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Inequality Interactions

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Abstract

This paper elaborates a framework for understanding inequalities that is multi-dimensional, inter-disciplinary, and dynamic. We first clarify the conceptual relationship between individual and categorical inequalities as studied by economists, sociologists, and other social scientists. We then present a set of new concepts. *Inequality diversion* is defined as a reduction in one form of inequality that is dependent on sustaining, or worsening, another form of inequality. We show how it arises out of cases in the literature on intersectionality, and that it also characterizes the transition to increasing meritocracy, and the relationship between increasing professional female labour market participation and domestic service. *Inequality re-ordering* is defined as a change in categorical or group inequalities that leaves individual inequality unchanged, such as when elites become more categorically diverse without reducing their economic or social distance from non-elites. We use these concepts to interrogate the potential of levelling up and progressive redistribution for inequality reduction. Exploring these relationships helps us understand trade-offs and complementarities in tackling inequalities.

1. Introduction

It is now a familiar claim that inequality is a pressing and urgent issue, both in terms of social scientific analysis and political intervention. The recent surge of interest has been driven largely by the rise in economic inequality, measured in terms of incomes, consumption, or wealth, that has been observed in most countries since the 1980s.³ Rising economic inequality has meant majority populations have benefitted less than proportionately from economic growth, and has plausibly contributed to rising political disaffection and nationalism. Yet over the same period a variety of inequalities between categories such as broad social classes, genders and sexualities have declined in many countries.⁴ To reconcile and understand these contrasting trends requires a framework that is inter-disciplinary, multi-dimensional and dynamic. The purpose of this paper is to provide such a framework and to use it to explore the relationships between different varieties of inequality.

Our starting point is intersectionality, which over the last three decades has become an increasingly dominant way of bringing together the analysis of categorical inequalities based on race, gender, sexuality and other salient characteristics (see Collins 2015 for discussion). The term ‘intersectionality’ was coined by Crenshaw (1989), who described ways in which Black women in the USA have suffered disadvantage and discrimination that cannot be reduced to a simple sum of gender discrimination and race discrimination: some of their disadvantages are specific to them. For example, before 1964 General Motors in the US hired both White women and Black men, but refused to hire Black women. The concept has since been applied widely; for instance, Boesten (2010) showed how state policies failed poor indigenous women in Peru, whose combination of class, race and gender led to specific vulnerabilities and exclusions.⁵

We develop and extend the idea of intersectionality in two ways. First, we present a framework for integrating economic and sociological approaches to inequalities, showing that they can be complementary. Most current collaborations between economists and sociologists – such as the important work on US social mobility by Raj Chetty and collaborators⁶ – take an applied and largely empirical form and do not attempt to establish a wider interdisciplinary synthesis.⁷ In general, sociologists have sought to take the definitions of economists and add sociological ‘flavour’ to them: thus the trailblazing work of economists

³ See e.g. Atkinson and Piketty (2010); Atkinson (2015); Piketty (2014); Stiglitz (2015).

⁴ On the international rise in social fluidity (intergenerational inequality between large social classes) see Breen (2005); on gender inequality see Weichselbaumer and Winter-Ebmer (2005) and Stotsky et al. 2016; on the changing categorical diversity of the US elite see Zweigenhaft (2001).

⁵ The concept of intersectionality remains controversial (see McCall 2005; Hancock 2007; Walby et al 2012). This partly reflects the way it has arisen largely as a means of exploring the specific relationship between gender and race, and has been bound up with wider debates in feminist and anti-racist scholarship. Walby et al (2012: 230) thus reflect on the way that the concept ‘has often focused on the actions of disadvantaged groups’ rather than the powerful who drive inequalities.

⁶ See references at <http://www.equality-of-opportunity.org/>

⁷ In the UK, economists have presented accounts of declining social mobility (notably Blanden et al 2005; 2010) which have been fundamentally at odds with the sociological analyses of Goldthorpe and his associates, which insist on the persistence of relative social fluidity (e.g. Budoki et al 2015; 2016).

