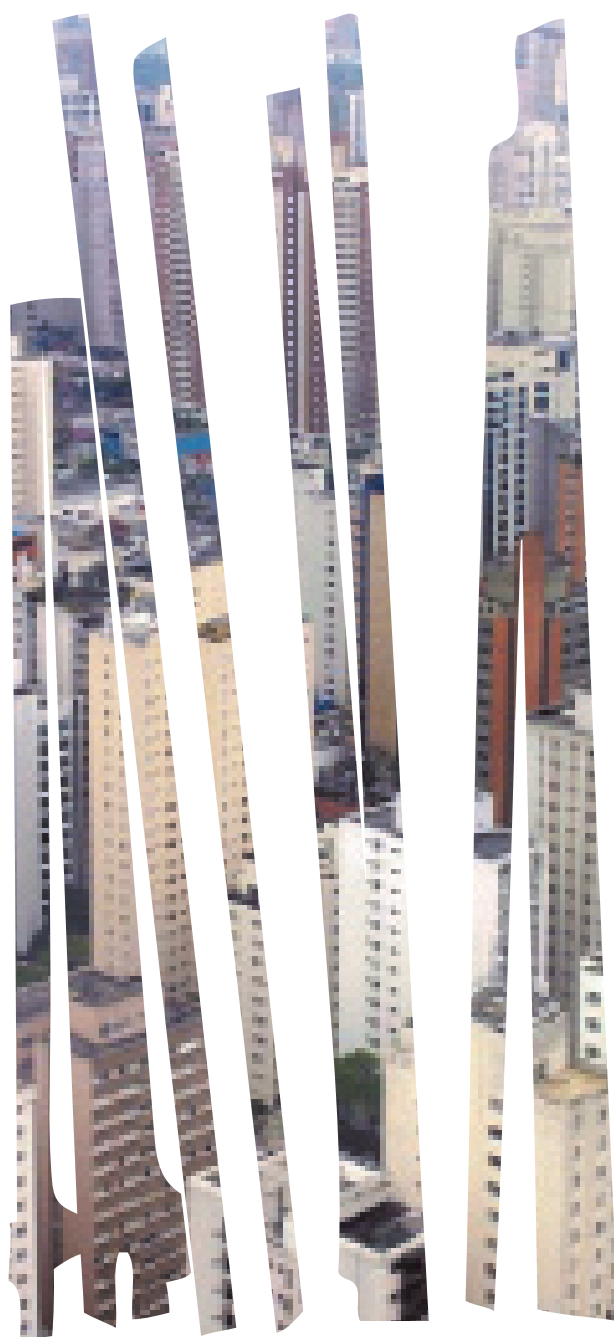


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**Inequalities and Latin America**  
From the Enlightenment to the 21st Century

Göran Therborn



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## Inequalities and Latin America

### From the Enlightenment to the 21st Century

Göran Therborn

#### **Abstract**

Inequality emerged as a social concern during the Enlightenment and was seen as violating the norm of human equality. Three main development narratives were generated following this concern: one of long-term equalization (de Tocqueville), one of polarization (Marx), and one of modern rising inequality followed by equalization (Kuznets). Although each of these narratives was able to score some points, none of them fully captured the actual trajectory of the inequality curve which is currently bending upwards towards more inequality. 21st century inequality studies are taking off in new directions, multiscalar, multi-dimensionally rooted in recent moral philosophy, and more focused on causal mechanisms and forces. Since early modernity a centre of economic inequality in the world, Latin America has a special relevance to inequality studies. Nevertheless, it is currently the only world region with a predominant tendency of equalization.

**Keywords:** Social Inequalities | Enlightenment | Latin America

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## 1. Inequality, Modernity, and Latin America

### 1.1. The Spectre of Modernity

Distributive justice is an ancient concept developed by Aristotle in his *Nicomachean Ethics*. However, inequality as a major form of injustice is a modern discovery. Although radical “heretical” movements in the socio-religious upheavals of early European modernity – like the German *Wiedertäufer* of the 17<sup>th</sup> century and the Levellers in the English revolution a century later – fought for this-worldly equality, it was mainly during the 18<sup>th</sup> century Enlightenment that inequality became an important political concern. In 1753 the Academy of Dijon announced a prize to be awarded to the best essay about the origins of inequality among men. Among the essays that didn’t win the competition was one authored by Jean-Jacques Rousseau. His *Discourse on the Origin and the Foundations of Inequality Among Men* became almost immediately a classic of enlightened political philosophy and was rapidly translated into German, English, and later into Russian, inter alia. Rousseau’s (1753/1971: 145) message was that inequality stands in contradiction to the law of nature and he opposed the idea that a “handful of people are overflowing of superabundance [regorge des superfluidités] while the famished multitude is lacking the necessary.” This was a new social, political, and moral conception. Aristotelian distributive justice was not concerned with inequality, but merely with hierarchies and with distribution “in accordance with worth” (Raphael 2001: 46-47).

Only a radical minority followed Rousseau in his socio-economic conclusion. But his denunciation of man-made “moral or political inequality” and of its legal underpinning of privilege became mainstream ideas during the Enlightenment. Equality was enshrined in the two major political documents of the epoch: the American Declaration of Independence in 1776, “We hold these truths to be self-evident, that all men are created equal ...,” and the French Declaration of the Rights of Man and Citizen of 1793, “All men are equal by nature and before the law.”

Latin America had a part in the European Enlightenment, albeit a peripheral one, and was touched by its egalitarian currents. These currents were channeled both “from above”, through the “Enlightened Absolutism” of the Spanish Bourbons and of Pombal in Portugal, and “from the middle”, through trans-Atlantic intellectual circuits, theological as well as secular. As recent historiography has highlighted, this late colonial Enlightenment had an important impact on the politics of Latin American independence, providing conceptions and institutions for wide male political participation in the central cities where so-called *cabildos* started the process (Demélas 2003; Sabato 1999).

