disabilities receive disability cash benefits.<sup>116</sup> Black women in the United States are three to four times more likely to die from complications from pregnancy than white women (see box 3.5).<sup>117</sup>

Social or horizontal inequalities, defined as disadvantages related to group status as illustrated above, compound economic inequality, resulting in entrenched structures of stratification which constrain people's life choices and well-being, undermining social cohesion, democracy and economic development. Social inequalities in combination with poverty and other economic deprivations tend to manifest as social exclusions which are hardwired but not immutable.<sup>118</sup>

Social inequalities are also reflected in differences in capabilities, for example, inequalities in employment, health, education, housing, nutrition, security, power, assets and so forth.<sup>119</sup> They reflect social hierarchies or social positions which determine access to goods, status and power.<sup>120</sup> When based on discriminatory rules and practices, they not only violate human rights but also have a negative effect on the economy, depriving people of their

opportunities to participate in economic activities on equal terms. Real or perceived discrimination and grievances related to markers of identity, such as gender, sexuality, race, ethnicity or religion, to name a few, can fuel discontent and even result in violent attacks and conflict, threatening the social fabric and unraveling social contracts.<sup>121</sup> They also lead to power asymmetries that influence political systems and decision making (see section 5 on political inequalities).

### 4.2 Social inequalities: Where do we stand?

How have horizontal inequalities evolved over recent decades, and what is the current situation? In this section we present data on how different social groups are affected by income and multidimensional poverty and analyse disaggregated social outcomes for nutrition and hunger, exposure to violence, education and health services, access to social protection and employment.

#### 4.2.1 Poverty and social inequalities

In recent decades, the world has made substantial advances toward eradicating extreme poverty, advancing human well-being and building capabilities; but extreme deprivations persist, especially for



**Extreme poverty is concentrated among disadvantaged groups, and the limitations to their opportunities and capabilities are often linked to deeply rooted structures of social and political inequality, as well as discriminatory laws and social norms.**

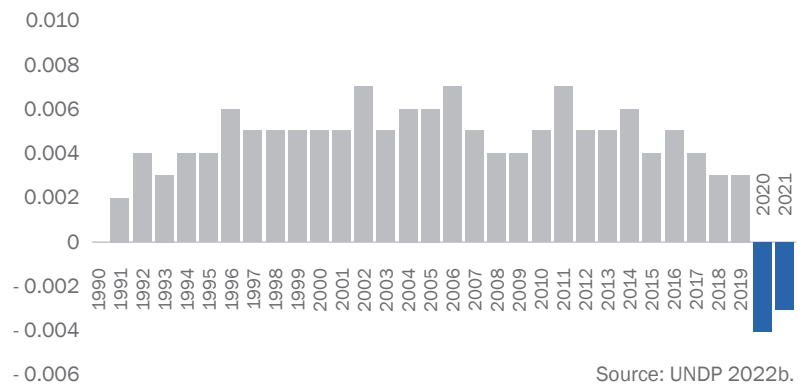
disadvantaged social groups, and progress varies significantly between world regions. In 2020, the Covid-19 pandemic disrupted implementation of many of the SDGs, while the Russia-Ukraine war has upended a fragile global economic recovery, threatening to reverse years of progress on poverty, health care and education.<sup>122</sup>

Women, children, youth, older people, persons living with disabilities, migrants, Indigenous peoples and LGBTIQ+ persons, among other groups, often experience lower levels of well-being within a population, especially when their condition is intersecting with poverty.<sup>123</sup> Social inequality based on group identity exacerbates poverty and limits access to fundamental rights. Lack of access to water and sanitation, higher risk of disease contagion, food insecurity and land deprivation are some of the factors that have amplified inequality during the Covid-19 crisis.<sup>124</sup> Indigenous peoples suffer lack of access to appropriate public health systems, were not properly considered in the formulation of confinement measures and had limited access to preventive information, such as updates about the disease in culturally and language-pertinent formats.<sup>125</sup>

Extreme poverty is concentrated among disadvantaged groups, and the limitations to their opportunities and capabilities are often linked to deeply rooted structures of social and political inequality, as well as discriminatory laws and social norms.<sup>126</sup> In many countries, children are proportionately more affected by poverty than the general population because poorer households tend to have larger families, including in high-income countries where around one in seven children are deprived.<sup>127</sup> An estimated 80 percent of persons with disabilities live in poverty. Refugees and migrants also face numerous barriers to secure their livelihoods and social rights.<sup>128</sup>

On the positive side, the number of people living below the monetary thresholds of USD 1.90 per person per day has been declining for years (driven to a large extent by China and India), marking progress toward SDG 1.<sup>129</sup> However, headcount figures remain high, and almost half of the world population lived below USD 5.50 per person per day in 2017.<sup>130</sup> Even before the Covid-19 pandemic,

**Figure 3.9 Global Human Development Index with and without Covid-19**



the pace of global poverty reduction was decelerating and was not on track to realize the global target of ending poverty by 2030.<sup>131</sup>

Multidimensional poverty including poor health (measured, for example, in terms of child mortality or nutrition indicators) and education (measured in years of schooling and enrolment), as well as inadequate living standards (related to access to water, sanitation, electricity, cooking fuel and other assets) reinforce each other and constrain people's freedoms and capabilities.<sup>132</sup> In 2018, 1.3 billion people in 105 countries lived in households with multidimensional poverty characteristics or overlapping deprivations. As a result of the Covid-19 crisis, the Human Development Index, a combined measure of education, health and living standards, is on course to decline for two consecutive years since the measurement began in 1990 (figure 3.9).<sup>133</sup>

Already before the pandemic hit, research on human development detected divergence in enhanced capabilities between countries, for example, life expectancy at older ages or share of adults with tertiary education, compared to convergence in basic capabilities such as primary education.<sup>134</sup>

The pandemic has disproportionately affected vulnerable groups and further exacerbated existing disparities.<sup>135</sup> The gap between the numbers of men and women who live in poverty has widened<sup>136</sup> and an estimated 100 million children fell into poverty during the pandemic.<sup>137</sup> Around five million children are estimated to have been orphaned because of the death of a parent or caregiver due to Covid-19.<sup>138</sup>

### Box 3.4 Protecting and supporting vulnerable groups through the Covid-19 crisis

An UNRISD survey on “Protecting and Supporting Vulnerable Groups Through the Covid-19 Crisis” conducted in April–July 2020 with academics and practitioners from 82 countries worldwide highlighted the need for policy responses that are sensitive to the specific characteristics, locations and needs of vulnerable groups, especially the working poor, as well as older persons. In low- and lower-middle-income countries, lockdowns and physical distancing were perceived as less effective if not accompanied by social and economic support policies such as food distribution. The importance of establishing employment programmes for vulnerable people such as migrant workers, daily wage labourers and youth was highlighted in Belgium, Costa Rica, India, Mexico, Palestine, South Africa and the United States. Inclusive social protection programmes for people living with disabilities and older persons were emphasized in Indonesia, Myanmar, Nigeria and the United Kingdom. Beyond governments, non-state actors including faith-based groups, trade unions, the private sector and other non-governmental organizations have provided essential support and services in some countries, especially for vulnerable groups. This has included the provision of food and protective equipment, public information campaigns, transporting older persons to clinics, mental health services and support for women and children.

Source: Ladd and Bortolotti 2020.

effects of and supply chain disruptions associated with Covid-19, the number of food-insecure people may have doubled in 2020, to 265 million people.<sup>142</sup> Estimates of both hunger and severe food insecurity were revised upward in 2020, with the Covid-19 pandemic adding between 83 and 132 million people to the total number of undernourished in the world.<sup>143</sup> Around 370 million children missed out on school meals due to school closures in spring 2020 in countries both rich and poor. In 2020, the WFP estimated that due to the pandemic, by the end of the year the number of people experiencing extreme hunger would increase by 82 percent compared with 2019,<sup>144</sup> with hunger increasing in existing “hot spots” but also popping up in new ones.<sup>145</sup> Concerns about hunger and food insecurity are further increasing in the more recent context of blocked grain exports from Ukraine and Russia as well as price hikes and supply chain disruptions related to various goods, including energy and fertilizers, in the context of the war.<sup>146</sup>

Children are in fact among the hardest hit because their potential for growth is compromised and the impacts will be lifelong, diminishing opportunities across the life course. Increasing numbers of children are becoming malnourished due to the deteriorating quality of their diets, interruptions in nutrition and other essential services, and the socioeconomic shocks created by the pandemic in low- and middle-income countries.<sup>147</sup> The pandemic is leading to multiple forms of nutrition failure for children, including stunting, wasting and micronutrient deficiency.<sup>148</sup>

#### 4.2.2 Hunger and nutrition

Social inequalities are also highly visible when looking into food security, hunger and nutrition indicators:<sup>139</sup> our current food and nutrition systems are marked by inequality and injustice, and hunger and malnutrition are unacceptably high with marked differences between countries, within countries and by population characteristics.<sup>140</sup> Even in advanced countries there are pronounced racial, ethnic and socioeconomic inequities in undernutrition and overnutrition, as well as in micronutrient deficiency.<sup>141</sup>

The outbreak of Covid-19 and its aftermath have further compounded the food and nutrition challenge. Recent World Food Programme (WFP) projections indicate that, because of the economic

#### 4.2.3 Violence

Social inequalities are also visible with regard to violence. There are a number of factors that can heighten one’s risk to violence, including poverty and economic distress, cultural norms, conflict and displacement, weak safety net services, age, and racial, ethnic and gender inequality.<sup>149</sup> Globally, 35 percent of women have experienced physical and/or sexual intimate partner violence, or sexual violence by a non-partner.<sup>150</sup> Every year, more than 1.7 billion children around the globe experience emotional, physical or sexual violence in homes, communities, schools, workplaces, detention centres, institutions and online.<sup>151</sup> Exposure to violence and lack of physical safety is clearly related to intersecting forms of inequality and the lack of power victims of violence are experiencing, a situation that requires

integrated approaches to strengthen the agency of affected groups, access to support and protection services, as well as preventative action and awareness raising.<sup>152</sup>

Sexual and gender-based violence is ubiquitous and touches people of all genders in all corners of the world. One in three women and girls experience sexual assault or intimate partner violence in their lifetime.<sup>153</sup> Boys in many countries in the world are dropping out of school because of harsh disciplinary measures, corporal punishment and bullying.<sup>154</sup> However, overlapping vulnerabilities render certain groups at greater risk, such as living in a low-income/marginalized neighbourhood,<sup>155</sup> having a low level of education and living in situations of conflict.<sup>156</sup>

Employment in certain kinds of work that are overwhelmingly made up of women entails higher vulnerability. Domestic workers are more vulnerable to violence in the workplace for a number of reasons, including the private nature of their work (which means abuse usually goes unseen), the difficulty of network building, and, in the case of migrant domestic workers, reluctance to go to authorities because of language barriers or fear of being deported.<sup>157</sup>

Sex work is another site in which gendered vulnerability intersects with labour insecurity to lead to violence. A systematic review of violence against sex workers globally concluded that between 45 and 75 percent of sex workers have experienced workplace violence. The report identified various factors that led to increased risk of violence against sex workers, including migrant status, debt, residential instability, homelessness, lack of education and inability to organize.<sup>158</sup>

In certain settings, LGBTIQ+ people are particularly vulnerable to gender-based and sexual violence. As the Office of the United Nations High Commissioner for Human Rights (UN OHCHR) report (2011) presented to the 19th session of the Human Rights Council lays out, attacks on people because of their sexual orientation or gender identity “constitute a form of gender-based violence, driven by a desire to punish those seen as defying gender norms.” Official data on homophobic and transphobic violence are scarce due to the fact that few countries have in place systems to record and report hate crimes, and even where they do exist there are many barriers to

proper reporting, for example, stigma that causes people not to come forward, or fear of or lack of trust in the police.<sup>159</sup> However, the data that do exist present a grim picture. Between 2008 and 2021, over 4,000 murders of trans persons in 80 countries were documented by the Trans Murder Monitoring project, with 24 percent being sex workers.<sup>160</sup> In the United States, LGBT<sup>161</sup> people (16+) are nearly four times more likely to experience violent victimization compared with non-LGBT people.<sup>162</sup> Survey results from Europe show similarly high levels: in the five years before the survey, 58 percent experienced harassment and 11 percent were physically or sexually assaulted because they were LGBTI. Of those who experienced acts of violence, only 21 percent reported them to any organization.<sup>163</sup> State-sanctioned violence against LGBTIQ+ persons is also growing, with laws prohibiting or discriminating against same-sex relationships popping up in places such as Ghana, Hungary and Poland, to name a few, leading to increased violence.

Race is also a highly relevant factor determining vulnerability to violence. Racial violence, with historical legacies deeply rooted in colonialism and slavery, seems to be on the rise in recent

**The material and symbolic consequences of racism must be treated as defining elements of the political agenda. The institutional and power structures that fuel racism must be transformed.**

– *Jailson de Souza e Silva*  
General Director,  
Instituto Maria e João Aleixo (IMJA)



years. In the US, racially motivated hate crimes increased by 25 percent between 2019 and 2020.<sup>164</sup> In Brazil, between 2001 and 2011, homicide rates of Black Brazilians increased by 67 percent, while that of white Brazilians decreased by 52 percent (see Spotlight by Jailson de Souza e Silva).<sup>165</sup>

One of the most chronic forms of racial violence is the disproportionately high rates of killings of persons of colour by police.<sup>166</sup> In the United States, police violence is the leading cause of death for young men, and Black, Indigenous and people of colour (BIPOC) are statistically more likely than their white counterparts to be killed by police, topping out at 2.5 times as likely in the case of Black men.<sup>167</sup> In 2018, 75 percent of victims of police violence in Brazil were Black or mixed race, while they only represented 55 percent of the population.<sup>168</sup> In Brazil, police killings are on the rise, increasing by almost 20 percent in the year 2018.<sup>169</sup> Numerous studies in both countries reveal significant racial bias in police forces and discount the idea that racial disparities in police killings are fully attributable to the overrepresentation of persons of colour in impoverished communities.<sup>170</sup>

In the last decade, with the almost ubiquitous use of smartphones, acts of racial violence have become more and more visible, sparking public outrage.<sup>171</sup> Citizen recordings of police officers killing (often unarmed and detained) Black men, including Eric Garner, Alton Sterling and George Floyd, among many others, fueled the Black Lives Matter movement, triggering a series of protests across the nation and the world.<sup>172</sup> In Brazil, the 2018 assassination of Marielle Franco, a Black queer activist and local city councilor in Rio de Janeiro who campaigned against police brutality, racism and neglect of poor communities, sparked national protests, international condemnation, as well as a larger debate in the country about legacies of police brutality directed largely at poor Afro-Brazilians.<sup>173</sup> These movements have also led to backlash that in turn has triggered more racial violence, for example in the form of white nationalist counter-movements and targeted attacks on Black establishments, including a church in Charleston, South Carolina in 2015<sup>174</sup> and a supermarket in Buffalo, New York in 2022.<sup>175</sup>

Racial violence also takes shape on a global scale, for example with regular violent attacks on migrants, refugees and ethnic/racial minorities driven

by xenophobia and racism in several European countries, but also in countries such as South Africa,<sup>176</sup> and the recent rise of anti-Asian violence in the wake of the Covid-19 pandemic. Since the pandemic began, reports of anti-Asian violence have increased across the world, including attacks, beatings, threats and racist abuse.<sup>177</sup> UN Secretary-General Antonio Guterres called on governments to “act now to strengthen the immunity of our societies against the virus of hate” following what he described as “a tsunami of hate and xenophobia, scapegoating and scare-mongering.”<sup>178</sup>

#### 4.2.4 Education

Access to quality education in early childhood, as well as primary, secondary and higher education, are essential to build capabilities for all.<sup>179</sup> Disparities in access to education have negative implications for inequality because they have an important role to play in perpetuating inequality over the life course and intergenerationally. Years of schooling are strongly correlated with future earnings and therefore play a crucial role in social mobility.<sup>180</sup> In fact, one of the strongest predictors of educational attainment is parental education level, with particularly strong correlation in low-income countries.<sup>181</sup> One study found the chances of upward social mobility in education are on average twice as high in high- and upper-middle-income countries than in low-income countries.<sup>182</sup> The 2030 Agenda for Sustainable Development aims (inter alia) “to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all,” including equal access to affordable technical, vocational and higher education (SDG 4, target 4.3). In addition, target 8.6 demands a substantial reduction in the proportion of youth not in employment, education or training by 2020.