Atkinson, Piketty, Saez and others focusing on the ‘top 1%’ has led to descriptive sociological studies of this ‘top end elite’ (e.g. Keister 2014; 2015; Sherman 2018).⁸ Following Atkinson and Piketty’s lead, sociologists have also sought to establish empirical regularities between social mobility and wealth (e.g. Watkius 2018; Hansen 2018) but have not pushed further to reflect on how economic measures of inequality can cross fertilise with sociological analyses.⁹ Interdisciplinary engagement at a deeper conceptual level has remained limited.

Our second step, and the main contribution of this paper, is to present a set of new concepts for understanding the dynamics of inequalities (how they change over time), and how different types of inequalities cause or depend on one another: what we call ‘inequality interactions’. This focus on the dynamics and causal interactions between different types of inequalities is a complement to intersectionality’s focus on the disadvantages suffered by people who are members of multiple disadvantaged groups. Sociologists have long been animated by multidimensional inequalities and have uncovered many cases where they interact with one another. But as McCall (2017, p. 874) notes, the expansion of research in specific areas “has made it difficult to conduct conversations across these areas despite the reality – no less true today than in the past – of deeply intertwined dynamics.” Our framework, and the set of new concepts we develop, are intended precisely to facilitate conversations about these deeply intertwined dynamics across varieties of inequalities.

The empirical relevance of inequality interactions has a long pedigree: a key text is Crenshaw’s (1989) discussion of the 1965 Moynihan report on the disadvantages suffered by Black people, which introduced the term *intersectionality*. Moynihan claimed that the Black community’s ills were exacerbated by the predominance of female-headed households, which overturned what he saw as the natural patriarchal order in which Black men should be at the head of Black families. His report “depicted a deteriorating Black family, foretold the destruction of the Black male householder and lamented the creation of the Black matriarch” (Crenshaw 1989, p. 163). Crenshaw pointed out the patriarchal nature of Moynihan’s proposals: he hoped to reduce race inequality by strengthening the position of men in Black families, thereby worsening gender inequality.¹⁰

⁸ Anand and Segal (2017) approach the question of global elites from a primarily economic perspective while raising questions on the sociology of these elites.

⁹ One partial exception to this point is the work of Savage (2015), who has tried to link theorisations of ‘wealth elites’ to rethink sociological analysis of social class. See also Korsnes et al (2018).

¹⁰ More recently and on the same basis, Crenshaw (2014) criticized President Obama’s 5-year, US\$200m program “My Brother’s Keeper”, for targeting boys and young men from ethnic minorities while excluding girls and young women, despite the fact that on some indicators these girls do worse than their male counterparts. For instance, in New York and Boston Black girls are disciplined in school 10 to 11 times more than White girls, while Black boys are disciplined 6 to 8 times more than White boys (Crenshaw, Ocen and Nanda 2014, p. 20). These approaches to reducing disadvantage for Black men increase inequality between Black men and Black women, and to the extent that they support patriarchal relations, they push Black women further back. Unlike Moynihan, Obama probably did not intend to weaken the position of Black women. But in both cases putative attempts to reduce inequality between Blacks and Whites came at the cost of increasing inequality between Black men and Black women

While this important insight regarding the interaction between gender and race inequalities has given rise to an enormous literature on intersectionality, it has not been followed-through analytically to provide a more general account of how different inequalities affect one another. In this paper we therefore consider more abstractly the dynamics of interactions between forms of inequalities, with the goal of contributing to a more joined-up conceptualization of inequality, and to the project which Andrew Abbott (2016) sees as vital, of placing the sociological analysis of inequality in a more formal setting.

Section two presents our synthesis of economic and sociological approaches to the study of inequality. Section three defines and develops the concepts *inequality diversion* and *inequality re-ordering*, to describe how some inequalities may depend on, or change, other inequalities. These involve varieties of perverse outcomes resulting from attempts to reduce inequality. Section four explores the implications of *levelling-up* and *progressive redistribution*, which are long-established concepts that are rarely interrogated. Section five concludes with remarks on how better theorizing may contribute to more constructive approaches to reducing inequalities.