Through the Napoleonic occupation of most of Iberia and the defeat of both of its colonial crowns, Latin America was thrust into uncharted waters which, in very devious ways, led to independence. Particularly of concern to us here are the constitutional effects of political (in)equality. All the more striking, then, is the wide political franchise. In the 1812 Cadiz Constitution of a trans-Atlantic Spanish realm neither estates nor income barriers were mentioned. Domestic servants and day laborers were excluded from suffrage as “dependents” (like women and children) as well as slaves, but not artisans. All Indians were in principle included – a fact that stands in stark contrast to their exclusion in the US. The single ethnic barrier excluded the *castas*, people held to be of African descent, even if they were free men. To their credit, the Latin American delegates wanted them included, but Spanish racism kept them out.

The constitutions of independent Latin America expanded political equality, usually including the *castas* and freed slaves. This was also the case of the new “Imperial” Brazil which, by the end of the Empire, had a primary electorate of about one million voters. Now, primary voters did not mean much in 19<sup>th</sup> century Latin America for two reasons. First, all national voting was indirect and the electors in the second round tended to be upper class. Second, in an unstable setting of small-scale civil wars and *coups d'état*, arms were often more important than votes. Indeed, in this limited period of time, political inequality could, and did, assert itself through arms as well. Armed militias were a colonial legacy, even including militias of freed Blacks in colonial Brazil (Graham 1999: 354f). In independent Latin America, plebeian and multi-ethnic national guards or militias were very important institutions producing political mobility as well as instability.

However, the deeper roots and dimensions of inequality were not addressed in liberal-cum-conservative Latin America, namely, the distribution of mining rents and of land, the hierarchical racialization – very different from the US-American White-Black dichotomy –, and the urban-rural divide. In the second half of the 19<sup>th</sup> century racism got stronger and more aggressive – like in Europe and the US – and the solution to the social problems was often seen as a kind of gentle genocide, submerging the non-Whites by waves of “whitening” through European immigration.

And colonial Ibero-America had built empires of inequality.

The German Enlightenment scholar and explorer Alexander von Humboldt visited New Spain, current Mexico, in 1804-05 and was shocked by its stark economic inequality (v. Humboldt 1822/1966). Brazil was the last major country to abolish slavery in 1888. True, already before that date, Brazil had a substantial class of freed Blacks, but no significant movement of collective emancipation.

## 1.2. The Modern Trajectory: Conflicting Interpretations

It was not until modernity that inequality became value-laden and controversial. Previously, it had been so self-evident as not to be thought about. Therefore, rather than to cut a single path of truth, we should expect social science to reflect this controversiality and to have, in its best representatives, some empirical foundation. We may then distinguish three major and very different social science readings of economic inequality, two of the nineteenth and one mainly of the twentieth century. All three of them have been superseded now, but they were once considered classics in their field – and they have never met, neither in person nor in the literary space.

### *Reading the 19th Century*

The first was Alexis de Tocqueville who made two, now classical, contributions to social science, *The Ancien Régime and the French Revolution* (1856) and *Democracy in America* (1835-40). Often passed over in sociological canons, he is a major figure in the canons of political science. As a liberal French aristocrat, de Tocqueville was primarily interested in what a latter-day reader might call the transition from feudalism-cum-absolutism to capitalism. From his primarily legal-political perspective, modernity was an age of equality:

”I see that goods and bads are allocated rather equally in the world. Great wealths are disappearing, the number of small fortunes is growing; desires and pleasures are multiplying; there are no longer extraordinary prosperities nor miseries without remedy.”

*De la démocratie en Amérique* (1840) (Tocqueville 1840/1961, II: 452)

Writing only a couple of decades later, Karl Marx came to an absolutely opposite conclusion. It was the epoch of capitalist economics and capitalism meant inherent tendencies of mounting inequality.

“With the ever declining number of capital magnates, who usurp and monopolize all the advantages of this transformation process, the mass of misery, pressure, subjugation, degeneration and exploitation is growing...”

*Das Kapital* (1867) (Marx 1867/1921, I: 728)

It is a sobering thought for social diagnostics that two so eminent scholars could see the world so differently. They looked at the world from very different perspectives of time and had different objects, as well as objectives, on their mind. Tocqueville

focused on the outcomes of the two great 18<sup>th</sup> century revolutions, the French and the American. He was mainly interested in politics and in law. Politically, he was a liberal, at ease in the liberal July Monarchy. Marx concentrated on analyzing the new economic system brought about by the Industrial Revolution in the wake of the dismantling of the aristocratic order. His search lamp centered on the socioeconomic conditions of a new class, the industrial proletariat. As a socialist intellectual, his political objective was to bring the new working class into action. It was probably relevant, too, that the two analysts were looking primarily at different countries, Tocqueville at France and the USA, and Marx at Britain.

To a large extent, then, Tocqueville and Marx were talking past each other, and later historiography of the social science has hardly ever tried to relate and compare them. However, from their radically different starting points the diagnoses of Tocqueville and Marx did meet as the quotations above illustrate. So, who was right and who was wrong?

They both were, we may say with the hindsight of latter-day research. Tocqueville was right in that the French Revolution had done away with the legal and political inequalities of caste and estate of the *Ancient Régime* and that the rising power of the United States was, in the first half of the 19<sup>th</sup> century, in almost all respects – except for Southern slavery and the Western genocide of the Indians – much more equal than the Old World of Europe. Moreover, the French Revolution had cut down economic inequality, a result not fully undone neither by the Restoration nor by the July Monarchy (Morrisson 2000: table 7b).

19<sup>th</sup> century Britain was one of the most unequal North Atlantic countries, clearly more so than Prussia, but on par with post-revolutionary France (Lindert 2000: table 1 and Morrisson 2000: tables 6c and 7b). It was home to the “dark satanic mills” (William Blake) of early industrialism. There was a significant long-term rise of the real income share of the richest five per cent in England and Wales in the period from the mid-18<sup>th</sup> century until the eve of World War I and a marked increase in the wealth share of the top one per cent from early 18<sup>th</sup> century until about 1875, after which it stayed on a high plateau until the mid-1920s. The first half of the 19<sup>th</sup> century also saw a widened dispersion of labor earnings (Lindert 2000: 179ff). Capitalist industrialization generally produced more inequality in Europe, as in France in the 1830s-1860s and in Germany after 1870 (Morrisson 2000: 234, 236). In Sweden and the Netherlands economic inequality began to rise, like in England already in the 18<sup>th</sup> century or in the Netherlands in the 17<sup>th</sup> century (Morrisson 2000: 229, 238). In the United States, inequality augmented strongly in the course of the 19<sup>th</sup> century, although the turning



points of the distribution curve have not yet been dated exactly. Inequality of health and life expectancy also increased between 1790 and 1870 (Lindert 2000: 192).