**Intersecting vertical and horizontal inequalities determine to a significant degree who can access higher education and which institutions, and on what terms.**

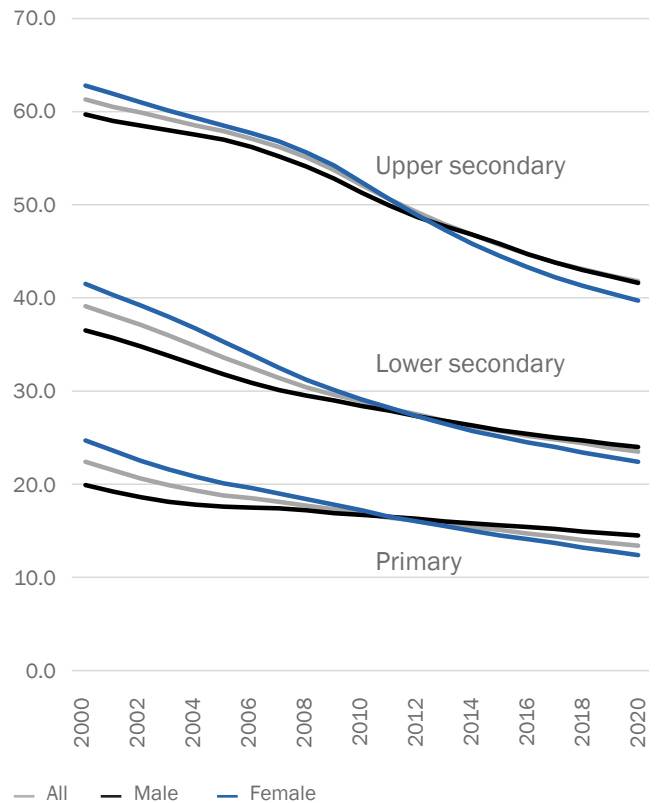


Before the pandemic interrupted regular school services some achievements were made (although quality of education services remained a challenge), with the proportion of children and youth not in primary or secondary school declining from 26 percent in 2000 to 19 percent in 2010 and 17 percent in 2018 (figure 3.10). And while girls have made big strides in overcoming gender inequalities in education, new gender disparities are arising, as girls have outperformed boys over the last decade at the primary and secondary level (figure 3.10), prompting new research on why boys have been increasingly disengaging with education.<sup>183</sup> In the past year, school closures to stop the spread of Covid-19 have affected the vast majority of the world's student population.<sup>184</sup> In 2020, more than 190 countries implemented nationwide school closures and about 90 percent of all children and youth (1.6 billion) were out of school and university for at least part of the year with learners hit worst in countries that lack the electricity, Internet and computers necessary to switch to remote learning.<sup>185</sup> In India and Uganda, schools remained shut for around two years, representing a significant loss to the development of children, especially those from underprivileged families that do not have access to the Internet.<sup>186</sup> Educational prospects could be further undermined by a projected increase in child labour: the impacts of Covid-19 threaten to push an additional 8.9 million children into child labour by the end of 2022, as families send children out to work in response to job and income losses.<sup>187</sup>

The digital divide is widening education equality gaps.<sup>188</sup> Before the pandemic almost one-third of the world's young people were already digitally excluded. Although distance learning solutions have been provided in four out of five countries with school closures, at least 500 million children and youth in vulnerable and disadvantaged communities remain excluded from these options.<sup>189</sup>

Intersectionality plays an important role for educational outcomes: there are significant gaps in education quality and access between countries and along gender, class and regional lines. Fifty-three percent of children who do not attend primary school are girls. In many countries in Latin America and sub-Saharan Africa, more than half of students who complete primary school fail to attain basic numeracy and literacy skills. In sub-Saharan Africa, only 55 percent of primary school teachers are trained. The increased privatization of education

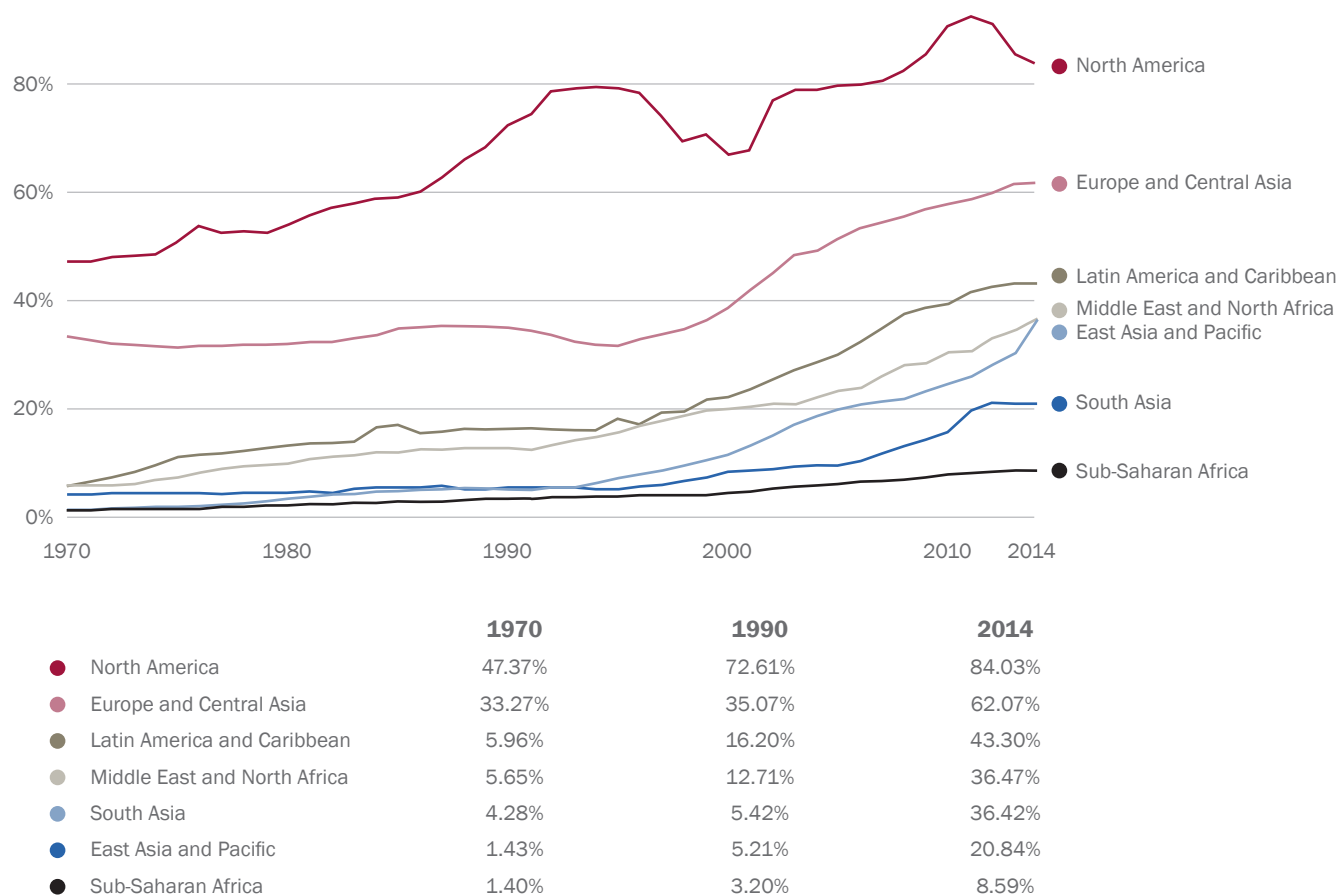
**Figure 3.10 Proportion of children and youth who did not complete primary, lower secondary and upper secondary school, 2000 to 2020**



Source: UN DESA 2021.

in some contexts contributes to a massive disparity in quality of education between the poor and the wealthy, increasing pressure on already struggling education systems.<sup>190</sup>

As mentioned above, despite significant progress in basic capabilities in education in pre-pandemic times, advanced capabilities have been harder to expand. They are especially relevant when applying an inequality lens that goes beyond poverty and investigates questions of social mobility and elite power. Higher education (HE), historically a privilege of elites, is now recognized as a key to social mobility and greater equality across gender and race, empowering disadvantaged groups and increasing their labour market opportunities.<sup>191</sup> A quality public higher education system as part of a comprehensive national education system is also crucial for structural change, nation building, social cohesion and state capacity. Training civil servants and highly skilled professionals working in public services, such as teachers and medical staff, are strategic objectives in this regard that had been sidelined during the

**Figure 3.11 Evolution of gross enrolment ratio in tertiary education by world regions, 1970–2014**

Source: Lebeau and Oanda 2020. Based on data from UNESCO Institute for Statistics database.

periods of structural adjustment and neoliberal reform. During that time public universities were most affected through spending cuts, at the same time as enrolment numbers increased, resulting in falling standards of education and poor working conditions for staff.<sup>192</sup>

In the past several decades efforts to expand HE have swept the world, and globally more than one-third of secondary school leavers are now absorbed into some form of HE, up from one-fifth in 2000.<sup>193</sup> But these increases are not evenly distributed across countries. The average gross enrolment ratio is just 9 percent in low-income countries (see figure 3.11), and many global South countries lack not only financial resources to improve this figure but also qualified staff, with many of their best academics leaving for institutions in the global North.<sup>194</sup>

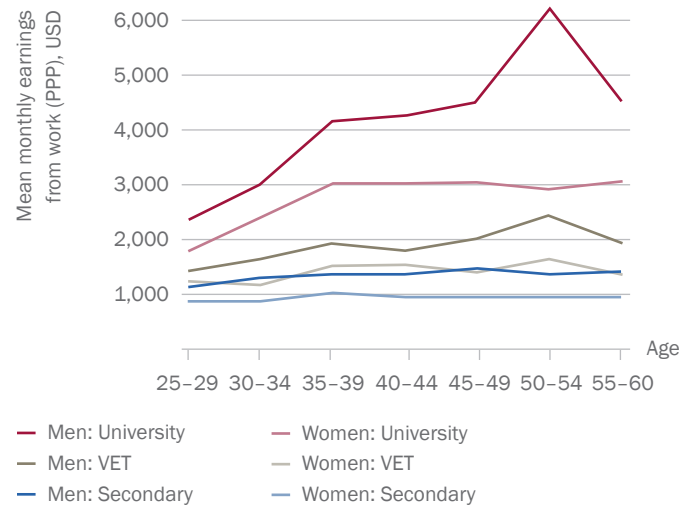
In addition to these disparities between countries, inequalities abound within countries as well, even where enrolment has risen markedly. In many cases, expansion in systems of HE not only reinforce old inequalities but also create new ones. The increased participation in tertiary education has not necessarily been accompanied by sufficient formal employment opportunities for new labour market entrants, a situation that has worsened during the current Covid-19 pandemic.<sup>195</sup> Further, the demand for HE in many places in the global South has exceeded the capacity of public educational institutions, which experienced budget cuts during structural adjustment and subsequent fiscal crises (chapter 2). Growing demand has largely been satisfied by private providers, with impacts on affordability and accessibility.<sup>196</sup> Indeed, data indicate a sharp divide in the developing world in terms of access, with rich students overwhelmingly outnumbering poor

students in terms of attendance rates, and those students from disadvantaged social groups much more likely to attend non-selective universities.<sup>197</sup>

Recent UNRISD research explored these questions in selected countries in Latin America and sub-Saharan Africa. It found that while *availability* of HE opportunities for school leavers and adult learners has increased over the past decades, countries in the global South are still lagging behind compared with the global North. The expansion of private or fee-paying HE as the main mechanism to expand availability of opportunities reflects both fiscal constraints and international trends toward commercialization of public services. This has highly detrimental impacts on access and equity in contexts where inequalities are high and most student cohorts are from low-income families. In contexts where pressures for cost recovery and meritocracy compete with equity concerns, *accessibility* has been improved through policies such as subsidized student loans and living support schemes, expansion of subsidized programmes in public universities, quota systems favouring racial minorities in competitive entry exams, expansion of tertiary education infrastructure outside of urban centres and distance education.

Low-income or poverty status continues to be the greatest obstacle to access, with some minority ethnic groups and women from better-off families having managed to access fee-paying HE. However, racial and ethnic minorities, low-income students, students from public secondary schools or with parents of low educational attainment, and those living in remote areas are still facing obstacles to access and completion, whereas female students are often overrepresented in less prestigious and lower-return study programmes and institutions, as well as in private fee-paying universities (with public no-cost universities in many countries being the most competitive and highest quality) and non-degree programmes. Women also tend to be enrolled in degree courses with lower earning potential. This, combined with inequalities in access to social capital including family networks, labour market segregation, care responsibilities and other disadvantages as described above, lead to lower returns for women compared with men (see figures 3.12 and 3.13). This points to shortcomings in terms of *horizontality*, uneven prestige and quality across the HE system, and potential for social mobility in HE in the global South. Intersecting vertical and horizontal inequalities determine to a significant

**Figure 3.12 Labour market returns to education by gender, Chile, 2017**

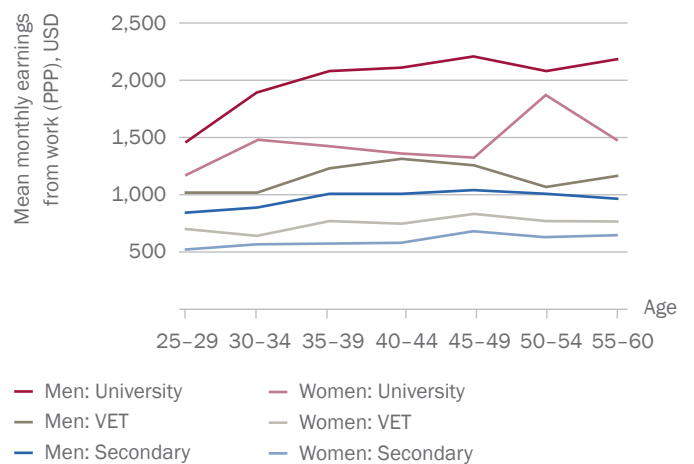


Source: Gaentzsch and Zapata-Román 2020. Based on: CASEN 2017.

Notes: The lines track mean earnings by age across different levels of educational achievement and for subgroups defined by gender, ethnic background, parental education and across educational tracks. In 2017, female labour market entrants at the age of 25–29 years earned an average earning of around USD 1,900 PPP with university education compared to around USD 2,200 PPP for male university graduates.

VET: vocational education and training

**Figure 3.13 Labour market returns to education by gender, Peru, 2017**



Source: Gaentzsch and Zapata-Román 2020. Based on: ENAHO 2017.

Notes: The lines track mean earnings by age across different levels of educational achievement and for subgroups defined by gender, ethnic background, parental education and across educational tracks. In 2017, female labour market entrants at the age of 25–29 years earned an average earning of around USD 1,200 PPP with university education compared to around USD 1,500 PPP for male university graduates.

VET: Vocational education and training

degree who can access HE and which institutions, and on what terms. This in turn shapes the outcomes of HE for future income earning capacity, labour market success and social status, and it prevents societies from harnessing the full potential of all their members and making the right to education a reality.

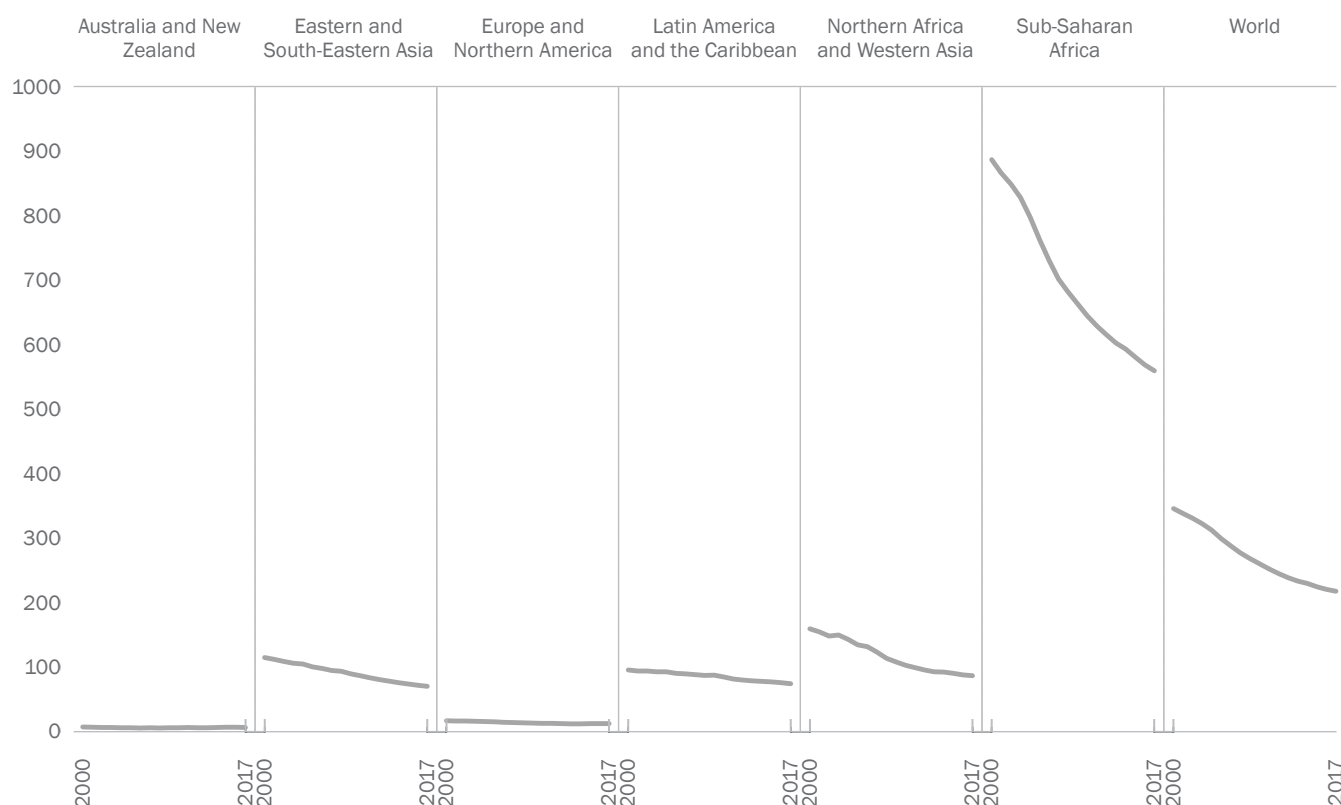
#### 4.2.5 Health

Physical and mental health are crucial to human well-being.<sup>198</sup> At the same time, inequalities are highly detrimental for health outcomes.<sup>199</sup> Significant advances in many areas of health were being made prior to 2019, though these still fell short of meeting many of the SDG 3 targets. Major progress has been made in maternal and child health (figures 3.14 and 3.15). By 2018, 121 countries had already met the SDG target on under-five mortality.<sup>200</sup> However, the pandemic is reversing gains in this area and others which were already under stress. It is estimated that disruptions to routine health services and constrained access to nutritious diets may have caused hundreds of thousands of additional under-five deaths and tens of thousands of additional maternal deaths in