2. Inequalities among whom?

To lay the groundwork for our discussion we start by providing a simple classification of two different approaches to inequality: individual inequality, and group inequality. This allows us to present a unified framework for thinking through relationships between inequalities as studied by economists and as studied by sociologists. We will argue that our approach to group inequality allows us to refer more concisely to what sociologists often call ‘categorical’ inequalities (e.g. Tilly 1999).

Individual inequality is inequality in the distribution of some variable(s) of interest across a population. Standard approaches to economic inequality fall under this heading, where the variable of interest might be income, consumption, or wealth. Standard inequality measures such as the Gini or Theil index describe the degree of inequality in this kind of distribution.¹¹ However, individual inequality might also be inequality of power, of education levels or health status, or of access to some public good or service.¹² Whatever the variable, the unit of analysis is the individual and normative judgements about income inequality – such as the statement that less inequality is better than more inequality – are explicitly based on the normative assumption that all individuals have equal weight.

¹¹ Empirical measures are often based on household rather than individual characteristics (e.g. survey-based measures assign the same level of income and consumption to all individuals within the household, except in studies where intra-household distribution is specifically under investigation). But this is a matter of empirical feasibility rather than conceptual foundation.

¹² Multidimensional poverty indices (see Alkire and Foster 2011 for discussion) are, like individual inequality, based on distributions across individuals, where interest is confined to the bottom of the distribution.

Economists formalize this normative approach using the concept of a social welfare function (SWF), which aggregates individuals' well-being (as measured by the relevant variables) into a single index. As Dalton (1920) pointed out nearly a century ago, and Atkinson (1970) explored formally, standard inequality measures, when used normatively, implicitly assume a specific SWF; and standard SWFs are egalitarian in the sense that an additional dollar (or other unit) going to a rich person increases social welfare by less than an additional dollar going to a poor person. Equivalently, a transfer of one dollar from a rich person to a poor person will increase social welfare.¹³

In contrast, group inequality refers, naturally, to inequalities between groups, which may be defined in a variety of ways. Group inequalities are often referred to in the sociology literature as categorical inequalities, but we need to be careful here, as the idea of category typically covers several different issues. Here Fourcade (2016) usefully distinguishes between 'nominal' differentiation, which refers to essential or ontological differences between categories, and 'cardinal' distinctions which are quantitative in form. Thus, statements such as 'women earn 15% less than men on average' are cardinal statements about between-group inequality where the groups are men and women, conceived simply as different sets of individuals. They are an essential input to discussions of gender inequalities. But they need not imply anything ontological about distinctions between men and women as such.

While in one sense the point is obvious, the failure to make this distinction can lead to the danger emphasized by Abbott (2016) of smuggling in normative assumptions to apparently analytical discourses on inequality. It becomes possible to leap from the observation of cardinal differentiations towards the view that ontological properties are generating these, e.g. that of social relations between categories such as male/female, black/white, or worker/capitalist (e.g. Tilly 1999). Following this logic, inequalities between groups are sometimes described as "vectors of oppression and privilege" or a "matrix of domination" (Ritzer and Stepnisky, 2008, p. 315; Collins, 2000). Such descriptions may be accurate: cardinal differences ('women earn 15% less than men') may indeed be caused by mechanisms of oppression or domination, and will often have strong normative implications. But these should not be conflated. In short we need to be careful to unpack (a) views on the underlying meanings or significations of the categories, (b) views of the causes of the inequalities between them, and (c) the normative assumption that such inequalities are undesirable and should be reduced.

This kind of conflation between nominal and cardinal differences is probably most evident within class analysis. Here, we can move rapidly from the recognition of the inequalities between those in different socio-economic positions defined by their role in the process of economic production (e.g. as a worker or a capitalist), or their position in socio-cultural

¹³ This approach includes utilitarianism, but a more egalitarian approach is to assume that individual utilities provide diminishing marginal returns to social welfare, in addition to individual income providing diminishing marginal returns to utility. Thus an extra unit of utility going to a very happy person adds less to social welfare than an extra unit of utility going to a less happy person (Atkinson and Brandolini 2015, p 214, and see Sen 1973 for a full discussion of these issues).