In sum, Marx was right and with regard to socioeconomic conditions more so than de Tocqueville.

### *The End of the Short 20<sup>th</sup> Century*

My intention here is not to sketch a history of inequality, but rather to highlight the existence of different perspectives and to hint at how they can be coped with. But it would not be illuminating to end with putting Karl Marx on a pedestal of correctness. We also know, by now, that the Marxian tendency of polarization did not continue in the 20<sup>th</sup> century. It went on internationally – globally until the 1950s and between the richest and the poorest countries it is still ongoing –, but nationally, within all the centers of capitalism, it was reversed into equalization. This reversal started in Europe with World War I and in the USA with the Depression of the 1930s and reigned until the oil crisis of the 1970s, although its concrete trajectories varied across nations. The most plausible explanation seems to be that the systemic shocks of the two great wars and the Depression destroyed a great deal of accumulated wealth and privilege and that a systemic rise of the strength of the working class, through the development of industrial capitalism – foreseen by Marx, but falling short of his socialist prediction –, helped with the challenge of the off-centre Communist revolutions.

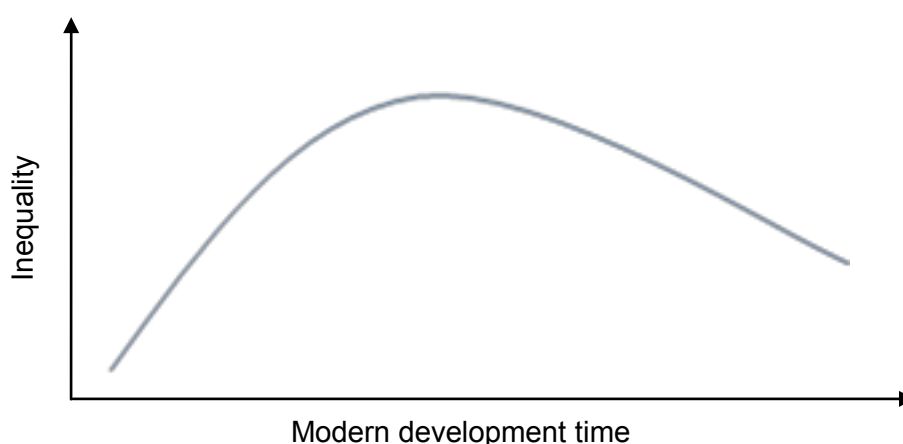
In the 1950s, in the heyday of economic developmentalism and sociological modernizationism, a great American economist and economic historian, Simon Kuznets (1955), presented a hypothesis about the historical development of inequality. Because of its great success, it became known as the “Kuznets curve” and can be taken as the third great reading of the modern trajectory of inequality. Allowing for nationally variable time scales, Kuznets believed that in modern time inequality took the shape of an inverted U-curve. Economic growth and industrialization initially caused an increase of the share of people working in high productivity sectors, with high income leading to higher overall inequality. Later, with further economic growth, the rest of the population would catch up and inequality would fall.

To what extent this “conjecture” (Kuznets 1955) ever captured the actual distributive processes of the short 20<sup>th</sup> century remains controversial, among economists as well as among historians. What is undeniable is that from about 1980 onwards the overwhelming, if not universal, tendency of the centers of capitalism has been that of rising income inequality. The curve is bending upwards again (Cornia 2004). The turn

has been most pronounced in the US and in the English speaking centers in general, driven by the rise of the income share of the very richest, ten percent, five percent, one percent, and 0.1% of the population (Atkinson and Piketty 2007: 539ff).

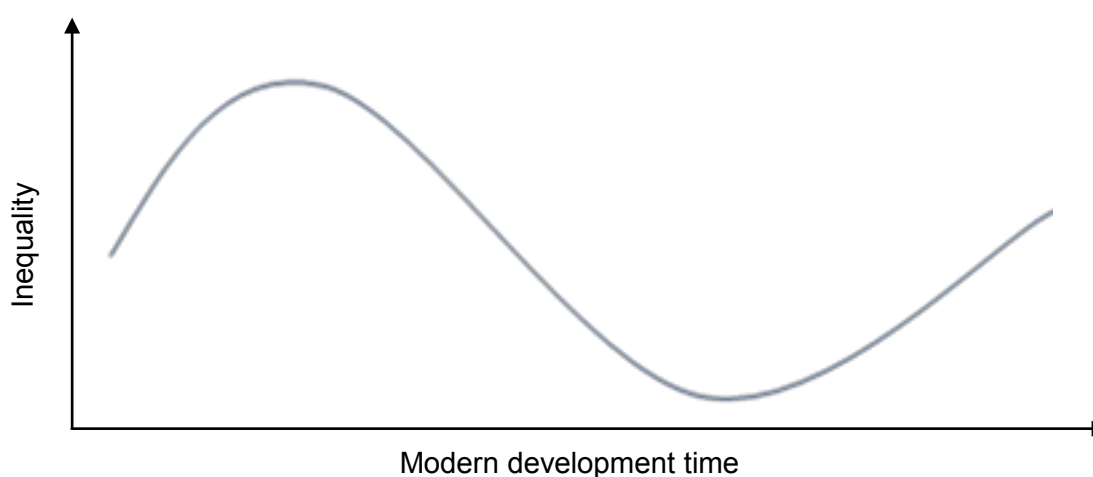
Figure 1: Stylized Income Inequality Curves of Developed Countries, mid-19<sup>th</sup> century to 20<sup>th</sup> century.

### 1.1. The Stylized Kuznets Curve of Modernization, Inequality First Rising, then Declining



Source: Kuznets (1955)

### 1.2. The Stylized Actual Curve of Late 19<sup>th</sup> -20<sup>th</sup> Century Inequality in the Rich Countries, best illustrated by the UK and the US.



Sources: Cornia (2004), Atkinson and Piketty (2007)

In other words, the legacy of the twentieth century is a return of inequality.