2020.<sup>201</sup> The impacts of the pandemic on the psycho-emotional lives of young people are also severe, particularly in low- and middle-income countries, compounding existing disadvantages rooted in poverty, conservative gender norms, disability and refugee status. Empirical evidence from Ethiopia, Côte d'Ivoire and Lebanon, for example, shows increases in anxiety and stress, time poverty due to more household chores for girls, exploitative labour conditions for boys, increased exposure to violence and higher risk of child marriage in some places.<sup>202</sup>

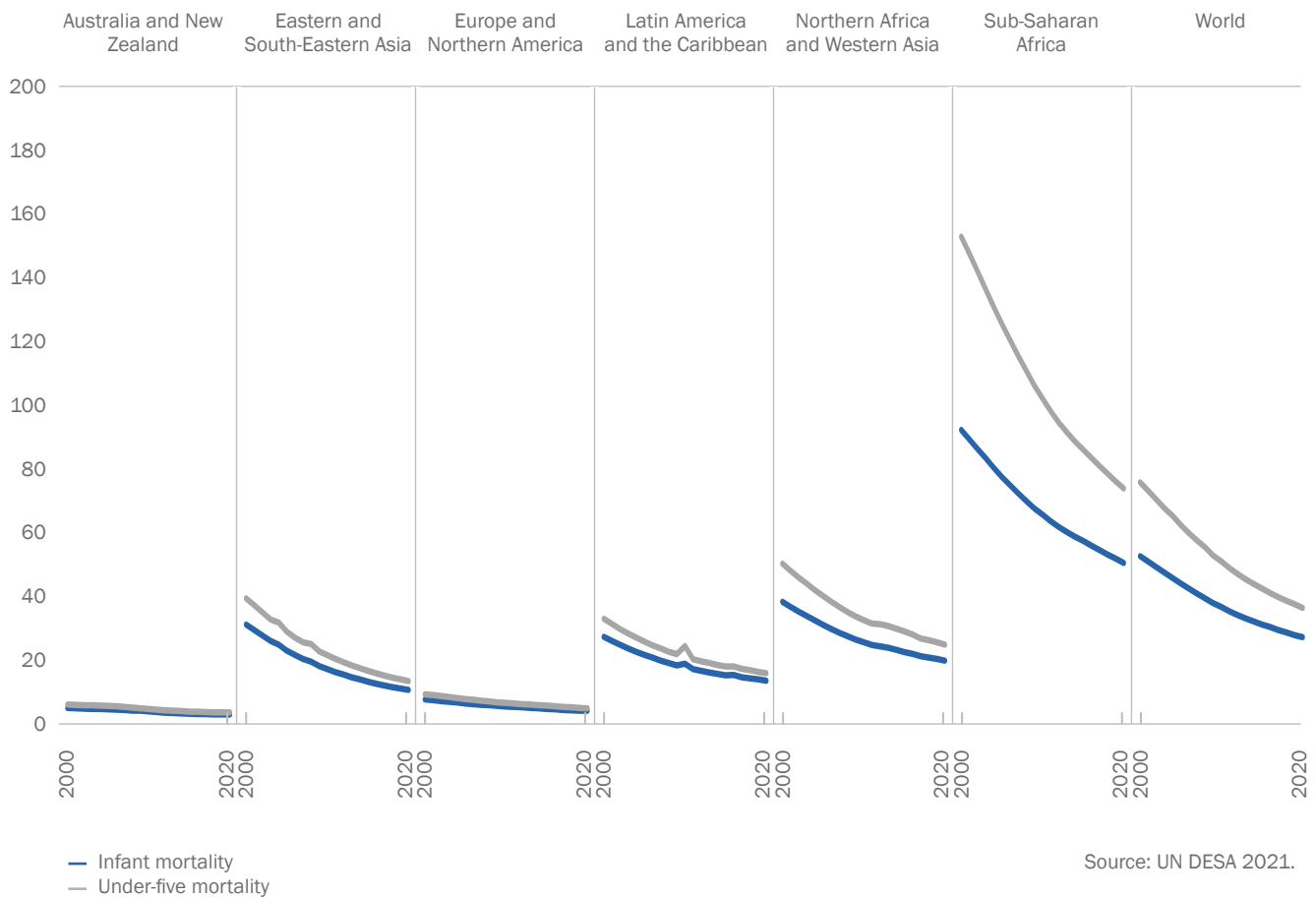
Despite some progress toward universal health coverage, the pandemic has exposed inadequate health and sanitation systems globally.<sup>203</sup> Most countries, especially poor countries, have insufficient health facilities, medical supplies and health care workers for the surge in demand.<sup>204</sup> The number of people covered by essential health services—the services prioritized by health systems to prevent or treat diseases—in 2017 was estimated to be between 2.5 billion and 3.7 billion—about one-third to one-half of the global population. Access to water and sanitation (SDG 6) remains a major health issue: 2.2

**Figure 3.14 Maternal mortality ratio, 2000–2017 (deaths per 100,000 live births)**



Source: UN DESA 2021.

**Figure 3.15 Under-five and neonatal mortality rates, 2000–2020 (deaths per 100,000 live births)**



billion people remain without safe drinking water.<sup>205</sup> Access to quality health care differs widely between the global North and South. For example, with regard to mental health care, a 2017 study found that in high-income countries the proportion of people with depressive disorders being adequately treated was around one in five, while in low- and middle-income countries it was only one in 27.<sup>206</sup> Poverty also highly curtails access to health care, particularly for those without health insurance such as undocumented migrants, as well as self-employed and informal workers, resulting in significant disparities in health outcomes across socioeconomic groups.

Overlapping inequalities compound to create steep disparities in health across groups, with vulnerable groups facing greater health consequences, often receiving poorer quality care or having little or no access to health care. For example, race and ethnicity have a strong bearing on health outcomes. The Covid-19 pandemic revealed steep disparities, with people of colour dying from the virus at much

higher rates. But beyond Covid-19, these inequalities exist and have existed for a wide range of medical conditions, with persons of colour experiencing higher rates of illness and death than their white counterparts. In the United States, African American women are 40 percent more likely to die of breast cancer than white women,<sup>207</sup> In Australia, the life expectancy of Indigenous people is eight years less than that of non-Indigenous people.<sup>208</sup> In the United Kingdom, Black and minority ethnic groups are more likely to be detained under the Mental Health Act than their white counterparts, spend longer in detention, be subject to punitive forms of care and die in detention.<sup>209</sup> There are a number of factors responsible for this, which are rooted in systemic racism, and intersect with poverty, space and gender (see box 3.5). They include implicit and explicit bias of medical providers which can lead to providing poorer quality care,<sup>210</sup> insufficient funding for medical facilities and lack of providers in low-income and minority neighbourhoods, hesitancy to seek care due to lack of trust in the medical system as a result of historical legacies of exploitation and

harm,<sup>211</sup> lower rates of health insurance among racial and ethnic minorities (often due to precarious employment),<sup>212</sup> and other factors intersecting with socioeconomic status.

Further, globally there are many gendered forces that impede equal access to health, which are often concealed by the fact that women have a higher life expectancy than men worldwide. These include cultural factors that restrict women's bodily autonomy; male bias in the development of vaccines, drugs and diagnostics; disparities in sexual education between boys and girls; and stigmas that marginalize people whose gender identity does not conform to their biological sex at birth as well as people who engage in same-sex sexual relationships. These are compounded by and reflect various overlapping forms of inequality (see box 3.5). Exploring the nexus between health outcomes and socioeconomic structures through a gendered lens is necessary for developing a holistic and intersectional understanding of health inequalities.

Gender bias in medical research, diagnosis and treatment is well documented.<sup>213</sup> Men are more likely than women to receive more advanced diagnostic and therapeutic interventions.<sup>214</sup> Further, there has long been a problem of gender blindness in clinical studies, either with not enough women included, or where no sex-based analysis is conducted on the findings, meaning that "a great deal of contemporary knowledge about diseases and risk factors is constructed without considering the relevance of either sex or gender."<sup>215</sup> Moreover, gender stereotypes and preconceptions often have a significant impact on diagnosis and treatment, especially when it comes to mental health and sexual and reproductive health. Transgender and gender non-conforming (TGNC) individuals in particular face barriers in access to tailored health care, as well as gender-affirming treatments/surgeries, because of stigma, legal barriers, insufficient resourcing and capacity, and lack of research.<sup>216</sup>

However, understanding the impact of gender disparities on health outcomes requires looking beyond the health system itself and taking a life course approach to understand the long-term effects on chronic disease risk of physical and social exposures throughout a person's life,<sup>217</sup> specifically the way that "social influences become literally embodied into physio-anatomic characteristics that influence health and become expressed in societal

disparities in health."<sup>218</sup> In the case of gender, this can include, for example, gender divisions of labour that create time poverty and result in unequal access to education, or cultural factors/norms that determine opportunities and constraints for different groups of women to acquire or adhere to health advice. The same applies to LGBTIQ+ persons who are often discriminated against by health workers, reducing the likelihood they will seek out care in the future and leading them to turn to non-professionals or to treat themselves.<sup>219</sup> On top of this, other forms of inequality exacerbate and compound these, whether they be environmental, from lack of access, or from stress arising from poverty, experiences of discrimination or other forces. Various studies have analysed the internal stressors that lead to poor mental health outcomes, a concept known as minority stress, which refers to chronically high levels of stress experienced by stigmatized groups.<sup>220</sup> In the case of TGNC individuals as well as LGB persons, this can take the form of identity concealment, internalized stigma and expectations of rejection, with well-documented negative mental health outcomes arising as a result, as well as increased likelihood of suicide.<sup>221</sup> Ultimately, the factors leading to gender disparities in health outcomes stem from a combination of direct discrimination in the medical field and long-term and overlapping structural inequalities that are both gendered in nature and intersect with other forms of inequality, for example, race and class (see box 3.5).<sup>222</sup>

Health disparities are also spatial in nature, as where one lives also has an impact on access or lack thereof to health services and on health and safety outcomes. In terms of resources and services, there exist crucial disparities around access to and quality of health care, with facilities in impoverished neighbourhoods and rural areas being of lower quality, underfunded and overcrowded, and in rural areas patients may have to travel long distances to receive care. Further, industrial sites are more often located in the proximity of marginalized neighbourhoods, creating environmental health risks to residents, for example, in Jackson, Mississippi, where crumbling infrastructure combined with poorly regulated industry, made worse by a deteriorating tax base thanks to tax cuts for the rich, has left residents in poor, mostly Black neighbourhoods exposed to harmful pollutants from industry in both the air and water.<sup>223</sup> This is also the case for mining communities who suffer adverse impacts from poor environmental practices of mining companies, such



as contamination of the water supply.<sup>224</sup> Further, there is a strong correlation between urban tree cover and income,<sup>225</sup> as well as other factors such as race,<sup>226</sup> which has impacts on air quality, heat and mental health.

### Box 3.5 The crisis of maternal mortality among Black women in the United States

In the United States, Black women are three to four times more likely to die from complications from pregnancy than white women.<sup>a</sup> This disparity well reflects the intersections of gender and racial discrimination and the importance of viewing overlapping inequalities as more than the sum of their parts. The disproportionately high rate of maternal death among Black women is a result of multiple health and social factors that stem from various compounding forms of institutional and individual-level racism and discrimination which entrench poverty and prevent social mobility. Maternal mortality among Black women can be attributed to particularly high levels of comorbidity among the population, which is compounded by poor quality hospitals and insufficient access to care. These factors can be attributed to historical forms of discrimination that have created socioeconomic disparities that lead to negative health impacts. For example, Black women are more likely to live in residential segregation resulting from racist practices that have led to community divestment, which, combined with other forms of discrimination, such as in employment and education, have resulted in Black women earning USD 5,500 less per year, experiencing higher rates of unemployment and being 10 percent more likely to live in poverty and 20 percent less likely to own a home than women on average. Further, such factors also determine one's ability to access quality care in terms of cost, location, information and time. Black women are more likely to be heads of households and therefore have fewer resources to support more dependents, skewing the distribution of the care burden even further toward Black women. Medical bias also plays a distinct role, with Black women highly underrepresented in biomedical research and health care workers taking the concerns of Black women less seriously. On top of all this, stress associated with "the distinct social experiences of Black womanhood in US" compounds health impacts further.<sup>b</sup> Ultimately the social conditions that create the environment for the health disparities Black women face are highly gendered and racialized, in ways that build on and compound each other, and cannot be understood as separate.<sup>c</sup>

<sup>a</sup> Centers for Disease Control and Prevention 2020; <sup>b</sup> Chinn et al. 2021:215; <sup>c</sup> Chinn et al. 2021.

### 4.2.6 Social protection coverage and the rise of cash transfers

Inequality in social protection coverage has important implications for poverty and capabilities of individuals and households, but it also has wider development implications, as social protection is a key instrument for economic development, redistribution, protection and reproduction.<sup>227</sup> Coverage with social protection benefits for income maintenance across the life course from childhood to old age and in times of sickness, accidents, unemployment or co-variate shocks only applies to less than a third of workers and their families: 69.4 percent of the global working age population has no or only partial access to comprehensive social protection systems (table 3.2).<sup>228</sup>

Many vulnerable groups do not benefit from any form of social protection. In 2020, less than 20 percent of older persons received a pension and only 33.5 percent of persons with severe disabilities received disability cash benefits, 26.4 percent of children worldwide had access to social protection (ranging from 12.6 percent in Africa to 18 percent in Asia, and 70 percent in Latin America) and only 45 percent of women giving birth were covered by maternity benefits.<sup>229</sup>

Differences regarding access to social protection also play out regionally, with the lowest coverage rates found in low-income countries and LDCs, whereas some MICs, in particular in Latin America, have achieved universal coverage regarding some benefits, for example, old age pensions (see chapters 2 and 4 and table 3.2).

According to recent ILO data (table 3.2),<sup>230</sup> countries in Europe and Central Asia display almost universal coverage rates for pensions (96.7 percent), while only a quarter of the population in the Arab region and Africa are entitled to receive a pension. When it comes to unemployment insurance, coverage is even lower, ranging from 51.3 percent in Europe and Central Asia to only 5.3 percent in Africa.

The example of Latin America is illustrative of the correlation between contributory social security coverage and income inequality: for the first income quintile, no country in the region reaches 40 percent coverage and the vast majority stays below 20 percent coverage due to the association of low incomes with

**Table 3.2 Effective social protection coverage by population group, global and regional estimates, 2020 or latest available year**

	Europe and Central Asia	Asia and the Pacific	Arab States	Americas	Africa	World
<b>Vulnerable persons covered by social assistance</b>	64.4	25.3	32.2	36.7	9.3	28.9
<b>Older persons</b>	96.7	73.5	24.0	88.1	27.1	77.5
<b>Unemployed</b>	51.3	14.0	8.7	16.4	5.3	18.6
<b>Workers in case of work injury</b>	75.5	24.8	63.5	57.4	18.4	35.4
<b>Persons with severe disabilities</b>	86.0	21.6	7.2	71.8	9.3	33.5
<b>Mothers with newborns</b>	83.6	45.9	12.2	51.9	14.9	44.9
<b>Children</b>	82.3	18.0	15.4	57.4	12.6	26.4
<b>Population covered by at least one social protection benefit</b>	83.9	44.1	40.0	64.3	17.4	46.9

Source: ILO 2021a. Copyright International Labour Organization 2021. Reproduced with permission.