hierarchies (Savage et al., 2005), towards an underlying ontology. This can lead to a tautological conflation along the following lines: inequalities are produced by class divisions, and we know that there are class divisions because we observe unequal outcomes. Even though Goldthorpe (2007) explicitly disavows a form of class analysis based on theories of exploitation, it then becomes possible, as Abbott argues, for normative judgements to be yoked to these accounts.¹⁴

In this paper we therefore avoid this under-theorised yet endemic appeal to ‘categories’ to focus on group inequalities as inequalities between groups of individuals. This allows us to recognise the significance of group differences, while facilitating the analysis of interactions with individual inequalities. Even if some truths about categorical inequalities can only be stated in terms of social structures, or social relations, it remains true that changes in categorical inequalities (e.g. a decline in institutional racism, or a rise in exploitation of workers by capitalists) *imply changes in* inequalities between (at least some of) the individuals who make up those categories. Equally, changes in inequalities between individuals often *imply changes in* inequalities between groups of individuals. These are among the inequality interactions we will elaborate below.

3. Inequality diversion and other pitfalls

We now turn to the question of inequality interactions and consider how attempts to reduce inequalities can lead to a variety of dilemmas and perverse outcomes. We start with the concept of *inequality diversion*: this is defined as a reduction in one form of inequality that is dependent on sustaining, or worsening, another form of inequality (which could be between groups or individuals). Inequality diversion comes in a strong version and a weak version. In the strong version, one form of inequality is reduced at the expense of rising inequality in another. In the weak version, a reduction of one form of inequality is dependent on another form of inequality being sustained, even if it does not worsen that inequality. We then define inequality re-ordering as a change in group inequalities that leaves individual inequality unchanged. While sometimes desirable from an egalitarian perspective, it may have unintended consequences.

Strong inequality diversion: meritocracy and economic inequality

In our introduction we cited Crenshaw’s (1989) foundational discussion of disadvantage due to intersecting race and gender, where one of her cases represented a putative attempt to reduce race inequality that would have the effect of exacerbating inequality between Black men and Black women. Crenshaw’s primary concern was the further disadvantaging of Black

¹⁴ Although Goldthorpe’s account of class (e.g. 1996; 2010) disavows a normative theory of class ‘exploitation’ this is at the cost of clarity about why class should be seen as a ‘group’ measure at all. Indeed he has himself stated that “instead of adopting the ‘typological’ approach that is implicit in the scheme, would it not be better to think of the service relationship and the labour contract as simply marking the theoretical limits of what is in fact a continuum of forms of employment regulation?” (Goldthorpe 1997: 42). However, if he is pointing to a continuum in the nature of employment relations, it is unclear why this should be theorised in terms of class. His most recent work emphasises how certain occupations have a combination of employment relations and further complicates this issue.

women. Here we view the case from a slightly different angle: an attempt to reduce inequality in one dimension, race, threatened to worsen inequality in another dimension, gender. It is therefore a case of strong inequality diversion.

Here we see parallels with a finding which has been extensively recognised in the analysis of social mobility: that a reduction in inequalities due to social class at birth was followed by a rise in other economic and social inequalities – associated with educational attainment and credentialism. Thus in the UK (as in many other nations) absolute social mobility increased after the Second World War, yet this was followed by a large rise in income inequality after 1980, during the working lives of the beneficiaries of this mobility, and in recent decades professionals and managers have enjoyed burgeoning economic fortunes (Williams 2013)

There is a long recognition of this paradoxical interaction. British sociologist and revisionist socialist Michael Young famously coined the term “meritocracy” in his 1958 satire “The Rise of the Meritocracy”. He hoped to draw attention to the inequalities which would be generated in a society in which birth no longer played a role in socio-economic status, but instead “merit”, defined as ability plus effort, would determine everyone’s position. To varying degrees this is the transition made by many societies since the late 19th century, driven (argued Young) by the universalization of education. Yet in Young’s portrayal meritocracy does not lead to a less stratified or unequal society. Instead, it becomes still more unequal: “now that people are classified by ability, the gap between the classes has inevitably become wider” (Young 1958, p. 106).