### 1.3. Latin America in the History of Inequality

Though touched by Enlightenment's legal-political egalitarianism – as we saw above – late colonial Latin America was economically extremely unequal. The German Enlightenment scholar Alexander von Humboldt was shocked by it, more than his French fellow aristocrat Alexis de Tocqueville was impressed by North American equality a few decades later. His income figures for the ecclesiastical hierarchy of New Spain are truly remarkable. The ratio of the income of the Archbishop of Mexico – which for some years was only a ninth of the mining rent of the Count de Valenciana and normally between a third and a fifth of it – to an ordinary clergyman of Guanajuato was more than 1000:1 (v. Humboldt 1822/1966: 83, 85). That hierarchy may be compared to the British one of 1688 where the ecclesiastical range of income was 26:1 (admittedly a difference somewhat evened out as referring to, on the one hand, the average income of 26 spiritual lords and, on the other, to “lesser clergymen”). Two hundred British temporal lords had an averaged income four hundred times that of a laborer or outservant (Maddison 2007: table 5.9b). True, as v. Humboldt noticed, Mexico and New Spain were extraordinarily unequal in Hispanic America. The rich in Lima, Havana, or Caracas were much less rich, but he provides no systematic comparison.

Not much is known, at least through this writer, of the 19<sup>th</sup> and early 20<sup>th</sup> century developments of inequality in Latin America. An extraordinary study using data on male height from conscription and passport records shows that vital inequality increased strongly during the Mexican *Porfiriato* as the masses grew shorter and the elite taller (López-Alonso 2007). In terms of wealth distribution, Brazil at least did not share the European-North American experience of 20<sup>th</sup> century equalization. The share held by the richest decile, 75 per cent by the end of the 20<sup>th</sup> century, was similar to, and probably somewhat higher than, their share at the end of the 18<sup>th</sup> and 19<sup>th</sup> centuries (Pochmann et al. 2005: 28). The rich appropriation in Brazil was originally smaller than in England where the top five per cent held 82 to 87 per cent of all marketable net worth between 1670 and 1925, but only 38 per cent from 1976 to 1989 (Lindert 2000: table 2).

What is clear is that Latin America followed the Euro-American turn to more inequality after 1980. The 1970s were a decade of equalization, then reversed around 1980 and accelerated to more inequality in the 1990s (Londoño and Székely 1997: 10ff).

#### *Perspectival Changes*

The end of the past century also involved other intellectual turns of perspectives on inequality, apart from the challenge posed by the unexpected change of income dis-

tributions. Studies of intergenerational social mobility and of (in)equality of opportunity had been a core of hard empirical sociology bringing out international commonalities and minor variations of industrial societies. This had always been largely driven by an interest in industrial structural change and by a concern with the distribution of its opportunities. Though still playing their trade, these studies seem to have lost momentum in the new deindustrialized societies. Their landmark remains John Goldthorpe's and Robert Eriksson's monumental *The Constant Flux* (1992).

Mapping topographies of social inequality was a central concern for distinctive waves and groupings of 20<sup>th</sup> century sociologists, amateurs as well as professionals. Without doing proper justice to all major efforts, we may single out four approaches. One was a US mainstream interest in "social stratification", conceived as social ranking or allocation of social prestige. It emerged empirically in the interwar period, through local small-town studies of which W. Lloyd Warner was the lodestar, and received theoretical formulation in the new functionalist sociology of the 1940s by Talcott Parsons and by Kingsley Davis and Wilbert Moore. After World War II, with the help of new sample survey techniques, it mutated into national pictures of occupational prestige by Alex Inkeles and others. (A whiff of that era has been caught by Lipset and Smelser 1961: 10-11 and part 3.) A second, critical minority current, power elite studies, also had its centre in the US. It began at the local level of "Middletown" by the Lynds in the 1920s and 1930s (Lynd and Lynd 1937) and carried on to a national scale through the writings of C. Wright Mills (1956), followed by William Domhoff and others. In Britain, thirdly, class distinctions and discussions of them constituted a national sport of wide-ranging interests after the Second World War, running from upper versus non-upper class language to child poverty, attracting free-lance writers as well as sociologists and social historians. (A brief and crisp, if not comprehensive, overview by an accomplished historian is Cannadine 1998.) Finally, there was a neo-Marxist wave of class mapping – of the occupational structure of contemporary capitalism – by militant intellectuals as well as by committed academics with interest in finding and gauging the potential forces of radical social change. Its high tide was in the 1970s. Class maps were drawn in almost all developed capitalist countries, and West Germany had the most elaborate extra-academic project in this regard, the *Projekt Klassenanalyse*. Academically and internationally by far the most influential cartography was designed by Erik Olin Wright (1997) at the University of Wisconsin at Madison, USA.

At present, but not necessarily for ever, all these efforts have fallen out of the limelight. Stratification presupposed a consensus of local or national ranking which looks suspicious in current fragmented and segmented societies, although the term is now also used by a specialized academic current interested in social mobility, but not in

class (Treiman and Ganzeboom 2000). Power elite studies have lost their luster in a world where the power of deal-makers and war-makers is publicly flaunted and, also, because they seem to have failed to grasp the institutions and the institutional processes which keep elite outsiders, like Barack Obama, for instance, on the pre-given institutional course. The British fascination with class is surviving, but so is its ambiguity, illustrated by the 2011 plan of the BBC to run a new soap opera on the class theme of *Upstairs and Downstairs*. The pertinence of conventional Marxist class analysis is fading with the central decline of the industrial working-class and it is challenged by the different socio-political parameters in (still) off-centre countries like China, India, and even Brazil and Mexico.

Summing up, egalitarian social analyses are returning to the Enlightenment's focal concern with inequality after a 19<sup>th</sup> and 20<sup>th</sup> century main preoccupation with class – but with more intellectual heritage, from the recent past as well as from the history of modernity.

## 2. A Field of Wider Horizons

### 2.1. The New Legacy

The outgoing 20<sup>th</sup> century left extraordinarily rich theoretical contributions to inequality studies. It is now up to us to harvest those through hard practical, i.e., empirical work.

One of these contributions was the breakthrough of Feminism as a social force as well as a high caliber intellectual current from, say, Juliet Mitchell (1966) to Martha Nussbaum (2000). The gender and the sexual – with a great intellectual debt to Judith Butler (1990) – dimensions of inequality can no longer be ignored. Feminist debates also raised the question of “difference” and of its relation to inequality.