Notes: Global and regional aggregates are weighted by relevant population groups. Estimates are not strictly comparable to 2016 regional estimates owing to methodological enhancements, extended data availability and country revisions. To be interpreted with caution: estimates based on reported data coverage below 40% of the population.

informality. On the contrary, the highest income quintile displays coverage rates above 40 percent in the entire region, reaching 80 percent coverage or higher in eight countries. Higher coverage rates of social security benefits are also found in companies with 20 or more workers in all countries, with a majority of companies exceeding 80 percent coverage. In comparison, companies with five workers or less have coverage rates below 20 percent.<sup>231</sup>

One particular social protection instrument, cash transfers targeted at poor and vulnerable groups and usually funded out of general budget revenues and aid, has seen a spectacular increase in a growing number of countries during neoliberal globalization.<sup>232</sup> Such programmes can be used to extend social protection to sectors of the population traditionally excluded from statutory contributory social insurance because of either their informal employment status or low incomes. As part of targeting within a broader universal system consisting of contributory and tax-financed benefits, they can be a powerful means to realize the right to social protection and to prevent poverty.<sup>233</sup> However, the benefits and shortcomings of poverty targeting through means-testing or proxy-

means-testing remain controversial, and many of their negative impacts increase inequality and fragmentation.<sup>234</sup> Concerns about targeted CCTs have been raised in particular with regard to high administrative costs, stigmatization risk, inclusion and exclusion errors and creation of dualist systems.<sup>235</sup> A particular risk associated with targeting benefits based on means testing is the delinking of access to social protection from rights of citizenship/residency, which can enhance the discretionary power of authorities, especially at the local level. Assigning benefits may thus create incentives for undesirable behaviour such as corruption or bias,<sup>236</sup> while also increasing the risk of ad-hoc cuts in times of budget constraints. Further barriers to take-up of social protection rights including cash transfers are lack of awareness of available benefits, complex, often humiliating processes that discourage individuals from applying, gaps in social registries and difficulties for undocumented migrants or informal workers to meet application conditions such as identity documents or formal work registration. As the Special Rapporteur on extreme poverty and human rights, Olivier De Schutter, remarks: “Where non-take-up results from

the attitude of social services or from administrative negligence, it may cause frustration, a loss of trust between rights holders and public institutions and the breakdown of the social contract between rights holders and their governments.”<sup>237</sup>

Despite these shortcomings, CCTs and other targeted social assistance programmes have been the social protection instrument of choice of many governments and donors since they were first introduced in Latin America in the 1990s, and have only recently been endorsed in a World Bank publication.<sup>238</sup> Initiated as small-scale pilots led by international organizations, and often targeted at particular groups (such as AIDS-affected populations), an increasing number of countries have adopted national programmes.<sup>239</sup> Globally, 28.9 percent of vulnerable persons received a social assistance cash transfer in 2020,<sup>240</sup> with coverage ranging from 9.3 percent in Africa, to 25.3 percent in Asia and Pacific, 36 percent in Latin America and 75.1 percent in Europe. Some middle-income countries have achieved universal coverage of cash transfer programmes and increased access to social services within comprehensive systems as part of a transformative approach (see chapters 2 and 4).<sup>241</sup> Argentina, Brazil and Chile have reached near universal coverage of children and elderly persons with cash transfers.<sup>242</sup>

In sub-Saharan Africa, cash transfer programmes are largely unconditional—in part due to supply-side constraints on health and education services and limited administrative capacity to ensure conditions can be implemented. For example, Kenya’s cash transfer programme for orphans and children (CT-OVC), which covered around 350,000 households by the end of 2017,<sup>243</sup> shows the challenges regarding programme implementation. Informal institutions such as chiefs, assistant chiefs and community elders play an important role in the delivery of the programme, in particular regarding targeting, enrolment, delivery, monitoring, awareness and information, data collection, and grievance and redress mechanisms. While the involvement of traditional authorities, which is not stipulated in formal programme regulations, fills in administrative gaps and reduces transaction costs, they also act as gatekeepers, at times abusing their position for personal benefits and undermining programme objectives.<sup>244</sup>

Erroneous assumptions about the causes of poverty and the behavioural choices of individuals and families frequently influence behaviours of street-level bureaucrats implementing programmes. Bolsa Familia, the renowned conditional cash transfer programme in Brazil, transfers cash exclusively to mothers based on the assumption that they are more likely than fathers to use the money to meet their children’s needs (for example, for food, hygiene and school supplies). While for many poor women the cash transfer is their first and only independent source of revenue, it also reinforces expectations that mothers act as main caregivers, reproducing traditional gender stereotypes and the associated burden of care. This has impacts on the life chances of women by reducing their opportunities in the formal job market, owing both to time restrictions and to their own and others’ perceptions about their roles, while it opens the door to practices of stigmatization and moral regulation, a practice that has also been observed in the Mexican CCT Progresa/Oportunidades.<sup>245</sup> Eliminating conditionalities could be one way to decrease the discretionary power of bureaucrats and strengthen the rights-based nature of the transfers, with positive impacts on equality and equity. Establishing a link with quality social services is, however, important, and can be achieved through public provision of free health and education which improves capabilities and well-being and reduces out-of-pocket payments for households. Take-up of social rights can further be promoted through outreach and information strategies, automation of benefits and participation of beneficiaries in design, implementation and monitoring of social protection schemes.<sup>246</sup> Finally, categorical cash transfers, for example universal child benefits and social pensions, contribute to income security and cover parts of life course related investments of families.

#### 4.2.7 Labour markets

Employment is the most important income source for the majority of people in the world, either through their own participation in labour markets or as members of households sustained by employment earnings, hence the important role employment plays for poverty reduction, well-being and social equality. Labour markets and employment outcomes are situated at the interface of the economic and the social; they are strongly influenced by macroeconomic conditions

as well as public policies, which requires a broad set of interventions to address insufficient labour demand, to increase labour mobility and to improve the equality of employment. In addition, there are increasing demands for greening jobs in a context of the global climate crisis and growing environmental concerns, while awareness is rising of the fact that workers should not bear a disproportionate burden from the ecological transition and that transitions need to be just (see chapter 5).

The creation of decent jobs is not an automatic outcome of growth. It requires both implementation of labour standards and inclusive employment policies promoted by strong labour unions and social dialogue mechanisms. It further needs a pattern of growth and structural change that generates productive employment, improves earnings and contributes to the welfare of the population.<sup>247</sup> Full employment and freely chosen productive employment for sustainable livelihoods was also a key demand of the Copenhagen Social Summit (UN 1995), though this has largely been ignored in development approaches since the 1990s (chapter 2). During the period of neoliberal hyperglobalization, labour market inequalities increased, for example, because of higher skill requirements associated with new technologies and the dismantling of labour market institutions (see chapter 1). These inequalities are characterized by persistent and rising informalization, precarious forms of employment and rising income and wage disparities. This does not come as a surprise, given that employment-centred development paths are incompatible with neoliberal development strategies, as they require substantive public investments in infrastructure, industrial and agricultural policies, and comprehensive social policies.<sup>248</sup>

Patterns of structural change in a globalized world, however, do not follow the traditional patterns experienced by today's high-income industrialized countries, except in some countries in East Asia: most workers leaving agriculture are not absorbed by manufacturing but go into low-productivity activities in the informal economy with jobs that are poorly remunerated and lack social protection, which explains the low coverage rates of social insurance in sub-Saharan Africa, the Middle East and North Africa, and parts of Asia.<sup>249</sup>

Recent labour market data provide an alarming picture of significant inequality and precarity in the world of work:

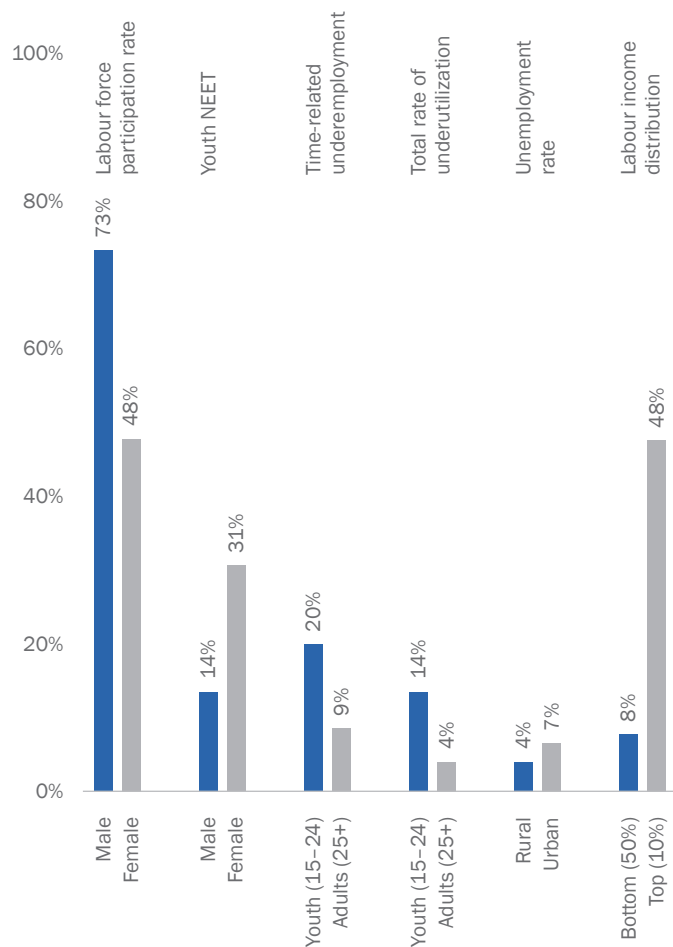
In low- and middle-income countries, 1.4 billion own-account and contributing family workers, who are typically employed informally, work in vulnerable conditions and earn a much lower income than people earning a formal wage or salary. Around two billion workers worldwide are informally employed, accounting for 61 percent of the global workforce.<sup>250</sup> In 2019, more than 630 million workers worldwide did not earn enough to step out of extreme or moderate poverty (defined as them earning less than USD 3.20 per day in purchasing power parity terms). While the rate of working poverty has been declining at the global level, very limited progress has been achieved in low-income countries.<sup>251</sup>

Contemporary labour markets also continue to be characterized by gender inequality (figure 3.16). In 2019, the female labour force participation rate was just 47 percent, 27 percentage points below the male rate (at 74 percent). Apart from access to employment, there are also persistent gender disparities in relation to job quality. This is true even in regions where women have made significant inroads in the labour market. In Latin America and the Caribbean, for example, the average level of educational attainment of women now surpasses that of men, yet women in the region still earn 17 percent less per hour worked than men.<sup>252</sup>

Gendered barriers to participation in the labour market also affect those who fall outside socially imposed roles and expectations, such as LGBTIQ+ people, especially those who belong to disadvantaged classes or race or ethnic groups.<sup>253</sup> This can also take the form of outright employment discrimination, with an EU survey revealing that one in four LGBT persons hide their identity at work.<sup>254</sup> Survey data show higher rates of unemployment among these populations, as well as greater experience of discrimination.<sup>255</sup> A study comparing the percentage of trans people in paid employment with the percentage of those in paid employment in the general population in Australia, Ireland, the United Kingdom and the United States found “outrageously high” transgender unemployment rates.<sup>256</sup> The vast majority of UN member states do not have protections against discrimination in the workplace, which ranges from discrimination in hiring practices and pay to harassment at work.

Racial and ethnic discrimination in the labour market is also widely prominent. In Brazil, while persons of colour make up just over half the workforce, they account for 64.2 percent of unemployment and 66.1

**Figure 3.16 Global inequalities in labour market outcomes, 2019**



Source: ILO 2020c, 2021c.

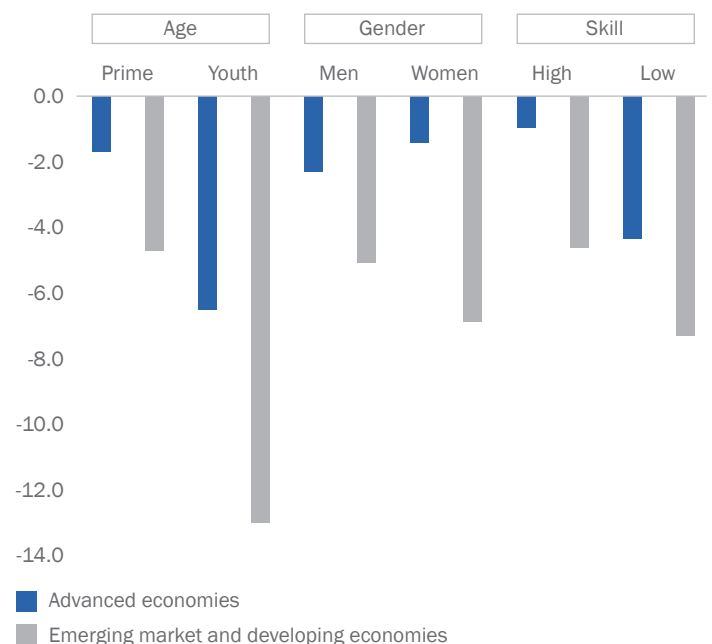
Notes: Youth NEET refers to youth not in education, employment or training. Total rate of underutilization and time-related underutilization uses ILO 2020c. All other indicators use ILO 2021c.

of underemployment in the country. The relative disadvantage of people of colour in the labour market stands even when compared by education level. Further, in 2018, the average monthly income of white Brazilians was 73.9 percent higher than that earned by Black and mixed-race Brazilians.<sup>257</sup> In the United States, the median Black worker earned 24.4 percent less than the median white worker in 2019. And when controlling for racial differences in education, experience and geographical wage disparities, that gap only shrunk by 10 percent, leaving an “unexplained gap” of 14.9 percent.<sup>258</sup> Finally, in Peru and Chile, despite increased access to higher education, graduates from disadvantaged groups earn less than their counterparts with the same degrees.<sup>259</sup>

Young people and rural populations are also doing less well in the labour market (figure 3.16), a pattern that worsened during the Covid-19 pandemic (figure 3.17). When the pandemic hit, impacts on employment were more than twice as severe for young adults.<sup>260</sup> Since the financial crisis in 2008, we have observed an evolving youth employment crisis as part of the increasing fragility of global labour markets, characterized by wage deflation, informality, uncertainty in access to decent jobs and short-term contracts, including for young overqualified workers.<sup>261</sup> While several policies targeted at youth have been implemented post-2008 and in the context of the Covid-19 response, increasing the supply of quality jobs through investments in strategic (green) sectors and infrastructure, as well as improving the education–work nexus, will be crucial to overcome structural barriers for youth to thrive in the workplace.<sup>262</sup>

The labour income share—as opposed to the share of national income going to the holders of capital—declined at the global level from 54 percent in 2004 to 51 percent in 2017. The decline has been most pronounced in Europe and Central Asia and in the Americas. In high-income countries, the decreasing labour income of the self-employed, compared with that of employees, is a key driver of the aggregate

**Figure 3.17 Declines in employment rate during Covid-19 pandemic, 2019–2020**



Source: IMF 2021. Notes: Figure represents average percent difference from 2019:Q1 to 2021:Q1.



**[During the pandemic,] the trade-off between lives and livelihoods played out very differently for different groups of workers depending on where they were located in the pyramidal structures of labour markets ... across the world. The impact was harshest for workers at the bottom of the pyramid, those whose class disadvantage was exacerbated by their marginalized social identities, with gender being the most pervasive of these identities.**

– Naila Kabeer

*Professor, London School of Economics*

decline, a finding that is consistent with a scenario in which new forms of work are eroding the earning power of the self-employed.<sup>263</sup> In several high-income countries, such as the United States and Germany, real wages have not kept up with productivity gains: in the United States, from 1973 to 2013, hourly compensation of a typical worker rose just 9 percent while productivity increased 74 percent, whereas between 1948 and 1973 productivity increases were fully translated into wage increases.<sup>264</sup> In Germany, real wages at the 15th percentile fell dramatically from the mid-1990s onwards, followed by declines in median real wages from the early 2000s onwards, with only wages at the top of the distribution increasing.<sup>265</sup>

Looking into inequalities in the distribution of global labour income displays increasing disparities. In 2017, a worker belonging to the upper decile of the global labour income distribution earned on average USD 7,400 per month, whereas a worker in the bottom decile earned just USD 22 per month.<sup>266</sup>

The lowest 20 percent of income earners (around 650 million workers) earns less than 1 percent of global labour income.<sup>267</sup> While labour income inequality at the global level has declined over the past 15 years—as a result of economic convergence driven by countries such as India and China, which have enjoyed a rise in average labour income—inequality within countries has stagnated over the same period.<sup>268</sup>

While the Covid-19 crisis has exposed and exacerbated many social and economic inequalities, it has also led to some reflection on societal values,<sup>269</sup> including the revalorization of essential workers (including care workers), and the importance of universal health services and social protection (see box 3.4 and Spotlight by Naila Kabeer).<sup>270</sup> Many needed transformations to overcome social inequalities and advance human well-being are possible through a more equitable distribution of resources, effective anti-discrimination legislation, inclusive labour market reforms, and a shift toward the universal provision of public goods and services, policies we discuss in more detail in chapter 5.

## 5. Political Inequalities

Political inequalities are an underlying cause of political outcomes that reproduce socioeconomic inequalities and are unfavourable to egalitarian policy change. They are both a product of inequalities in the economic and social realms and also act to perpetuate and even expand such inequalities. Indeed, evidence exists that policy making is systematically biased toward interests of affluent citizens and groups, as shown for a variety of countries.<sup>271</sup> As elites maintain a prominent foothold in political processes, whether directly or indirectly, they often serve to preserve and perpetuate a system that benefits the few at the expense of the many, halting the possibilities for equitable redistribution. Elites use their structural (disinvestment) and instrumental (lobbying) power to influence politics, policies and resource distribution, whereas marginalized groups struggle to access finance and information and to organize and voice their interests in the political system. Even outside of intentional efforts to influence political outcomes, the perspectives and interests of elites, as a result of their networks and access, are more visible and therefore more often taken up.





**Evidence exists that policy making is systematically biased toward interests of affluent citizens and groups. As elites maintain a prominent foothold in political processes, whether directly or indirectly, they often serve to preserve and perpetuate a system that benefits the few at the expense of the many.**

While certain achievements have been made over past decades regarding participation and consolidation of electoral democracies, as well as commitments to human rights and the rule of law, recent trends are worrying for several reasons. First, state legitimacy and credibility are increasingly questioned and trust of citizens in political leaders is eroding (see chapter 2),<sup>272</sup> while corruption continues unchecked. Second, the unraveling of previous social contracts as a result of neoliberal policies has increased the power of actors benefiting from unfettered capitalism and weakened systems which aimed to re-embed markets into social (and ecological) norms. Finally, crisis periods—including the recent Covid-19 pandemic—are sometimes used by governments to curtail citizenship and social rights by ruling by decree and circumventing democratic procedures, scapegoating and stigmatizing vulnerable groups such as migrants, introducing austerity measures while bailing out big businesses or banks, or instrumentalizing the crisis for their own benefits in various ways.<sup>273</sup>

This section will explore the drivers of political inequality, how they reinforce other forms of inequality and who benefits and to what end. Several topics are therefore worth exploring, looking at both the top and bottom of the pyramid: the political

influence of elites on policies and legislation through various strategies, including business networks and lobbying, media control and outright state capture, as well as strategies to consolidate wealth and power; elite perceptions regarding inequalities and their willingness to address them; and the implications of elite influence on politics for both vulnerable groups and the environment, as short-term economic objectives often stand in direct opposition to social and environmental goals.