In addition to widening the gaps between classes, he feared that stratification by “merit” would create a new morality of desert: the poor would know that their poverty was their own fault, rather than a reflection of an unfair society. They would be “bound to recognise that they have an inferior status – not as in the past because they were denied opportunity; but because they *are* inferior” (Young 1958. p. 107-8). Meanwhile at the top of the distribution, “the eminent know that success is a just reward for their own capacity, for their own efforts, and for their own undeniable achievement. They deserve to belong to a superior class”. Looking back on his book and his country over 40 years later, Young (2001) argued that this was part of the explanation for the dramatic rise in inequality observed in the UK (and one could add the US, among other countries) in the last two decades of the twentieth century: “So assured have the elite become that there is almost no block on the rewards they arrogate to themselves... Salaries and fees have shot up. Generous share option schemes have proliferated. Top bonuses and golden handshakes have multiplied.”¹⁵

This theme has been elaborated by educational sociologists, notably those drawing on Pierre Bourdieu’s concept of ‘cultural capital’ (e.g. Bennett et al 2010; Lareau 1998; Prieur et al 2010). This research has shown that while educational attainment has indeed become a major factor permitting upward social mobility, this does not entail that inequalities in social mobility have declined. Rather, children from culturally advantaged backgrounds perform well

¹⁵ See Jackson and Segal (2003) for further discussion of the UK case.

educationally and hence move into higher level jobs. Instead of contributing to equalizing outcomes, education becomes another arena in which to express and reproduce existing inequalities. Daniel Markovitz (forthcoming) describes the enormous investments that rich parents in the US make in order to get their children into the ‘right’ schools and colleges that will help them procure elite positions in adulthood, arguing that these investments are equivalent in value to multi-million dollar inheritances. Byun and Kim (2010) find that in South Korea in 2008, 9 out of 10 students with monthly family incomes above US\$6,300 received private tutoring, compared with 4 out of 10 students whose monthly family income was below about US\$900. This is why educational expansion need not reduce inequality:¹⁶ inequalities get reproduced at every level of education, because richer families use their greater resources to cultivate educational merit in their children.

The rise of meritocracy is therefore a case of strong inequality diversion because the decline in class- or birth-based inequality – or one could say, the decline in inequality of opportunity – came at the cost of more inequality in two other senses. First, it contributed to the widely-documented rise in individual economic inequality. Second, according to Young, and as also elaborated by Bourdieu (1985), it worsens the inequality of social status between the rich and poor: the rich feel deserving and superior, while “the poor and the disadvantaged... can easily become demoralised by being looked down on so woundingly by people who have done well for themselves. It is hard indeed in a society that makes so much of merit to be judged as having none. No underclass has ever been left as morally naked as that” (Young 2001).

The irony is that where meritocracy contributed to a rise in income inequality, the rise in inequality in turn may have led to a decline in social mobility in the UK. The intergenerational transmission of income was higher for the cohort born in 1970 than the cohort born in 1958, partly because the expansion of higher education benefited people from rich families much more than those from poor families (Blanden et al. 2002, and see more generally Corak 2013; Major and Machin 2018). We return to the link between income inequality and social mobility later. For now we just remark that this dynamic, whereby meritocracy increases income inequality, which then reduces social mobility, suggests that attempts to increase social mobility through meritocracy are likely to be self-defeating.

Weak inequality diversion

Weak inequality diversion occurs when a reduction in one form of inequality is dependent on another form of inequality, although it does not cause it or worsen it (unlike strong inequality diversion). A widely-discussed example is the fact that the expansion of women’s participation in the labour force, particularly for highly-paid professional women, has depended on the availability of low-paid domestic workers who perform the house work formerly performed by women in their own houses. In her study of domestic service in the USA in the 20th century, Palmer (1989: x) remarks that, as a “middle class” professional in

¹⁶ For instance, Chetty et al. (2014) show for the US that the correlation between parent and child income percentile ranks was stable for 1971–1986 birth cohorts, a period of rapid educational expansion.