Another contribution was the cerebral input of moral and social philosophy, pioneered by John Rawls (1971) and deepened as well as connected to social science by Amartya Sen (1992, 2009). Rawls explored the far-reaching societal consequences of justice as fairness, a classical Anglo-Saxon Liberal trope. Sen raised and dissected the bold question, “Inequality of what?” and argued for “capability” and “the power to do something” as the best answers to concerns of equality and justice. Poverty, then, means capability deprivation which may operate in many ways, not only through lack of income. (In)Equality became in the late 20<sup>th</sup> century a central topic of philosophy. It has enriched our understanding of these issues enormously. The main interface has so far been between philosophy and economics, but sociologists still have much to learn from the philosophical discourse – sociologists did in the past, by the way.

On the empirical front, the most important recent development has been that of social epidemiology or social medicine. From eminent scholars of epidemiology, like Richard Wilkinson (2005; Wilkinson and Pickett 2009; Marmot 2004), we have learnt that, and to some extent even how, inequality kills. The stress hormones generated by organizations and arrangements of social inferiority increase susceptibility to various illnesses, and they increase the probability of premature death. Here is an extraordinarily important interface of medicine and sociology, a frontier of social investigation and still a sparsely populated area.

A major change of macro perspective was brought about by the world system theory (Wallerstein 1974) which opened our eyes to systematic thinking and the study of the inter-relationships between different parts of the world, in other words, of global inequality. The 1990s fascination with “globalization”, even though it often contained a very critical stance on the new inequalities being produced, usually lacked the fruitful, if

perhaps overly rigid, systemic approach of the world system studies. Feminism opened the windows, but we have also learnt from the deep wounds of existential inequality and humiliation in other contexts: from poor and handicapped persons subjected to “eugenic” treatment, like sterilization or prohibition to marry, from children of “sub-valid” parents taken away from their families and thrust into the White world, from Scandinavia to the Antipodes, including deportations from Britain to Australia and Canada.

While “race” is an old category of Anglo-American inequality research, ethnicity has recently become a broader and more central category. This derives from two major social changes. One is the rise and growing organization, interconnectedness, and assertiveness of indigenous “First Nations”. The other is the late 20<sup>th</sup> century resumption of large-scale intercultural migration.

Sociology is an oecumenical discipline, and much of its strength lies in its openness to many kinds of impulses. But from within itself, it has made at least two important new analytical contributions. The first one, developed by Pierre Bourdieu (1979, among many other works), was to bring culture into the centre of inequality studies. In a sense, this was part of the original US-American stratification program, but Bourdieu gave it a characteristically competitive and conflictual twist. Even more important were his concepts of habitus and field. “Habitus” provided a concept for the cultural-existential disposition of humans. “Field” delimited arenas of cultural competition.

Late 20<sup>th</sup> century sociology also argued the analytical importance of finding mechanisms of social change or reproduction (Hedström and Swedberg 1998). This emanated from the late James Coleman, but extended beyond his rational choice crowd. Charles Tilly (1998) took it seriously in a penetrating analysis of enduring categorical inequality.

### *A Sociologist's Lessons*

The enormously rich and diverse contributions named above were, in most cases, intellectual outcomes of the vibrant radical culture of the late 1960s, of “1968” – shed of the latter’s utopian and mimetic aspects. For the 21<sup>st</sup> century study of inequality we may draw at least three broad summary lessons from them.

The first lesson is the complexity, the multi-scalarity as well as the central moral and social importance of inequality. It has to be approached as a multidimensional phenomenon, and its moral implications should not just be taken as a natural starting-point for a study. Their far-reaching furrows need to be further explored and reflected

upon. Inequality also operates on various scales, from the household or institution to the global.

The second lesson is the importance of searching for general causal mechanisms, capable of taking us beyond ad hoc explanations into a more systematic understanding of how inequality is produced and reproduced, and how more equality can be brought about.

Thirdly, a transcendence of **methodological monoculturalism** is crucial. New insights of medicine and psychology have to be brought into social studies. And, within their own faculty walls, the latter have to become transdisciplinary. A fruitful interaction of economists and sociologists has already developed with respect to the distributive functioning of labor markets. Recent political science interest in political (in)equality may stimulate a more systematic attention to power and politics in theoretical as well as in microsocial<sup>1</sup> empirical work on inequality.

## 2.2. Inequality of What? Three Basic Dimensions of Inequality

The difference between a difference and inequality is, first of all, that the latter presupposes some kind of commonality. Two men may be unequal, but a man and a moonlight are only different. Secondly, on the basis of some commonality, inequality implies an evaluative rupture of this commonality. Such an evaluation may be cognitive or performative, e.g., referring to two unequal students. However, the noun “inequality” derives, as a rule, from some normative commonality. Thirdly, then, inequality refers to the violation of a norm of equality. That is why inequality became a social and political concept only in the Enlightenment with its this-worldly assumption of some basic commonality and equality of human beings. Before that, Christianity and Islam had a tenet of an elementary equality of human souls. Sometimes, this had some very important consequences for the side of heaven and hell, for example as for the de facto, even if officially inconclusive, outcome of the Valladolid theological disputation in 1550-51 that American Indians had souls and therefore should be treated not as animals or slaves, but as humans (Elliott 2006: 72, 76-77). However, equality remained fundamentally a theological concept, a rule not bearing upon intra-human social arrangements. Fourthly, the kind of inequality that concerns us here is a social construction, another discovery of modernity, and no natural inequality – however cruel and unjust they may seem, say, between blind and clear-eyed humans.

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<sup>1</sup> Taking macro politics, in the form of state policies and institutions, into account is already an old tradition.



However, the norm of equality that underlies concerns with inequality is neither absolute nor, very often, even explicit. How can we then get at a grasp of inequality? We do not need an absolute norm of equality. We may stick to a relational and comparative discourse of more or less (in)equality, while comparing conditions and programs of change (Sen 2009: 94ff). In order to get to the question what kinds of inequality matter, we better raise a fundamental question about the human condition. What is it like to be a human being (Sen 2009: 414)? What kinds of equality are required for each of us to be human to an equal extent, with all our different physiques and our different interests and values? Equality of capability to do the things we want is Sen's answer. It is a good philosophical answer, the best on offer as far as I know, but it is too philosophical to be a handy target of empirical investigation and of policies for change. Sen's approach has been specified in the UN Human Development Reports and their Human Development Index, comprising life expectancy, education, and income (GDP). But that seems to be too dovetailed to fit standardized international reporting and too narrow for a research program on inequalities.