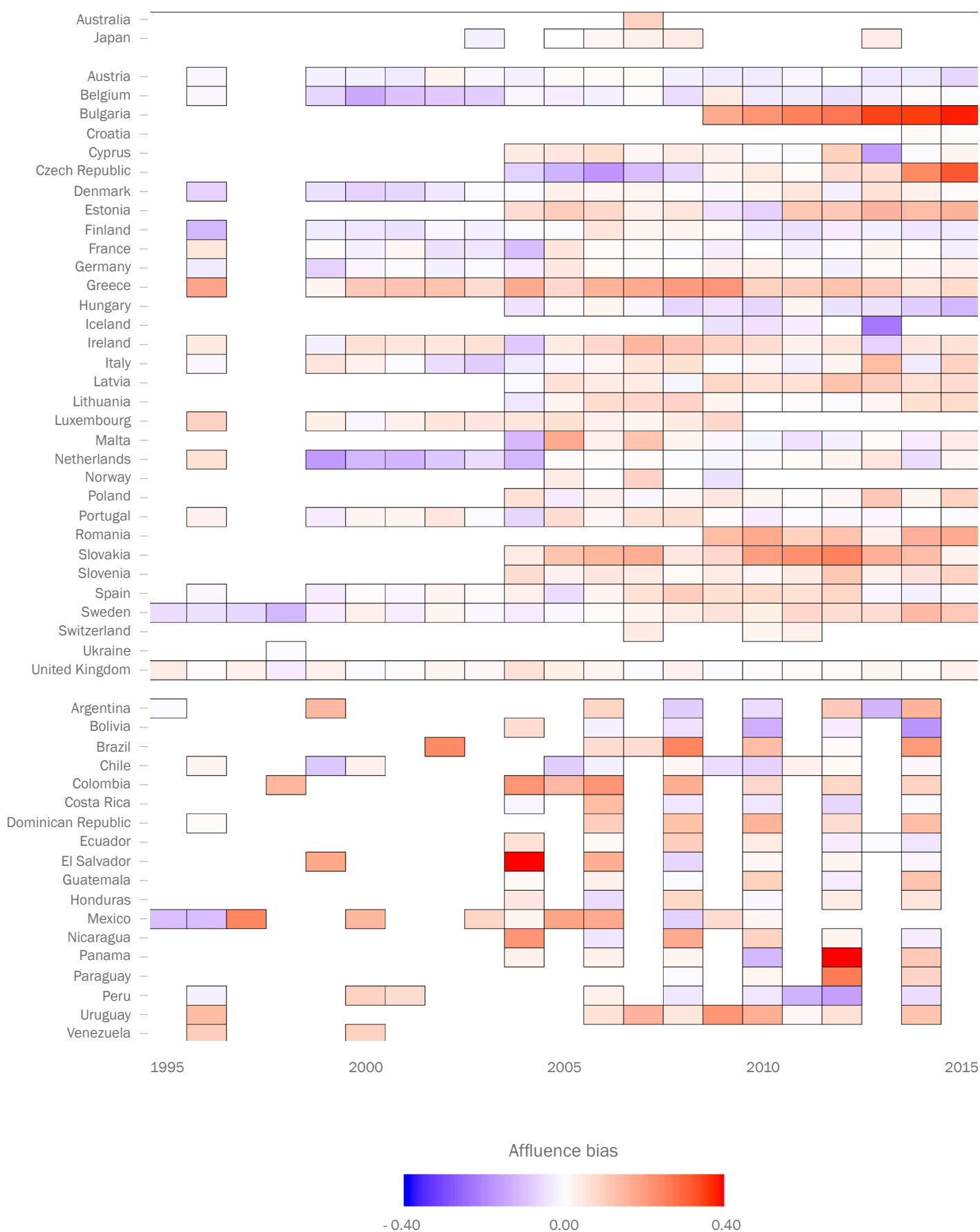
### **5.1 Understanding political inequality: Elites and instruments of power**

In his seminal book on political equality, Robert Dahl (2006:4) prefaced his analysis with one simple statement: “Among adults no persons are so definitely better qualified than others to govern that they should be entrusted with complete and final authority over the government of the state.” Yet globally there exist steep disparities in access to decision making, with both vertical and horizontal inequalities reproduced in power relations.<sup>274</sup> In this way, power disparities both reflect and reproduce inequality, as unequal influence over decision making leads to unequal outcomes of those decisions.<sup>275</sup>

Political equality requires more than representation of all groups in elected office; it necessitates participation by the citizenry in the political system and the institutions that enable it. Political inequality can manifest at various levels and sites.<sup>276</sup> In fact, there are many factors that affect one’s access to political power, for example, lack of access to information, time, finance and organization.<sup>277</sup>

To better understand how political inequalities come about and why reversing them is so difficult, it is necessary to look at elites. Elites constitute a unique social group defined by their disproportionate control over resources—be they economic, political, social, cultural—and their ability to translate those resources into power, influence and other forms of capital.<sup>278</sup>

There are significant data to suggest that political systems bend toward the preferences of elites. They are found to be overwhelmingly more satisfied with the system than average citizens, participate more and have more representation in politics.<sup>279</sup> While there is much research on this topic in Western countries,<sup>280</sup> recent studies show it is a problem the

**Figure 3.18 Affluence bias around the world**

Source: Lupu and Warner 2022. Used with permission of authors.

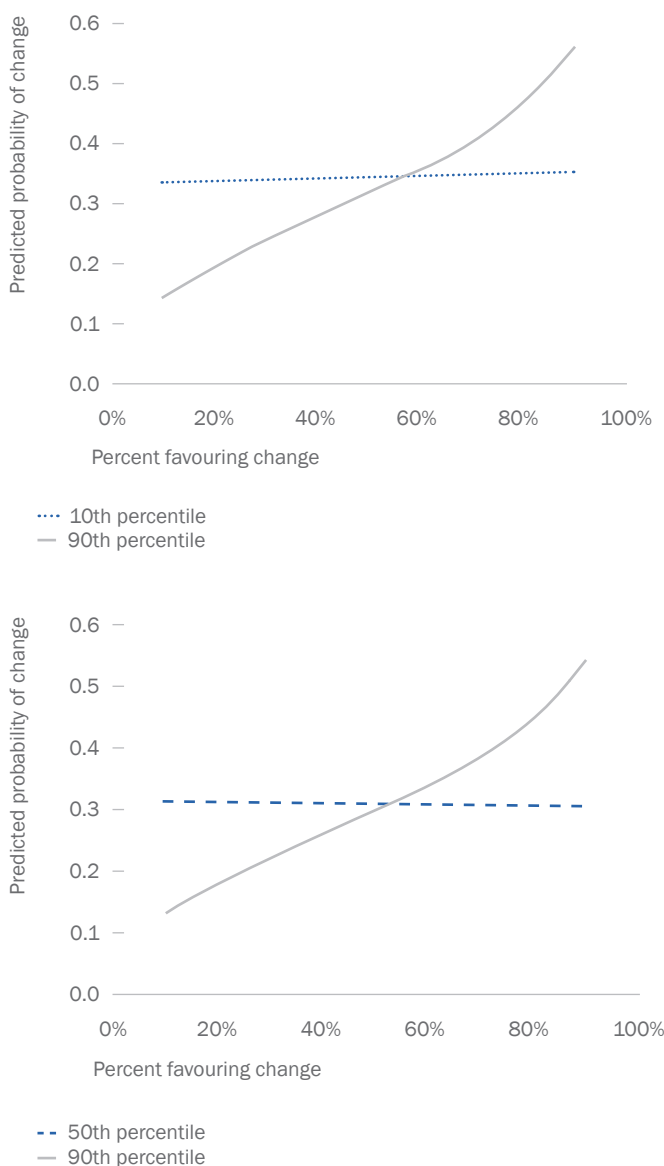
Notes: Each cell is shaded according to the size of the affluence effect. Darker red indicates greater bias in favour of the affluent, while darker violet indicates bias in favour of the less affluent.

world over (see figure 3.18).<sup>281</sup> There is often a direct relationship between elite preferences and policy outcomes, whereas the preferences of the lower and middle classes have little impact on policy outcomes (see figure 3.19). However, it is important to note that vertical inequalities in politics remain very difficult to measure, largely because elites are an elusive group on which to collect data.<sup>282</sup>

This significant overrepresentation of elite preferences in policymaking is a result of their political influence.<sup>283</sup> But how exactly do elites translate their

economic resources into political power? There are two mechanisms through which this occurs: the first is through structural power, which involves economic elites' ability to influence policy through their bargaining power, built on their power to disinvest and transfer their capital abroad and their speculative activities;<sup>284</sup> and the second is through instrumental power, which relies on relationships with policy makers, media access, expertise and other forms of influence, using tactics such as lobbying, political financing, media capture, revolving doors and other forms of direct engagement in the political arena (see Spotlight by Anya Schiffrin).<sup>285</sup>

**Figure 3.19 Impact of preferences of 90th percentile on policy compared with 10th and 50th percentiles**



Source: Gilens 2012. Copyright Princeton University Press 2012. Reproduced with permission.

There are two key ways in which businesses wield instrumental power: business-politics connections and business cohesion.<sup>286</sup> The first occurs through movements of businesspersons into politics—which can lead to conflicts of interest, cronyism and corruption—lobbying and contributions to political campaigns.<sup>287</sup> Contributions to campaigns can lead to dependency of political parties on elites and indebt politicians to their funders, influencing their policy choices.<sup>288</sup> Even philanthropy has a role to play, as elite investment in charitable causes grant them a considerable say in how specific social problems are addressed, helping “elites retain their advantaged positions by legitimizing the system producing the inequalities they benefit from in the first place.”<sup>289</sup> The Covid-19 global vaccination effort is a prime example, in which a handful of privately funded organizations were granted unprecedented influence and decision-making power over the global vaccination effort, influence used to oppose lifting intellectual property protections and democratizing vaccine access (see Spotlights by Jayati Ghosh and Winnie Byanyima).<sup>290</sup>

The other key source of influential power is business cohesion. In stable democracies, elites tend to agree on the rules of the game.<sup>291</sup> Culture and common understandings of the world are also considered key resources of elites,<sup>292</sup> who are often linked much more closely to each other across linguistic, cultural and geographic divides than to citizens of their own nations and possess a certain “class consciousness.”<sup>293</sup> This cohesion, according to Winters (2011), is facilitated by an inherent alignment of interests that naturally arises from the shared desire to protect their wealth.<sup>294</sup> The most consequential result of these processes is state capture, when state functions are adjusted to serve particularistic interests.<sup>295</sup>

**What has changed the media landscape over the last 20 years is the globalized nature of media ownership and the rise of technology giants acting as gatekeepers of information. These fundamental shifts have paved the way for new forms of media capture, affecting both coverage and access to information.**

– Anya Schiffrin  
Senior Lecturer,  
Columbia University

The forms of power described above are deeply intertwined with and reliant on inequality. High levels of elite political influence make it easier to repress civil society.<sup>296</sup> Therefore, “politically powerful business groups create obstacles to the emergence and development of redistributive political projects that can threaten their privileged position.”<sup>297</sup>

## **5.2 The role of business: Cases from the global South**

The following case studies provide a window into the specific ways businesses wield political power and what social, economic and environmental consequences this entails. In 2015, 69 of the world’s top revenue generators were companies, while only 31 were states.<sup>298</sup> The largest companies have considerable sway over the global economy, as their investment is increasingly essential for economic and political stability worldwide.<sup>299</sup>

An important place to start when telling this story is with global value chains (see section 3.3), in which leading corporations use their power to push forward and maintain permissive regulatory and political environments, especially around labour and environmental standards. Multinational corporations “mobilize vast political power to create those conditions and ensure that they are maintained.”<sup>300</sup> In an effort to attract foreign investment, producing countries limit labour and environmental standards to make themselves a competitive option. GVCs have reshaped global and regional patterns of specialization and politics of redistribution, creating new political, social and economic power asymmetries.<sup>301</sup> A multi-study project on the copper value chain linking Switzerland, Zambia and China explores the impacts of these asymmetries on Zambia. It has notably shifted the policy landscape, with main actors having significant influence on national regulatory frameworks:<sup>302</sup> “Mining is embedded into a wider landscape of services—transport, trade, financing, insurance etc.—in which decisions are taken that crucially affect the capacity of countries like Zambia to formulate and enforce policies.”<sup>303</sup> The research project reveals the repercussions this has had on Zambian communities along the copper value chain, including unemployment, pollution, lack of labour protections, displacement, loss of livelihoods, unequal distribution of benefits, civil unrest, social stratification and conflict (see box 3.3).<sup>304</sup>

A comparative study on Argentina and Chile explores the way in which taxation, social and labour market policies have been shaped by state-business relations and capital-labour relations.<sup>305</sup> The study finds that the implementation and maintenance of such policies by the state over time is a contested process that has to constantly mediate between business pressures for pro-business policies and the larger society’s demands for social justice. In the case of Chile, a higher degree of business cohesiveness allowed business-encompassing associations to effectively influence the policy-making process, thereby limiting the creation and extension of egalitarian fiscal and labour market policies. At the same time, the greater level of inter-business rivalries in Argentina has enabled the state to push through important social policies and more progressive taxation policies.

However, while business cohesion can be one explanation for disproportionate levels of elite political influence, one study found a somewhat different scenario taking place in Panama, a country with high levels of state capture despite strong governance institutions. The study reveals that a small but powerful fraction of the business elite, rather than the whole business sector, has been able to exert considerable direct control over the state administration, achieved largely through the coordinated funding of a businessman's presidential campaign, and their success in influencing the appointment of closely related business people to strategic government posts.<sup>306</sup>

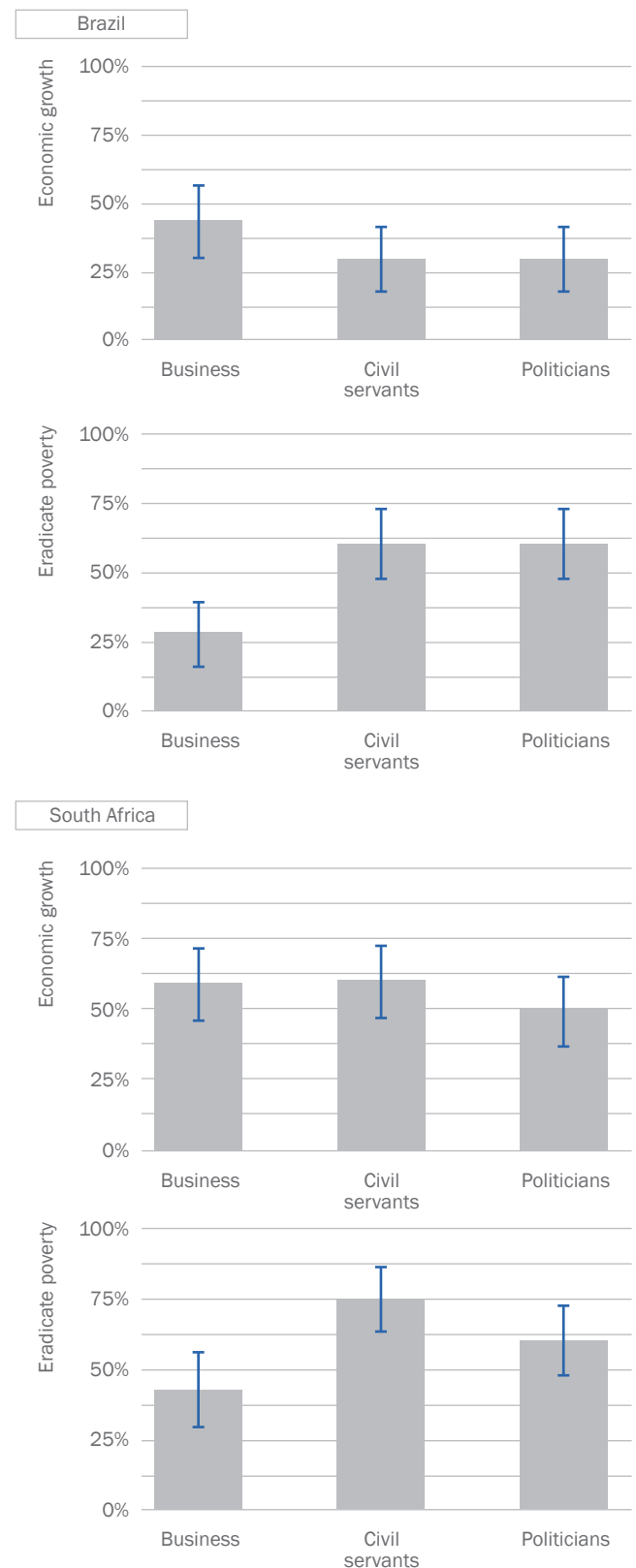
Businesses also wield significant power in times of crisis, as the state acts to protect them from shock. For example, during the 2008 financial crisis, responses centred around bailing out banks and creditors rather than minimizing the impact on vulnerable groups (see chapter 2). During the Covid-19 pandemic, corporations have played an outsized role in shaping policy responses.<sup>307</sup> For example, a number of companies globally lobbied to maintain operations despite significant health risks to their employees<sup>308</sup> and for immunity from Covid-19-related lawsuits.<sup>309</sup> They successfully lobbied for financial benefits such as tax cuts and stimulus money<sup>310</sup> and for weakening environmental regulation, in particular by delaying the passage of important legislation.<sup>311</sup>

### 5.3 Understanding elite preferences

If, by definition, elites concentrate power and resources, it follows that the design and implementation of redistributive policies is shaped by their preferences. Understanding such preferences, as well as the perceptions that influence them, is thus key for understanding how inequality is reproduced or can be transformed. Research from across the globe indicates that elites experience and engage with inequality in very different ways. In Brazil and South Africa, elites believe inequality to be a problem because of externalities such as violence, political patronage and loss of human capital, but ideas on how to address it vary across sectors of elites, in particular between business elites on the one hand (who largely favour economic growth over redistribution) and political and bureaucratic elites on the other (some of whom leaned toward redistribution).<sup>312</sup> When asked about their goals for

the country, business elites pointed to economic growth, whereas civil servants and politicians emphasized the eradication of poverty (see figure 3.20).

**Figure 3.20 Most important national goals according to Brazilian and South African elites**



Source: Moraes Silva et al. 2022.

Opinions on how to address inequality often are determined by how elites perceive the actors involved. A study on elite perceptions in East and Southern Africa reveals that most members of the political elite distinguish between “deserving” and “undeserving” poor people, are averse to “dependency” on “handouts” and worry about the effects of government interventions (including social cash transfers) on productivity and morality.<sup>313</sup> The study also analyses popular attitudes on poverty, inequality and social protection, finding general support for existing social protection programmes, but also a clear perceived hierarchy of those deserving support. Given a certain alignment of norms and values of elites across most of Africa with popular norms and values, social protection policies aligning with both social norms and elite ideology are more likely to be successful.

On the other side of this, in Chile, elites’ distrust of state action leads to unwillingness to pay taxes which elites see primarily as a cost rather than an instrument to promote solidarity or social cooperation.<sup>314</sup> Taxes are also perceived as too high, though the effective tax rates of high-income taxpayers are on par with those of lower classes. The former believe they pay more than what they receive in return.

It is equally important to understand how elites perceive themselves and their role in inequal societies. A study on Mexican elites reveals that the “wealth bubbles” within which elites exist lead to an experience of relative affluence: although elites acknowledge being privileged compared with a majority of the population, they simultaneously feel poorer compared with their exceptionally wealthy peers in their social space.<sup>315</sup> Consequently, despite showing concern about inequality and its negative effects, elites underestimate their own position in the overall income distribution, recentring the distribution around their own incomes. The dissonance between elite perceptions and measured economic status has implications for the social construction and perpetuation of inequality, the study finds.

Given the widespread influence of elites on political decision making, understanding their preferences, and the perceptions that inform them, and how these might align or not with the majority population, is key. However, as the cases above illustrate, elites

are in no way homogeneous, competing among themselves and their preferences shaped by a number of cultural, political and technical factors. As several country examples have shown, this can open opportunities to rein in elite power and implement market regulations and progressive social and taxation policies or to integrate particular elite groups into political alliances for transformative change.<sup>316</sup> While understanding elites as embedded in their particular sociality helps explain how the accumulation of advantages assures persistently high inequality, it can also outline pathways to integrate them back into the social contract.

## 5.4 Intersecting inequalities and political power

Unequal influence over politics is particularly pronounced for vulnerable groups. Globally, elite power is overwhelmingly concentrated in the global North and held by (white) men, with often negative implications for the needs of women, gender-diverse people, minority racial and ethnic groups and developing countries. The nature of elite groups means that gaining access for outsiders is extremely difficult, and they therefore remain highly homogenous. Such circles have their own social rules, norms and processes that serve to keep out all but a very small select group. A study of the hedge fund industry provides an interesting snapshot of the way this is institutionalized into elite spaces.<sup>317</sup> The study finds that the hedge fund industry operates through a patrimonial system relying on elite social ties and industry networks. In this gendered, racialized and class-based system, white men, using their access to resources, support and opportunities, act as gatekeepers of the industry. With limited or no access to such networks, women and people of colour lose out and fail to gain a meaningful say in the actions of an industry that plays a key role in the concentration of wealth, maintenance of status from generation to generation and the widening of inequalities.

On the other side of the coin, opportunities to engage in counterpower and push back against elite domination are often restricted for women, minorities and discriminated groups due to social norms that place them at the bottom of power hierarchies, as well as institutional barriers and limited access.



In the case of gender, historically, the expansion of political rights for women has been bifurcated, with basic capabilities such as voting rights achieved, but little improvement in advanced capabilities such as active participation in political decision making.<sup>318</sup> Specifically, just 26 percent of parliamentarians globally are women,<sup>319</sup> and they occupy an estimated 34 percent of managerial positions in the countries where data are available.<sup>320</sup> These factors are due to structural barriers that limit women's options to run for office in some countries, but also social and cultural ones as well. The UN General Assembly (2011) concurs and states that "women in every part of the world continue to be largely marginalized from the political sphere, often as a result of discriminatory laws, practices, attitudes and gender stereotypes, low levels of education, lack of access to health care, the disproportionate effect of poverty on women" and women's lack of confidence to enter politics, especially at the local level.

The prevalence of money in politics disadvantages women, who have persistently lower incomes than men (for all the reasons explored above) and are often excluded from elite social and business networks that play a key role in raising funds for campaigning.<sup>321</sup> Access to financial resources is even more limited for women facing other overlapping forms of inequality. Time poverty also has a significant role to play, with women engaging disproportionately in care responsibilities, leaving less time to engage in politics, whether running for office or participating in other ways. Capacity gaps mean women, in particular from minority or low-income groups, are less likely than men to have the education, contacts and resources needed to become effective leaders.<sup>322</sup> For women in conflict zones, political participation can carry with it fear of intimidation and violence. In Guinea, for example, the Afrobarometer survey showed 64 percent of women are very concerned about political intimidation.<sup>323</sup>

Further, gender hierarchies which place decision-making control in the hands of men, and traditional beliefs and cultural practices which silence women, present huge barriers to women's participation. These same norms and beliefs also influence voter choices, as women are not seen as being well suited to leadership roles. Gendered hierarchies that prevent women from reaching positions of power in politics also extend to LGBTIQ+ persons. Findings from an UNRISD project on LGBTIQ+ inclusion

indicate that most LGBTIQ+ respondents felt that in practice they cannot engage in political processes without the risk of discrimination, and that if they did, their position would not be taken into account as much as that of a cisgender heterosexual citizen.<sup>324</sup>

One way in which power imbalances are exacerbated for marginalized groups is through spatial inequality.<sup>325</sup> The degradation of public space erodes practices of citizenship and solidarity with impacts on participation; situations of precarity (such as living in neighborhoods with scarce resources or high levels of violence) often prompt people to turn to support from private actors, leading to clientelism that undermines democracy; electoral reforms such as redistricting disenfranchise voters by minimizing the impact of their vote and in effect isolating them from political processes.

One of the most direct forms of political inequality involves the influence of elites in urban politics. One aspect of this relates to the growing interest of cities to attract elites as residents and investors, leading to a series of "accommodating strategies" on the part of cities to create an ideal environment for further wealth accumulation. In their analysis of London, Atkinson, Parker and Burrows (2017:118) write that it has become "a space increasingly made by, and in response to, the raw power of supremely monied individuals; individuals whose profound wealth is both courted and supported by a large cadre of cultural, financial and political intermediaries."<sup>326</sup>

These processes are deeply bound up with global capital, as the presence of such elites strengthens a city's proximity and centrality to global financial markets. Yet they also touch down locally, rebuilding cities to serve the owners of capital through policy, urban planning, architecture and transformation of service sectors, to the detriment of all but the rich.<sup>327</sup> These structural forms of elite urban power are complemented by instrumental power. While such forms of elite urban capture are less studied, there are a number of cases that document it, for example, in participatory budgeting processes, including in Mexico City<sup>328</sup> and India.<sup>329</sup> A city-to-city partnership initiative between Brazilian and Mozambican cities reveals how locally rooted interventions meant to stem inequalities are often either directly co-opted by elite actors or are by design vulnerable to their interests.<sup>330</sup> Taken together, these processes serve to close out possibilities for citizens to influence the

**Behind certain climate philanthropists' claims that they are simply following the science and adopting a common-sense, data-driven and bipartisan approach to addressing the climate problem lies a deeply political and ideological endeavour to shape the low-carbon transition in their image, and in a way that legitimizes extreme wealth and the super-rich.**

– *Edouard Morena*  
Lecturer, University of London  
Institute in Paris

political system at the level closest to them, with profound consequences for inequality in all its forms.

### **5.5 Environmental consequences of elite capture**

The influence of wealth in politics also has significant environmental impacts, as short-term economic interests often stand in direct opposition to reducing emissions and preserving natural resources. Wealthy individuals and companies are able to wield their resources and power to influence policy, for example, by blocking progressive policies such as taxation change (wealth taxes, luxury carbon taxes) and regulations that would limit emissions.<sup>331</sup> In the past several decades, transnational businesses have been prominent voices in the conversation around

climate change, and through membership-based associations such as the World Business Council for Sustainable Development and the We Mean Business coalition they have their interests directly represented in climate negotiations. At COPs, large numbers of fossil fuel industry lobbyists are usually present, with COP26 being no exception.<sup>332</sup> Despite various initiatives in the business world involving certification, offsetting and corporate social responsibility (CSR), their actual impact on emissions remains unclear. Many have argued that while these initiatives might provide some small benefits, they only go as far as they are good for business—for example, addressing resource scarcity or improving public opinion, or by preventing harsher restrictions the state might impose on them—and that ultimately profit maximization is incompatible with addressing climate change.<sup>333</sup> One such example is the trend of climate philanthropy, a way for the super-rich to “shape the low-carbon transition in their image” and in the process legitimize extreme wealth (see Spotlight by Edouard Morena).

Similarly, the trend of CSR, which is widely criticized as being insufficient to bring about transformative change because it is not attentive to the structural conditions that lead to unsustainable development (see chapter 5).<sup>334</sup> Rather it creates a “never-ending business in transition” narrative, in which businesses are constantly seen as working toward sustainability but never actually arrive there.<sup>335</sup>

A report by the think tank InfluenceMap (2017) found that of the 50 companies with the most influence on climate policy, 35 were actively working against climate policy, both through lobbying activities such as engaging with government officials, making contributions to electoral campaigns and establishing revolving doors, as well as more broadly working to influence public opinion, through advertising, public relations and sponsoring research. On the other side, private businesses tend to only enter the clean energy sector after most of the risky and capital-intensive investments have been made by the state, or coherent and systematic policy signals are in place.<sup>336</sup>

As a result of these power asymmetries, vested interests influencing policy making and limiting regulation, as well as a lack of incentives through policies and regulations, international climate action is fraught with many roadblocks.

## 6. Conclusions

While mainstream development policy analysis has largely tended to focus on poverty rather than inequality, seeing poverty in isolation from broader distributional patterns and elite power, over the last decade this perspective has started to shift. Poverty has begun to be viewed in the context of extreme wealth inequality, the bottom of the pyramid as it were, with the 1 percent economy representing the top. This report argues that increasing economic inequality, in particular concentration of incomes and wealth at the top of the distribution within countries and globally, has repercussions for other types of inequalities (social, political and environmental) and for sustainable development outcomes including poverty reduction and climate impacts.

The chapter has shown that economic inequalities have followed different trends over the last decades, with within-country inequality rising (with some notable exceptions mainly in Latin America and sub-Saharan Africa) and between-country inequality decreasing. However, the data show that catching up was largely concentrated in Asia and driven by large economies such as China and India, whereas many countries have fallen further behind, in particular when using absolute measures of income inequality and poverty and more sophisticated measures of well-being and human development. We have also presented evidence on the positive impact of higher equality for poverty reduction. Finally, in contrast to previous beliefs, high economic inequality is increasingly seen as an obstacle to growth through a variety of channels, while being a key driver of our current environmental crisis (chapter 2).

While there is a growing consensus that the state should play an active role in reducing social and political inequalities, there is more controversy on the role of the state in reducing economic inequalities, as these are often seen as market outcomes reflecting legitimate differences in talent, effort and investment or as the result of good policies or good governance. However, it is also widely acknowledged that markets do not operate according to theory, as market power is highly unequal, and that state redistribution has made a major difference in social and economic outcomes in developed countries, and to a lesser degree in the

global South. This chapter has demonstrated that a range of factors drive economic inequalities, many of which are associated with power asymmetries and social injustice, shaping income and wealth distribution nationally and globally.

The picture becomes more complex when adopting an intersectional lens. The data show that the most vulnerable and marginalized groups are those who face intersecting economic and social inequalities, for example, women, LGBTIQ+ persons, particular racial or ethnic groups, elderly or young persons, persons living with disabilities, informal sector workers, rural populations and migrants. Their disadvantages are clearly reflected in lower social outcomes regarding income and nutrition, exposure to violence, education and health as well as social protection coverage and employment.

Finally, we have explored the political inequalities that underpin the rise of economic and social inequalities, and in particular their impacts on vulnerable groups and the environment. We have analysed the political influence of elites on policies and legislation through various strategies, including influencing the electoral process, establishing business networks, lobbying, controlling the media or outright state capture, as well as strategies to consolidate wealth and power. We have also presented evidence on elite perceptions regarding inequalities, which could be the basis for exploring their willingness to address them and how perceptions might be shifted.

To stop or reverse the increasing spiral of economic and social disparities and increase political equality, a combination of economic and social policies, and legal and political reform, is necessary, as well as reforms of the international trade, investment and financial architecture. Convincing and incentivizing elites to be part of a new eco-social contract is important, as is the strengthening of countervailing powers and the voices of the majority population and of marginalized groups. Concrete policies and strategies, as well as actors and coalitions who can support egalitarian reforms, will be discussed in chapters 4 and 5.

# Endnotes

- <sup>1</sup> Stewart 2013.
- <sup>2</sup> Jelin 2017; Therborn 2010.
- <sup>3</sup> Bourdieu 1984; Foucault 1976; Spicker 2020; Weber 1922.
- <sup>4</sup> Reygadas 2015.
- <sup>5</sup> Tilly 1999.
- <sup>6</sup> Crenshaw 1989.
- <sup>7</sup> Crenshaw 1991:1242.
- <sup>8</sup> Bastia et al. 2022.
- <sup>9</sup> Williams and Cos-Montiel 2021.
- <sup>10</sup> Bastia et al. 2022.
- <sup>11</sup> Kabeer 1994.
- <sup>12</sup> Cisgender is a term used to describe a person whose gender identity corresponds to their sex assigned at birth, while cisgenderism is an ideology that delegitimizes gender identities that do not align with assigned gender, for example through pathologizing and misgendering.
- <sup>13</sup> Holtmaat 2004.
- <sup>14</sup> Stewart 2020.
- <sup>15</sup> Malhotra and Kabeer 2002.
- <sup>16</sup> Birnbaum et al. 2017.
- <sup>17</sup> UN 1987, 1995, 2013.
- <sup>18</sup> UN 2003; UN Women 2019.
- <sup>19</sup> UN 2003.
- <sup>20</sup> Cook and Kabeer 2009; Razavi 2007.
- <sup>21</sup> Woodall 2021.
- <sup>22</sup> Cook and Kabeer 2009.
- <sup>23</sup> Daniels 1988.
- <sup>24</sup> Cecchini et al. 2015:41.
- <sup>25</sup> Woodall 2021.
- <sup>26</sup> Birnbaum et al. 2017.
- <sup>27</sup> ILO 2012.
- <sup>28</sup> The 2010 UNRISD flagship report (chapter 3) analysed ethnic and regional inequalities and their links with structural change (for example dependence on mining or export-oriented agriculture in particular regions), colonial and post-colonial development strategies (for example concentration of investments, employment and wealth in certain regions) as well as ecological and climate characteristics. In Brazil, for example, there is overlap between geography, race and socioeconomic performance, with the majority of Black and mixed-race Brazilians living in the poor Northeastern region. In Mexico, all states with significant Indigenous populations have lower per capita GDP than the national average, except for regions benefiting from mining or tourism. Complex overlapping regional, ethnic and religious inequalities are also found in Côte d'Ivoire and Ghana, creating a pronounced north-south divide. See also Ayelazuno and Aziabah (2021) on inequalities in higher education in Ghana; and Arellano-Yanguas and Mejía-Acosta (2020) on regional inequalities and the distribution of mining revenues in Latin America.
- <sup>29</sup> Holston and Appadurai 1996:188.
- <sup>30</sup> Jelin 2017; Milanovic 2016.
- <sup>31</sup> Hujo and Piper 2010.
- <sup>32</sup> MacLeavy and Manley 2022; Sharkey 2013; van Ham et al. 2014.
- <sup>33</sup> MacLeavy and Manley 2022.
- <sup>34</sup> Ortiz et al. 2022; Pathfinders for Peaceful, Just and Inclusive Societies 2021; Wike 2014.
- <sup>35</sup> Boyce 1994; Chancel 2017; Neumeyer 2011; Stiglitz 2012; Therborn 2013; Stewart 2014; UNDP 2019, 2020a; UNRISD 2010; Wilkinson and Pickett 2009.