If we start again from the question "What is it like to be a human being?" there seem to be at least three non-controversial answers:

Human beings are **organisms**, bodies, susceptible to pain, suffering and death.

Human beings are **persons**, living their lives in social contexts of meaning.

Human beings are **actors**, capable of acting towards aims or goals.

From this, we can derive three kinds of inequality:

(1) **Vital inequality**, referring to socially constructed unequal life chances of human organisms. This is being studied by assessing mortality rates, life expectancy, health expectancy (expected years of life without serious illness), and several other indicators of child health, like birth weight and body growth by a certain age. Surveys of hunger are also used.

(2) **Existential inequality** of the capabilities or allocated degrees of freedom of persons. This is a concept which has not yet acquired recognized burgher rights in the sociological community. But several of its manifestations have already been and are being studied: women kept down and confined by patriarchy and sexism, colonized peoples by colonizers, immigrants and ethnic minorities, people with handicaps and disabilities, homosexuals by intolerant heteros, "polluting" castes by higher castes, occupiers of the lower rungs of most hierarchies. Examples abound. And they all refer

to unequal allocations of personal autonomy, recognition, and respect, to denials of an existential equality of human persons.

Existential inequality can be gauged and compared by looking into institutional arrangements – incl. dissecting official discourses –, into patterns of social interaction, practices of power holders and of keepers of expert knowledge, such as doctors, and by tapping personal experiences through surveys as well as through qualitative interviews.

(3) **Resource inequality** providing human actors with unequal resources to act. We may here distinguish two aspects:

Bases, “capitals” to draw upon:

Income, wealth

Culture, education

Social contacts or “connections”

Power. Inequality of power is so far only rarely included into studies and analyses of social inequalities. But it is certainly pertinent and, in Latin American history, armed power has been a very important resource of social action.

Access to opportunities, referring to conditions of possibility. How important this is to human actors is best studied over time:

As life-course trajectories and

As inter-generational mobility

The three dimensions interact and intertwine and should always be suspected of doing so. But nor should it be forgotten that they are irreducible to each other: not only do they refer to distinct dimensions of human inequality, but also, each has its own dynamic and the dimensions do not always co-vary. For instance, in the rich countries, intra-national income inequality declined strongly from the end of World War I to circa 1980, while vital inequality – in the UK which has the best data on this score –, measured as the mortality rates of age 20 to 44 among different occupational classes, actually increased between 1910-12 and 1970-72 (Therborn 2006: table 1.12). Or the place of Latin America in the world: while Latin America is the most persistently unequal region of the world in terms of economic resources, there has, for a long time, been much less existential inequality there than in, say, South Asia with Amerindian citizens instead of “Untouchables” and polluting castes, and with weaker, now largely eroded, patriarchy which is still reigning in most of South Asia.

### 2.3. The Production of (In)Equality

Inequality can come about in different ways. It is, in fact, possible to identify a small number – it seems that four is enough – of recurrent processes, of social mechanisms, through which inequality is produced and reproduced in an infinite variety of contexts. For each of such processes or mechanisms, there is a corresponding opposite, working in the opposite direction. Strictly speaking, we are not so much concerned with any absolute equality or inequality. An inequality-producing mechanism leads to more inequality and an equality-producing one to less inequality or more equality.

(1) **Distanciation**, that is, running ahead or falling behind, versus **Rapprochement** or Catching up. This should not necessarily be interpreted in terms of individual achievement as it often starts running from a privileged access to opportunities, whether through information, connections, previous training, or experience. The so-called Kuznets Curve was based on distanciation followed by rapprochement.

(2) **Exclusion** and **Inclusion**, processes which should be conceived as variables of raising or lowering barriers as well as of closing or opening doors. Citizenship is both, including some people in a citizenry, while excluding others. Discrimination is exclusion, while affirmative action is inclusion, e.g., by quotas or supply of targeted extra education.

(3) **Hierarchization** versus **Empowerment**. One hierarchy no longer permeates a whole society, as castes once did in India or estates in Europe, but hierarchy remains a major feature of formal organizations, although it has been challenged. Subordinates have been empowered by trade unions, by consultation schemes, and sometimes by judicial interventions against maltreatment and harassment.

(4) **Exploitation** versus **Redistribution**. Exploitation may be defined as the resources of A being produced by the toil or the sacrifice of B. But in an enterprise labor process, how much is exchange of wages for jobs and how much is exploitation? If you do not believe in the labor theory of value, it is difficult to answer that question. It would better be left open for debate. Important to keep in mind is that redistribution by the nation-state became a very important distributive mechanism in the second half of the past century, in Europe and North America, in, even if little, Latin America and the rest of the world.

The mechanisms have different moral and political implications, and their application is therefore hotly controversial. Was the rise of Europe, and later the USA, in the

world an effect of surging ahead on the Industrial and Scientific Revolutions, or was it due to, above all, a ruthless exploitation of Latin America and other parts of the world? Exploitation is the only mechanism which is virtually indefensible in rational, universalistic discourse. It must be denied. Hierarchy may be defended as a mechanism of efficiency and exclusion as only the other side of inclusion. Inversely, distancing is the most difficult mechanism, though not impossible from a communitarian standpoint, to be attacked on egalitarian grounds. The large increase of inequality in the core of capitalism in recent decades is mainly an effect of financial distancing, which may explain why it has received so little resistance.

It is also important to pay attention to the psychological aspects of the above named processes. That is, how they affect the self-image and the self-confidence of actors. Their psychological effects are a very important part of the cumulative effects of the distributive mechanisms, creating either downward spirals of fear, self-doubt, missed opportunities, failures, and more fear and self-doubt, or upward positive ones of self-confidence, risk-taking, eagerness to test new opportunities, success, rewards, and more self-confidence and -esteem.