- 36 Freistein and Mahlerlert 2016; Koehler 2015.
- 37 Lakner et al. 2020; Ostry et al. 2018; Zattler 2020.
- 38 Atkinson 1997.
- 39 Atkinson 1997; Milanovic 2016.
- 40 Galbraith 2016.
- 41 Huber et al. 2019.
- 42 Stiglitz 2012.
- 43 See, for example, Huber et al. (2019).
- 44 Chen 2019.
- 45 De Haan and Rogaly 2002; Möllers and Meyer 2014.
- 46 Hujo and Carter 2019a; Meagher 2022; Standing 2014.
- 47 Goudie and Ladd 1999.
- 48 Keeley 2015.
- 49 See, for example, Milanovic (2016) and Stiglitz (2012).
- 50 Alesina and Perotti 1996.
- 51 UN DESA 2022.
- 52 Bachas et al. 2021.
- 53 See Jensen (2019), who shows that a high employee share is associated with expansion of the income tax base and income tax revenue.
- 54 See, for example, Hollenbach and Silva (2019).
- 55 Moore and Prichard 2020.
- 56 Milanovic et al. 2007.
- 57 Williamson 2009.
- 58 Piketty 2014:398.
- 59 Chancel and Piketty 2021; this trend is also verified by data from the Organisation for Economic Co-operation and Development (OECD) countries, with the biggest gains for the 1 percent occurring in the United States and the United Kingdom (OECD 2014).
- 60 Hardoon 2017.
- 61 Oxfam 2022.
- 62 Bonesmo Fredriksen 2012.
- 63 Niehues 2018; Rühlemann et al. 2019.
- 64 Credit Suisse 2022.
- 65 Credit Suisse 2021.
- 66 Bauluz et al. 2021.
- 67 Anseeuw and Baldinelli 2020.
- 68 Anseeuw and Baldinelli 2020.
- 69 Bourguignon 2016.
- 70 Ocampo 2020.
- 71 Nayyar 2016.
- 72 UNCTAD 2021.
- 73 Milanovic 2016.
- 74 UN DESA 2020a.
- 75 Bangura 2019.
- 76 Peterson 2017.
- 77 Niño-Zarazúa et al. 2016, 2017.
- 78 Palma 2019.
- 79 ILO 2021a.
- 80 Palma 2019.
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- 82 Hujo 2013, 2019, 2020; Lustig 2018; Ortiz et al. 2020.
- 83 Clarke and Lipsig-Mummé 2020.
- 84 Phillips 2017.
- 85 Meagher 2019.
- 86 Braig et al. 2016.
- 87 Ashwin et al. 2020:8.
- 88 Meagher 2019.
- 89 Orlik et al. 2021.
- 90 Kim and Milner 2021.
- 91 Phillips 2017.
- 92 Phillips 2017.
- 93 Ashwin et al. 2020.
- 94 Ashwin et al. 2020.
- 95 Aguiar de Medeiros and Trebat 2017.
- 96 UNCTAD 2015.
- 97 Yu 2021:24.
- 98 Yu 2021.
- 99 Kesselring et al. 2019.
- 100 Epstein 2005:3.
- 101 Chiapello 2015.
- 102 Hujo and Lupo 2022; Kesselring et al. 2019.
- 103 Choudhary 2021.
- 104 Haile 2020.
- 105 Standing 2019.
- 106 Choudhary 2021.
- 107 IPES-Food and ETC Group 2021.
- 108 Independent Group 2019.
- 109 Bjornlund et al. 2020; UNCTAD 2021.
- 110 Fox and Jayne 2020.
- 111 Anseeuw and Baldinelli 2020.
- 112 White et al. 2019.
- 113 Kesselring et al. 2019.
- 114 ILO 2020a.
- 115 Next Generation Fellows 2021.
- 116 UN DESA 2020b.
- 117 Centers for Disease Control and Prevention 2020.
- 118 Kabeer 2010, 2014; Kurian and Singh 2020.
- 119 Plagerson and Ulriksen 2016; UNDP 2019.
- 120 Braig et al. 2016.
- 121 Bangura 2006; Cederman et al. 2013; Stewart 2011.
- 122 UN DESA 2022.
- 123 UNDP and OPHI 2020; Hughes et al. 2009; Hujo and Carter 2019b.
- 124 UN 2020b.
- 125 IWGIA 2021; UN 2020b.
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- 129 For a critique on this poverty measure see Vandemoortele (2002) and Reddy and Minoiu (2007).
- 130 World Bank 2020.
- 131 UN 2020a, 2021.

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- UN DESA 2020c; UNDP 2020b, 2022a.
- UNDP 2019.
- UN 2020a; UN DESA 2020a.
- Azcona et al. 2020.
- UNICEF 2021a.
- Unwin et al. 2022.
- Choudhary 2021.
- Choudhary 2017; Development Initiatives 2020.
- Neff et al. 2009.
- The Lancet 2020.
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- WFP 2020.
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- Cooke 2019.
- UN Women 2020.
- Hillis et al. 2016.
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- UNRISD 2016b; UN Women 2020.
- UNESCO 2022.
- McIlwaine 2013; McIlwaine and Moser 2007.
- UN and World Bank 2018.
- Chigateri et al. 2016; Rojas Scheffer 2022.
- Deering et al. 2014.
- UN OHCHR 2019.
- TGEU 2021.
- When referring to survey results, we use the acronym employed by the survey. In all other cases we use the acronym LGBTIQ+.
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- FRA 2020.
- EJI 2021.
- Waiselfisz 2014.
- On policing and human rights see Bowling et al. (2005). On a joint statement of UN experts against a recent rise in policy brutality, see UN News (2021).
- Frank et al. 2019.
- Bueno et al. 2019.
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- Barros 2008; Cano 2019; Correll et al. 2007; Peeples 2020.
- Timerman 2014.
- Seiner 2020.
- Londoño 2019.
- Hersher 2016.
- Associated Press 2022.
- Crush 2022.
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- UN News 2020.
- Plagerson 2021.
- See, for example, Gregorio and Lee (2002), Haveman and Smeeding (2006), Heckman et al. (2016) and Psacharopoulos and Patrinos (2004).
- Hertz et al. 2007.
- Leone 2019.
- While girls are more likely than boys to never attend school, boys in many countries are at higher risk of failing to advance and complete their education. 132 million boys were out of school in 2020, driven by factors such as poverty, need to work, gendered norms and expectations, streaming of classes, gender segregation and gender-based violence. The gender parity index data for tertiary enrolment showed 88 men for every 100 women enrolled at the tertiary level in 2019 (UNESCO 2022).
- Cuevas-Parra and Stephano 2020.
- UN DESA 2020b; Next Generation Fellows 2021.
- UNICEF 2021b.
- UN 2021.
- UN DESA 2020b.
- UN DESA 2020a, 2020b.
- Hujo and Carter 2019b.
- Carter and Hujo 2021.
- Spending cuts in public university education in Africa were recommended by the World Bank based on the argument that the social return on higher education was low compared to primary, secondary and private higher education (Chachage 2007).
- McCowan and Bertolin 2020.
- McCowan and Bertolin 2020.
- ILO 2021a; Marginson 2016.
- UNESCO 2017.
- Guzmán-Valenzuela 2016.
- Plagerson 2021.
- Dorling 2019; Therborn 2013; Wilkinson and Pickett 2009.
- UN DESA 2020a.
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- Banati et al. 2020; UNICEF 2021c.
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- American Cancer Society 2022.
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- Hamed et al. 2020; Kapadia et al. 2022; National Academies of Science, Engineering, and Medicine 2020.
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- Bendelow et al. 2003; Doyal 2001; Hamberg 2008; Lagro-Janssen 2007; McMurray et al. 1991.



214 Hamberg 2008.  
 215 Hamberg 2008:238.  
 216 Bradford et al. 2013; WHO 2015.  
 217 Ben-Shlomo and Kuh 2002.  
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 219 WHO 2015.  
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 2012; Meyer 2016; Plöderl Tremblay 2015.  
 222 Krieger 2020.  
 223 Akuno 2020.  
 224 Kesselring et al. 2019.  
 225 Gerrish and Watkins 2018.  
 226 Watkins and Gerrish 2017.  
 227 Mkandawire 2004.  
 228 ILO 2021a.  
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 available year); see also Hujo and Carter (2019b), UN  
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 230 ILO 2021a.  
 231 ILO 2021b.  
 232 Cook and Hujo 2014.  
 233 Razavi et al. 2022.  
 234 Dadap-Cantal et al. 2021.  
 235 Mkandawire 2005; Razavi et al. 2022; UNRISD 2010.  
 236 Amundsen 2020; Pires 2022.  
 237 De Schutter 2022 :7. See also Kidd et al. (2020)  
 arguing that low quality of public services undermine  
 trust in governments and hence social contracts and  
 discourage people from paying taxes.  
 238 Grosh et al. 2022.  
 239 Cook and Hujo 2014.  
 240 ILO 2021a (note: data refers to 2020 or latest  
 available year).  
 241 UNRISD 2016a.  
 242 ILO 2017.  
 243 Ouma and Adésinà 2019.  
 244 Rohregger et al. 2021.  
 245 Pires 2022; Molyneux 2007.  
 246 De Schutter 2022.  
 247 UNRISD 2010:29.  
 248 UNRISD 2010:30.  
 249 ILO 2021a; UNRISD 2010.  
 250 ILO 2020b.  
 251 Workers' organizations are increasingly demanding  
 fair remuneration. To determine what is fair and  
 compare it with measures such as minimum wage,  
 the concept of the living wage has been developed,  
 defined as wage levels that allow a full-time worker,  
 working normal hours, to provide for their family via a  
 wage that covers basic food, housing, transportation,  
 health, education and some other costs, as well as  
 a small proportion for discretionary expenditure and  
 savings (for further elaboration and data see Utting  
 and O'Neill [2020]).

252 ILO 2020b.  
 253 See, for example, ILO 2015.  
 254 FRA 2020.  
 255 FRA 2014, 2020.  
 256 Leppel 2020.  
 257 IBGE 2019.  
 258 Wilson and Darity Jr. 2022.  
 259 Gaentzsch and Zapata-Román 2020.  
 260 Next Generation Fellows 2021.  
 261 Berar Awad 2021.  
 262 Berar Awad 2021; Chacaltana and Dasgupta 2021.  
 263 ILO 2020b.  
 264 Mishel et al. 2015.  
 265 Figures for West Germany until 2008 (Dustmann  
 et al. 2014); in 2015, a minimum wage policy was  
 introduced, but real wages continued to decline in  
 2020 and 2021 in the context of rising price levels.  
 266 Both figures in purchasing power parity terms.  
 267 ILO 2019.  
 268 ILO 2020b.  
 269 See, for example, Walther (2020).  
 270 ILO 2021a; Ladd and Bortolotti 2020; Plagerson  
 2021.  
 271 Bartels 2008; Gilens 2012; Lupu and Warner 2022;  
 Pontusson 2018.  
 272 OECD 2013; Offe 2000; Van der Meer 2017.  
 273 Freedom House 2020; Human Rights Watch 2021;  
 Nyamnjoh 2020.  
 274 Stewart 2011.  
 275 Dubrow 2015.  
 276 Stewart 2011.  
 277 Dahl 2006; Stewart 2011.  
 278 Khan 2012.  
 279 Dal Bó et al. 2017.  
 280 Bartels 2008; Cagé 2020; Gilens 2012; Pontusson  
 2018; Traber et al. 2021.  
 281 Lupu and Warner 2022.  
 282 Cousin et al. 2018; Mäder et al. 2010.  
 283 Bartels 2008; Cagé 2020; Gilens 2012.  
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## Intergenerational distributive conflict and the social contract



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The Covid-19 pandemic has underscored the dynamics of intergenerational distributive conflicts, which are often neglected in policy formulation. The largest costs of containing the virus, in the form of losses of market incomes and increased burdens of unpaid care, have been felt by the working-age population—those who spend a significant portion of their time earning income and caring for others in order to support dependants. These costs were incurred to protect public health and, at least in the early stages of the pandemic, specifically to protect the lives of the most vulnerable, including older segments of the population. Calls to open up economies were often countered by arguments that such a move would cost many older persons their lives, starkly illustrating the cross-generational distribution of costs and benefits.

The dynamics of intergenerational distribution are changing. Half the world's population currently live in countries with below replacement fertility—a situation that will eventually translate into shrinking populations, especially if there are not significant changes with regard to immigration from countries that still have expanding populations.<sup>1</sup> This, combined with rising life expectancy, has produced demographic shifts, with older persons comprising a growing share of the population in many economies. This group contributes less, on average, to the productive activities of the market economy but stakes a claim to an increasing share of market production and public services.

These demographic shifts can stress existing social policy arrangements, such as pensions and health care systems, when an expanding older generation stakes claims on the incomes of a dwindling working-age population. For instance, pension benefits financed out of current government revenues, such as pay-as-you-go systems, become difficult to sustain when taxes collected from those in their prime productive years must support a

growing older population. These intergenerational tensions become more complex when we add children to the mix. Children have no opportunity to accumulate prior savings and have limited scope to negotiate binding agreements with regard to how they will be raised. Children also demand a share of market and non-market output greater than their productive contributions. Social contracts in which parents invest in children with the understanding that their children will support them later in life would mediate these distributive tensions. Yet such informal social contracts are often unenforceable and crack under the pressure of demographic, social and cultural shifts. Transfers from adult children to ageing parents represent one kinship-based benefit of raising children associated with traditional, patriarchal social contracts. As those social contracts weaken, the family-based benefits of having children fall, reinforcing downward pressures on fertility rates.

Intergenerational distributive conflict also pertains to generations yet to be born. The irreversible depletion of natural resources and ecosystem services, such as the capacity of the environment to assimilate greenhouse gases, will affect the economies of the future. Often, economists classify these environmental concerns as “externalities”—social costs that exist outside of market transactions. The standard policy prescription would be either to impose a tax on the harmful activity (such as fines for pollution) or to develop a new market to “internalize” the externality (for example, tradable carbon emissions permits). The existence of externalities demonstrates why purely market-based solutions to resolve these tensions cannot work. But that is not the full story. Markets cannot sufficiently mitigate these tensions because we cannot negotiate on fair terms with future generations—that is, people who do not yet exist. These distributive dynamics have serious implications for social and ecological sustainability.

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**Economic policy needs to shift from a narrow emphasis on market production and exchange—specifically the growth of gross domestic product—to a broader goal of social provisioning that redefines the economy to include both market and non-market production and processes. Such broader understandings of economic activity would explicitly acknowledge the profound interdependencies between countries and people, and, significantly, across generations.”**

The policy implications are far-reaching. At the most basic level, there is a need to assess the impact of demographic shifts and intergenerational distributive dynamics on existing social protection systems, the fiscal sustainability of government programmes, and systems of social reproduction, specifically those activities that involve raising and investing in future generations. Both traditional family-based systems and the collection of policies and institutions that constitute modern welfare states face potentially serious challenges as we enter uncharted demographic territory.

This suggests that the focus of economic policy needs to shift from a narrow emphasis on market production and exchange—specifically the growth of gross domestic product—to a broader goal of social provisioning that redefines the economy to include both market and non-market production and processes.<sup>2</sup> Such broader understandings of

economic activity would explicitly acknowledge the profound interdependencies between countries and people, and, significantly, across generations.

Such a paradigm shift requires a new focus on sustainability—economic, social and environmental—that goes beyond government efforts to prop up markets when they fail. For instance, the precautionary principle could be applied when our current choices have potentially devastating consequences for the lives and choices of future generations. Instead of asking how today’s markets can be used to “fix” these problems by tweaking private incentives, this approach would prohibit these harmful actions until we learn more about their real long-term consequences.

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### Endnotes

<sup>1</sup> United Nations 2017.

<sup>2</sup> Heintz et al. 2021.

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## From affirmative action to collective action: Confronting legacies of racism in Brazil



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Brazil is one of the most unequal countries in the world. This inequality was produced in a historical process through the control of various forms of capital—economic, political, cultural, educational, military, technological and symbolic—by a specific social group: white, rich, heteronormative men.<sup>1</sup> Inequality has been further exacerbated by patriarchal norms (machismo), institutional patrimonialism and structural/institutional racism.<sup>2</sup> In this Spotlight I look specifically at racism.

Racism is not an anomaly in the Brazilian reality; it is not something dysfunctional, something to be overcome through institutional advances. It is the defining element of social, economic, cultural and educational relations established in Brazilian society. In the early days of Portuguese colonization in the 1500s, white men were granted privilege and access to wealth by the state, receiving land, titles of nobility and power over institutions. This process continued after independence in 1822 and well into the period of the Brazilian Republic. Today, the family, the state, market structures and even many civil society organizations operate based on the normalization of this white dominance.

The reproduction of inequality in Brazil depends on the premise of an alleged meritocracy: those who are in high social and economic positions have attained them because of their competence and talents. With this markedly ideological premise, Black Brazilians—who make up 55 percent of the country's total population—have not had (and continue not to have) proportional representation in universities, the judiciary, diplomatic posts, management or similar positions of power.<sup>3</sup> For example, among Brazil's 500 largest companies, less than 5 percent of executives are Black; in the judiciary, only about 16 percent of judges are mixed race and less than 2 percent

are Black. At the same time, almost 70 percent of Brazil's 750,000+ prison population is Black.

Racist logic prevails in relation to migrant populations as well, where white migration—especially North American and European—has been historically seen as positive and valued by dominant groups as part of the logic of the whitening of local society. At the same time, Latin American and African migration is often viewed with contempt and distrust by dominant groups. In the case of Haitian migrants, who make up the largest group of Black migrants in Brazil, the discrimination is even more severe as it is worsened by the stigmatization of Haiti as a country marked by poverty, political instability and natural disasters.

Fortunately, in the last two decades, a significant portion of civil society and non-governmental organizations committed to broadening democratic and citizenship rights in Brazil have understood that, in order to overcome inequality in all its dimensions, the material and symbolic consequences of racism must be treated as defining elements of the political agenda. The institutional and power structures that fuel racism must be transformed.