## 2.4. An Explanatory Framework

Mechanisms are important because they show us how things are brought about and how they, for instance, existing inequalities, can be changed. But they are not sufficient as explanations because they get their energy and force from somewhere else. It is this “somewhere else” which we shall try, if not to capture fully and definitely, at least to circle in.

Three clusters of explanatory variables then seem to be crucial:

### (1) Global History

Properly done, this should include the socio-cultural geology of the current world or region (Therborn 2011: ch.1). In the Latin American case, it may first concentrate on the institutions and ethno-social patterns of the *conquista* and the colonial allocation of mining and land rights followed by the location of the independent sub-continent in the British, French, and US spheres of interest. World system location may be another way of summing up.

### (2) Current Global Processes

(2.1) Flows of trade, capital, people, information (incl. all kinds of ideas), and matter (like pollutants). Capital flows have tended to increase inequality in receiving countries, while their trade flows appear to have no systematic distributive effect.

(2.2) Institutional global-national entanglements with the UN (e.g., the Mexico Women's Conference in 1974) and with the IMF/World Bank. The two have usually had opposite effects on inequality: involvement with the UN has decreased existential gender inequality, while the IMF/WB has increased income resource inequality

(2.3) Action, concerted or imperial, currently of little distributive effect, but Cold War transnational geopolitics showed it can be significant.

### (3) National Processes

These processes are nowadays all affected by international developments, but their persistent inter-national variation demonstrates their resilient national character.

(3.1) Demography, the birth rate in particula

(3.2) Economic performance (growth)

(3.3) Politics – power and social forces – and Policies of Distribution

See further Therborn (2006) with display of empirical evidence.

## 2.5. Possibilities of Equalization

Suppose we are interested in more equality, what possibilities are there? We should look out for:

### *Forces of demand*

Labor and popular-labor alliances have been the most important redistributive force and are most globally spread, although strongest in Western Europe. In Latin America, they have often been enclaved and isolated or corralled from above, an effect of the regional class structure without a strong industrial centre. But they were decisive in Peronist Argentina and represented the core of the original, finally successful, Lula coalition in Brazil.

Feminism has been an important movement of existential gender equality, most influential in North America, Oceania, and Northwestern Europe. Of all the historical surges of international Feminism, the Latin American movement has been later and weaker than others.

Ethnic and racial movements took, for a long time, mainly the form of brief rebellions and usually crushed. The US Civil Rights movement of the 1960s started a new international cycle of sustained collective organization and action. In parts of the region such movements have re-shaped the political landscape, decisively in Bolivia in the 1990s-2000s, very importantly in Ecuador from the 1990s onward, significantly, but

rather enclaved, in the rest of Latin America in the 2000s, from Chile to Mexico.

It is unlikely that working-class movements will grow in strength in most of the Americas (as well as in Europe). The influence of progressive Feminism – as opposed to that of rightwing female politicians – is currently on the wane. Only in a couple of more countries – like Guatemala and Peru – is a major, and not just sectoral, ethnically based egalitarian current envisageable. Is there a chance of some “new civic alliance” for equality? It is not inconceivable against the background experiences of human rights mobilization, of social fora, and the demonstrable economic and social dysfunctionality of existing inequalities. But nor is there strong evidence for a prediction.

### *Forces of supply*

Not every egalitarian reform had to be snatched from the teeth of a rapacious ruling class. Sometimes there have been forces of supply from above. A mainly European and Japanese variant of this has been a sense of *noblesse oblige*, one nation Toryism in English, and/or calculations of the benefits of national cohesion. In Latin America, in most of the times lacking a secure upper class, this phenomenon has been rare.

Instead, Latin America developed a more plebeian, but still top-down variety in the form of nationalist populism. Vargas in Brazil and Cárdenas in Mexico may be seen as the classics of the 1930s, Perón as the climax of the late 1940s, and Chavez as the main current upholder of the tradition. But the top-down, autocratic, and personalistic character of typical nationalist populism posits limitations both to its sustainability and to its egalitarianism.

Equality in Latin America would most probably stand a better chance if social movements could be met by some developmentalist-managerial egalitarianism.

### *Favorable conditions*

In retrospect, we may identify conditions propitious to equalization.

Total war or the threat of it: the two world wars destroyed a great deal of accumulated wealth, and the Second generated the British welfare state. The Cold War with its Communist challenge and its threat of a new world war requiring total popular mobilization unleashed radical policies of redistribution, including US backing of profound land reforms in Japan, South Korea, and Taiwan.

The Depression of the 1930s wiped out a great deal of speculative capitalist wealth, thereby significantly contributing to equalization. Whether the recent prickling of the

financial bubble will have any enduring distributive effects remains to be seen.

Latin America kept largely outside the world wars and was more peripherally than centrally affected by the Depression. The Cold War did spawn the reformist “Alliance for Progress” in the wake of the Cuban revolution, but it was soon overtaken and replaced by repressive responses. As we noticed above, Brazilian data indicate that the major moments of North Atlantic equalization passed over Latin America. In the 1950s and 1960s, Latin American income inequality actually increased (Cornia and Martorano 2010: 2). Particularly favorable external conditions are not in sight, but the latest decade has shown that financial prudence together with regulation, favorable terms of trade, and keeping up international competitiveness provide considerable room for reforms.

The forces of supply of and demand for equality finally meet in the nation-state and its willingness and capacity to redistribute. Here, clearly, the Latin American states can be found wanting when compared to Western Europe, including to Latin Europe, and even in comparison with the United States.

Table 1: State Redistribution of Income, early mid-2000s. Gini coefficients before and after taxes and state transfers.

	Before taxes & transfers	After taxes & transfers
Argentina (1998)	0.51	0.40
Bolivia	0.44	0.41
Brazil (1997)	0.56	0.49
Colombia	0.53	0.50
Mexico	0.49	0.45
Germany	0.44	0.28
Sweden	0.49	0.23
USA	0.46	0.34

Source: Cornia and Martorano (2010: table 8).

State redistribution can be a very powerful mechanism even under capitalist conditions. With regard to market income, Sweden is as unequal as Mexico, but public redistribution takes away more than half of market income inequality, while in Mexico the decrease is only eight per cent. Even under the Bush administration, US taxation was more redistributive than that of any Latin American government, reducing income inequality by almost a fourth, to be compared with 22 per cent in Argentina and 19 per cent in Costa Rica.