Some steps toward achieving this have been made, beginning with the implementation of affirmative action policies in federal institutions in the early 2000s. Similarly, universities, the judiciary and electoral processes have begun to establish quotas for Black and Indigenous participation. This racial and ethnic diversity—the presence of empowered members of historically marginalized communities in the daily life of institutions—beyond addressing long-standing injustices, is also strategic in that it makes space for new practices and perspectives for overcoming structural racism. Still, affirmative



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action must also reach the job market: Black youth, upon graduating from university, must have the same opportunities to reach top positions in the private sector as their white counterparts. Several large Brazilian companies have been voluntarily implementing strategies in this direction.<sup>4</sup>

Another important step to address these inequalities is the improvement of urban infrastructure (schools, health facilities, water, sanitation, roads, energy and Internet), provision of other services (financial, cultural or legal), and income transfer programmes benefitting marginalized territories, which have historically been secondary recipients of these policies. More progressive governments such as that of the Workers' Party (Partido dos Trabalhadores, PT) have followed an agenda leading in this direction through actions that are deemed an “inversion of priorities” of what historically has been the focus of Brazilian policies, just as they have sought to expand credit opportunities for Black entrepreneurs. Indeed, the state continues to play a strategic role in guiding the creation of public policies that expand the rights of peripheral and marginalized populations.

However, it is also true that the PT governments which held power from 2003 to 2016—the year when the constitutional coup to overthrow President Dilma Rousseff was orchestrated by the National Congress—were somewhat contradictory in their reform policies. On the one hand, they achieved great success in reducing poverty, bringing tens of millions of people into the labour market and expanding access to universities and technical schools, among other policies geared toward marginalized populations. They also opened space for civil society organizations to carry on their struggles for affirmative action. On the other hand, they were less successful in reforming the legislature and the judiciary and did not implement substantive reforms regarding tax policy, electoral rules or other political reforms that would increase opportunities for political participation beyond the quota system mentioned above. Accordingly, the rich remained privileged by state structures and, paradoxically, became richer and more powerful without any constraints imposed on them through public or private institutions.

The simultaneous control of the state and of corporate structures by economic and political elites made way for the constitutional coup in 2016. This was followed by a process of delegitimization of politics, driven largely by the media and key actors in the judicial system. In 2018, this brought about the election of an authoritarian, far-right president who openly defends Brazil's brutal military dictatorship (1964–1985) and its use of torture. In this challenging context, it became evident that a democratic agenda capable of empowering poor and marginalized groups would only move forward because of citizen engagement. Since 2019, thousands of political education and mobilization collectives promoting social rights and democracy for all have been created. This activism has been a key instrument in disrupting the institutional practices that continue to drive inequality in Brazil.

Certainly, it will not be enough to simply defeat Bolsonaro in the 2022 presidential elections and remove the far-right political forces from office. It is necessary to build a new political project that confronts and subsequently dismantles the structures that reproduce inequality. This will be a challenge for generations to come, and the Instituto Maria e João Aleixo as well as a broad coalition of progressive civil society organizations and actors are completely embedded in it.



Bringing awareness to the phenomenon of Black migration in Brazil is a central component of this agenda. Brazilian racism makes no distinction between Black migrants and their Brazilian brothers: all are deprived of rights and treated unequally. In practice, however, Black migrants lack networks, information and resources to make their voices heard and claim their rights. Thus, encouraging the organization of migrants, strengthening their collective associations and seeking to construct a unified agenda and coalition that fights for their rights is essential. It is part of the global process of overcoming the still present effects of slavery, colonization and our subordinate integration in global markets.

This struggle belongs to all Brazilians, all migrants and all peoples around the world. For, in the name of human dignity, all people have the right to live in a world defined by justice, equality, solidarity and love. This last element, given the intolerance and hatred of fascist forces, has become an increasingly fundamental theme in the fight for our humanity. Love, in its various expressions, is a political issue: it should be granted the same importance as material themes and placed at the center of our agenda for social transformation. Without abandoning rationality, the defeat of barbarism requires new narratives, new gestures and new practices. May we learn to build these with love, intelligence, energy and a readiness to fight.

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## Endnotes

- <sup>1</sup> Bourdieu 1995 [1987].
- <sup>2</sup> Institutional patrimonialism refers to the state transfer of economic resources and means of power toward a privileged social group, for example through tax, credit and interest rate policies, investment in urban infrastructure, the allocation of services in affluent neighbourhoods and privileged access to public offices.
- <sup>3</sup> In Brazil, the category of “Black” encompasses the population that self-identified as “brown” or “Black” in the census carried out by the Brazilian Institute of Geography and Statistics (IBGE) and other forms that ask for the respondent’s racial and/or ethnic identification.
- <sup>4</sup> Good examples are Banco Itaú, the largest private bank in Brazil, which has established a diversity committee with a focus on racial diversity. Natura, the biggest cosmetics enterprise in Brazil and one of the biggest in the world, as well as Magazine Luiza, a retail corporation, have similar arrangements.

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## Sexual contract or gendered arrangement?



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Everything that surrounds us in our social life, everything, from myths to laws, absolutely everything alludes to sexual difference. Each culture establishes meanings, attributes and characteristics that correspond to women and distinguishes them from those concerning men. And although there are very marked differences between one culture and another, they all have sexual difference as the organizing principle of the “arrangement between the sexes.”<sup>1</sup> Undoubtedly the sexual difference between females and males (determined by chromosomes) has been the basis of all the various symbolization processes through which each culture has developed its codes concerning what it means to be a woman or a man. Humans have constructed their social orders and established their social interactions based on these codes. Thus, a binary division, supported by symbols and practices, separates humans into two main groups and transmits the belief that there are some tasks, spaces, emotions and attributes that correspond to the group named “women” (basically females, but not all of them) while others correspond to the group named “men” (basically males, but not all of them).

All gender arrangements refer to sexual difference, but this difference itself does not determine the type of arrangement. Human sexual difference is the same in all cultures around the world (99 percent females and males and 1 percent intersex), but social roles and the place human beings occupy in society as women and men are very different. For example, if we compare the social place of women in lay and democratic societies (such as Iceland) with societies governed by religious leaders (such as Afghanistan), we find a gap that lies not in biology itself but in the way sexual difference has been symbolized. Although sexual difference in Afghanistan and in Iceland is the same (females and males), the beliefs about what is intrinsic to women and men are quite different, and this is what produces different types of social inequality.

Symbolic codes express beliefs about the dual nature of the human condition, and there are cultures that interpret women’s subordination as “natural” instead of understanding it as the result of an “arrangement.” Considering that females bring new lives into the world, many arrangements give women the social responsibility for tasks associated with the production and sustenance of life, often resulting in their economic and political subordination.

Even though numerous elements of this arrangement have changed through history, and different cultures have incorporated certain elements of others in a rich process of cultural appropriation, there is a continued belief that men should be engaged in tasks relating to government and defence, and women should do those relating to bringing up children, caring for the elderly or sick and domestic work. Until the resurgence of feminism, this arrangement was justified by the argument that the sexual division of labour was “natural.” Beginning in the 1970s, with the advent of second-wave feminism, social science and political philosophy researchers analysed the gender arrangement, and one interpretation that gained broad acceptance was the notion of a “sexual contract.”<sup>2</sup> Based on this concept, it was argued that sexual inequality was the result of a reorganization of patriarchy in the modern era and that, although modern democracies are based on citizens’ freedom to subscribe to economic and political contracts, underlying these contracts was a persistent pact among men to share unrestricted access to women’s bodies, and especially to have access to their sexuality and domestic labour, providing something similar to a domestic slave at home.

Fortunately, other feminists have gone beyond the limitations associated with the sexual contract concept and have developed a more nuanced explanation of the social, educational and political

rules that have defined the undeniable power imbalance between the public and domestic spheres. Social reality is much more complex, and for some time now feminists with different perspectives have been claiming that the so-called *sexual* division of labour is not about sex but about gender, in that it is a social arrangement that limits equal access for women and men to work in both the public and private spheres. Although years ago the distribution of traditional tasks—where women were responsible for care and men for government and defence—were always related to biological differences, and especially to women’s procreative physiology, today the use of machinery has made male strength relative, and medical advances, together with the use of contraception, have reduced women’s procreative vulnerability. Today it is anachronistic to talk about the sexual division of labour.

It is not a question of denying incontrovertible realities; without doubt, human males are generally taller, broader and more muscular than human females, and moreover the gestation process does not develop in their bodies. However, acknowledging the materiality of biology does not imply accepting biological determinism. The clear set of bio-sexual differences between females and males is not what produces social, economic and political inequality; rather, it is a complex mixture of cultural beliefs and practices about what is inherent in men and inherent in women. Therefore, as these beliefs are unconsciously internalized, they serve as an explanation for inequalities that continue to be deeply rooted and give a shared excuse for the lack of more equitable social arrangements.

Reliance on biological arguments about a sexual contract fails to consider the strength of culture and the human psyche. Analysing the traditional division of labour as a “problematic arrangement” instead of as a sexual contract allows us to address the suffering and destitution of countless people and develop public policy measures aimed at eliminating its discriminatory effects. The admission that sexual difference exists does not legitimate deterministic conceptions but forces us to visualize specific problems. Currently, the hegemonic gender arrangement, with its differentiated workload for men and for women, makes it impossible to reconcile family and work spheres, while it also shapes the economy and supports a social model that produces different types of oppression and exploitation.

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Even though more rigorous analyses have been around for a long time, a majority of people in the world continue to interpret the existing division—women in care work and men in government and defence—as something “natural.” The expression “sexual contract” feeds this normalization by emphasizing sexual difference rather than the social construction of gender, making it difficult to understand that what exists is a symbolic contract with material consequences for daily life. There have been, and continue to be, political efforts aimed at balancing the unequal relations between women and men and, more recently, including people with different gender identities. These efforts have ranged from reforming laws to institutionalizing anti-discrimination measures, but few have actually pushed forward cultural policies and public debates with new representations of what it means to be a woman, or a man, or a non-binary human being. Although sexual difference has an indisputable materiality, human beings also have a psyche and, sometimes, the identification process goes in an unexpected direction. There are no psychic characteristics inherent to females or males, but biologically there are some, crucial to the maintenance of humanity! In this sense, the political

perspective that declares women and men equal as human beings—but not identical—is not enough if there is insufficient clarity about the ways in which the symbolization of sexual difference fosters the social acceptance of the so-called sexual division of labour.

One of the main challenges for addressing the socioeconomic and political inequality that exists between women and men as social groups lies in the difficulty of understanding that those inequalities between humans do not derive from sexual difference but from cultural norms relating to gender arrangements. The uses and customs of these norms conceal relations of domination and mutual exploitation behind the belief in a complementarity analogous to the procreative complementarity that exists between females and males. In order to progress toward another type of arrangement with fairer interactions, it is crucial to visualize clearly that a human essence determined by chromosomes does not exist, and to accept that cultural norms are the consequence of socio-historical processes, which are susceptible to transformation. This is not easy, since even people who experience oppression may tolerate it as something “natural.” Gender norms function as social coercion that is not perceived as such, and they are underpinned by the very people who adopt them without question. *Symbolic violence* is the name given to the phenomenon by which people accept, against their own interests, the schemes and values that oppress them.<sup>3</sup> This symbolic violence is a “soft” violence that inscribes cultural gender norms on the body, on the psyche and on social relations.

Today we can see how the symbolic order has normalized the supposed superiority of men in certain societies and legitimized women’s political subordination, while in other societies, the minority, the socio-political principle of social equality disregards sexual difference. Therefore, we need to be clear that it is not a “sexual contract” that produces inequality between women and men; it is in fact the symbolic conceptualizations, present in many religions and political regimes and instilled in the minds and unconscious of human beings, that produce beliefs and practices that foster gender inequalities.

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### Endnotes

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## Who owns the news? How media capture exacerbates inequality



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Media organizations seeking to fulfil their democratic mission and hold power to account have always faced threats from political and economic elites. But pressure on news outlets has evolved in different directions, sometimes adopting subtle forms that can amount to media capture, defined by Alina Mungiu-Pippidi (2013:40) of the Hertie School of Governance in Berlin as a situation in which media are controlled “either directly by governments or by vested interest groups strongly tied to politics.”

What has changed the media landscape over the last 20 years is the globalized nature of media ownership and the rise of technology giants acting as gatekeepers of information. These fundamental shifts have paved the way for new forms of media capture, affecting both coverage and access to information.<sup>1</sup> They have also radically changed the media landscape, causing massive job losses in traditional media in many countries around the world while new digital outlets have emerged. In the United States, newsroom employment fell 26 percent between 2008 and 2020; the majority of this decline occurred in newspaper newsrooms, with employment falling 57 percent during that period.<sup>2</sup>

Against a global backdrop of growing inequality, increased polarization and rising right-wing populism, understanding how governments and elites maintain their hold on the public is crucial to address the power gap in society. Censors wielding red pens and governments dictating publicly what can or cannot be covered may be rarer these days, but powerful influences continue to place constraints on independent journalism.

How did this happen? One part of the story is the concentration of wealth in the hands of the few has allowed many of these billionaires to buy up media outlets. Paradoxically, the advent of the Internet

was once heralded as an exciting opportunity to democratize access to information and encourage media diversity. Exerting control over the numerous new outlets emerging online would be impossible, it seemed at the time.

In reality, while online media organizations have multiplied thanks to lower barriers to entry, advertising revenues have plummeted across the media landscape, leaving both legacy media organizations and new outlets to scramble for limited financial resources. They have become easy targets for the financial houses that bought them and then failed to invest in local news. In the United States, Alden Capital has become notorious for buying storied newspapers such as the *Chicago Tribune* and then gutting the staff.<sup>3</sup> In Hungary, changes in ownership led to increased advertising from government and reduced coverage of corruption.<sup>4</sup> After the 2008 financial crisis, foreign investors pulled out of investments in Bulgaria, the Czech Republic, Romania and other countries, which allowed local oligarchs to move in.<sup>5</sup>

Tech companies such as Google and Meta (Facebook) have not only siphoned off an important share of ad revenues that used to sustain legacy media, but they also control the distribution of information through algorithms that are less than transparent, as well as infrastructure.

Media outlets now rely for distribution on the very platforms that have undermined their business model, potentially making them more reluctant to hold these influential companies to account. In addition, large tech companies undermine consumer privacy rights and often reap substantial benefits from monetizing the data they collect from individuals who follow news coverage.

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Rasmus Kleis Nielsen (2017:34) of the Reuters Institute for the Study of Journalism at Oxford University listed “power, public service, profit” as traditional motives for media ownership. With media organizations struggling to survive, profit is no longer a strong enough incentive for ownership, making it more likely that individuals with deep pockets will buy news outlets to promote a political agenda or vested interests.

Around the globe, media independence is under heavy pressure. In countries such as Hungary and Turkey, authoritarian governments have successfully encouraged cronies to purchase media organizations as a way of controlling the political narrative. There are also numerous examples of corporations worldwide working in more subtle ways with political parties to promote favourable coverage.

The concept of media capture emerged some 15 years ago, framed by economists who argued that political influence has an impact even if countries

have adopted the fundamental principle of freedom of the press. Maria Petrova (2008) of the Institute for Political Economy and Governance in Barcelona argued in 2007 that media capture could worsen inequality, particularly if the media outlets were captured by wealthy individuals, who, unlike politicians, cannot be voted out of power.

Foundations and philanthropists have stepped in to support struggling news organizations and enable them to fulfil their intended function. While the grants they offer can provide a lifeline for media outlets, they do not guarantee long-term sustainability. Furthermore, philanthropic organizations have their own biases and can be selective in the topics they support, resulting in another form of media capture.

These dramatic changes in the media landscape and the rise of disinformation have turned the spotlight on news journalism as a public good. As countless local news outlets have stopped operations, causing greater inequality in news coverage, interest in public funding to support independent reporting has grown. Several countries have long funded media organizations: the United Kingdom supports public broadcasting with the BBC and Germany with ARD and ZDF.

With the right regulations and multi-stakeholder committees in place to ensure public funding is not abused and that it reaches media organizations contributing to diversity and democratic accountability, public funding can be an effective tool to support quality journalism. In the wrong hands, however, government involvement can lead to new forms of capture. The European Union has been seeking consultation on a planned Media Freedom Act that could contain significant protections for journalists as well as measures to prevent capture. But it will need to be implemented Europe-wide, rather than by individual countries, in order to have teeth. Another bright spot is the creation of the Pluralis fund, based in Amsterdam and supported by a group of foundations, which will invest in non-partisan media outlets in Europe.

Significant events such as the end of a war or toppling of a dictator can have a profound impact on the media. Political transition can free the media or offer new opportunities for capture. The Covid-19 pandemic, for instance, served as a pretext for some authoritarian governments to tighten their control



over the media. At the same time, the public health crisis also motivated governments in many countries, including Canada, France and Indonesia, to step in to save struggling media organizations by expanding or introducing schemes, including providing direct grants, subsidizing journalists' salaries and offering vouchers for subscriptions.<sup>6</sup>

As democratic institutions are being eroded around the world and right-wing populism flourishes, protecting media independence and its ability to speak truth to power is more important than ever. To mount an effective defence, however, we must first understand media capture in all its forms and devise new strategies to combat it.

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- <sup>2</sup> Walker 2021.
- <sup>3</sup> Coppins 2021.
- <sup>4</sup> Szeidl and Szucs 2021.
- <sup>5</sup> Stetka 2012.
- <sup>6</sup> Schiffrin et al. 2022.