### 3. Latin American Inequalities in Today's World

The multidimensionality of inequality manifests itself also in Latin America's standing in the world. Latin America is the most inegalitarian part of the world when it comes to income, which – although Latin America took its part in the Atlantic equalization of the 1970s – is a colonial legacy basically unaffected by the massive equalization in Europe and North America in the first two thirds of the twentieth century (Londoño and Székely 1997: figure 1). However, the region is not the most unequal with respect to vital inequality or the distribution of education. The latest Human Development Report by the UNDP (2010a: ch. 5) has made some complex but revealing new measures of inequality. It has been calculated by how much unequal distributions do reduce the welfare value of the national averages of the Human Development Index and of its national income, life expectancy, and education index components. The absolute percentage figures coming out of these sophisticated compilations are open to discussion and depend significantly on certain methodological assumptions. The main relevance of these measures lies in what they tell us about the relative inequalities among major regions of the world.

Table 2: The Loss of Well-being through Unequal Distributions. Per cent of the development index values, 2010.

Region	Life expectancy index	Education index	National income index
Latin America & the Caribbean	15	22	38
Sub-Saharan Africa	42	34	26
Arab states	22	43	18
East Asia & Pacific	16	21	27
Eastern Europe & Central Asia	14	12	16
South Asia	30	41	18
OECD(a)	5	6	20

Note: a. Excl. less developed members, such as Mexico (Latin America) and Turkey (Eastern Europe).

Source: UNDP (2010a: 155).

While in all respects much more unequal than the developed world, here represented by the OECD club (of, mainly, North America, Western Europe, Japan, Korea, and



Australia), Latin America is outstanding among the less fortunate parts of the world only because of its income inequality. Within the region, as measured by the Human Development Index, the largest losses of well-being through unequal distribution are in Bolivia and Nicaragua. The smallest losses you find in Uruguay, Argentina, and Chile (UNDP 2010b: Chart 2.13).

An important part of vital inequality in Latin America constitutes the divide between the indigenous population and the rest – and not so much the one between the *afro-descendientes* and the rest. In the early 2000s, the gap in infant mortality between the two former groups was widest in Panama, Ecuador, Venezuela, and Paraguay (UN 2008: table III: 2).<sup>2</sup>

Systematic data on existential inequality have not yet been collected. In the racialized social hierarchies of the region, we should expect it to be important. Though there are more inter-racial unions in Latin America than in the US or the UK, its “erotic-affective market” is steeped in racial imagery and hierarchy. *Indio* is often used as a stigma, synonymous with “lazy” and “dirty” (Wade 2009: ch. 4). However, it is also true that there have been forceful waves of equalization in recent times. Following the UN Conference on Women in Mexico in 1974, patriarchal laws and institutions were dismantled *en masse* in the 1980s and 1990s as part of the general democratization process (Therborn 2004: 102ff). Though there is still more gender inequality in Latin America than in Latin Europe (UNDP 2010a: table 4), male-female and intergenerational relations are much less unequal than in Africa and Asia. The gender direction of vital inequality is also remarkable. In Latin America boys tend to run a greater risk of chronic malnutrition than girls (UN 2008: 67-9).

Indigenous peoples have also been able to take big strides forward since the 1990s. A successful *india* lawyer and politician in Ecuador, foreign minister for a couple of years in the early 2000s, Nina Pacari has given some examples where she had to start out from in her youth, being denied entrance to hotels, restaurants, swimming-pools – not by institutions of apartheid but by informal exclusions of Indians –, and berated for speaking Quechua on the bus (Torre, de la 2008: 280ff).

Income inequality in Latin America should be noted not only for its size. In the world of the 2000s, Latin America is the only region where inequality is decreasing, even if the overall level is still higher than in other continents. The only national exceptions are Guatemala, Colombia, and Honduras. The biggest progress, in 2002-08, has been made by Venezuela and Argentina (CEPAL 2010: 187). Reducing education inequality

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<sup>2</sup>Data for Peru, another suspect, are missing.

and raising the minimum wage have been the most effective measures, favored by international terms of trade, and the financial crisis of 2009 seems unlikely to undo this (Cornia and Martorano 2010: 33).

Egalitarian change is thus possible in Latin America. Feminist and ethnic movements have been major forces of it, and it is currently high up on the institutional-intellectual (UNDP 2010b, CEPAL 2010) as well as the government agendas, from Argentina to Venezuela. But we should pay attention to a formidable structural obstacle that Latin American egalitarians are up against – apart from the usual forces of national and global capital. It is the double weakness of the nation-state, the weakness of the state as a public institution for service and redistribution (table 1 above) – instead of a particularistic instrument of privilege and violence –, and the weakness of the nation as a social community.

The latter is expressed through enormous socio-economic disparities in the national social space, including across national territories. This could be measured in many ways, but, as so often, income data are easiest to come by.

Table 3: Territorial Disparities of GDP per Capita between the Richest and the Poorest Provinces within Nations and between Selected Nations. Income Ratios, 2005-10.

<i>Top-Bottom National Provinces</i>	<i>Income Ratio</i>
Argentina	8.1
Bolivia	3.6
Brazil	9.2
Chile	4.5
Colombia	4.9
Mexico	6.1
Peru	7.8
France	2.0
Italy	2.0
Spain	1.9
<i>Related Nations</i>	
EU: Netherlands-Bulgaria	3.65
France-Algeria	4.1
Germany-Turkey	2.6
Spain-Ecuador	3.75

Sources: National Provinces: CEPAL 2010: table IV: 1; Nations: UNDP 2010a: table 1.

Intra-national disparities in Latin America are not only much higher than in Europe. They are also much higher than among the 27 countries of the EU and between the poles of major European international immigration chains.

#### 4. Envoi

The southwest-northeast Atlantic diagonal, once the route transferring plundered silver and gold to Europe, now connects one of the most unequal – in income the most unequal – parts of the world with the least unequal one, in particular, the part east of the British Isles, west of Poland, and north of the Alps. To make sense of, and explain, these linked poles and to suggest the means to overcome this oceanic gap constitutes a fascinating as well as demanding challenge.

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