Washington, D.C., “Nearly all of my women friends in Washington hire another woman to do some of ‘our’ work. I have a one-day-a-week housecleaner, and several friends with young children have full-time housekeepers. Almost no one I know cleans her own house, and many do not do their own laundry or prepare most of their childrens’ meals.” Since domestic workers are usually women, Flanagan (2004) states that “many of the gains of professional-class working women have been leveraged on the backs of poor women”.¹⁷ Moreover, in rich countries the poor women employed to do this domestic labour are often immigrants, meaning they suffer from intersecting, and thereby intensified, disadvantage (Sassen 2002).

In this case, reductions in gender inequality, driven by women entering highly-paid professions and hence competing with male high earners, depend on a pre-existing economic inequality that makes domestic service affordable for these professionals – meaning the wages of domestic workers are small relative to the wages of professionals.¹⁸ Thus a reduction in gender inequality draws on the existence of individual income inequality, and specifically inequality between high-paid women and low-paid women (where the low paid women are also likely to be immigrants).

This case highlights the importance of distinguishing between strong and weak inequality diversion. Bowman and Cole (2009, p. 165) state that hiring a housecleaner “displace[s] inequality from the male-female axis to the householder-housekeeper axis”. However, this remark, like Flanagan’s evocative phrase “leveraged on the backs of poor women”, is misleading: both seem to imply that the service relation *increases* inequality between the householder and the housekeeper, which would be strong inequality diversion – and this seems doubtful, whether from the perspective of social relations or of economic inequality. From the perspective of social relations, the question is whether the vector of domination is worse for domestic workers than for other workers. Ehrenreich (2001, p. 53) states that she finds the idea of employing a cleaner “repugnant” because “this is not the kind of relationship that I want to have with another human being”. But if cleaning other people’s houses is an unpleasant job, it is not obvious that it is worse than numerous other kinds of casual and insecure forms of employment.¹⁹ There is no reason to believe that if a highly-paid woman chooses to do her own household’s chores rather than employ a domestic worker (the “second shift”) then the would-be domestic worker will find a less oppressive job instead.²⁰

¹⁷ Remarkably, Young’s (1958, pp. 121-2) *Rise of Meritocracy* also foresaw this phenomenon: in his imagined dystopia, low-ability people, especially low-ability women, were fed into domestic service precisely to free high-ability people, especially high-ability women, from “household drudgery” so they could dedicate themselves to their high-status jobs.

¹⁸ Segal (forthcoming) analyses the specific form of inequality that means that low-wage workers are cheap to employ for the highly-paid.

¹⁹ Romero (1992, p. 12, quoted in Milkman et al 1998, p. 489) notes, “On the one hand, cleaning houses is degrading and embarrassing; on the other, domestic service can be higher paying, more autonomous and less dehumanizing than other low-status, low-skilled occupations”.

²⁰ In Sassen’s (2002) discussion of the globalization of low-paid workers she gives particular attention to the brutal practice of human trafficking. However, she does not claim that trafficked persons comprise a significant proportion of domestic service workers (and the United Nations Office on Drugs and Crime (2014, p. 30) remarks that “there is no methodologically sound available estimate” for the number of people trafficked). For domestic workers who have been trafficked, it would be the trafficking rather than the domestic service work that causes suffering.

From the perspective of individual economic inequality, there is also no reason to assume that inequality between the householder and the domestic worker has been increased by the service relation. Indeed, employing a domestic worker raises demand for low-wage labour and would be expected to increase domestic worker pay, reducing economic inequality between householders and domestic workers in general. This is consistent with the finding in the US and some other rich countries that both employment and wages of low-wage service occupations have grown relative to mid-wage jobs since the 1980s (Autor and Dorn 2013), and that rising demand for these services is partly explained by the fact that wages at the top of the distribution have risen still faster (Mazzolari and Ragusa 2013).²¹

On the basis of a detailed examination of the Swedish case, Bowman and Cole (2009, p. 160) “remain unconvinced that normative constraints should limit the development of a market for domestic services” and support the commodification of housework as long as it is institutionalized and regulated like the rest of the labour market. Their conclusion points to a way in which the framework of inequality interactions helps to clarify the issues. First, distinguishing clearly between the different forms of inequality enables us to separately express approval for the decline in gender inequality, and disapproval for the pre-existing inequality between low-paid and high-paid workers. Second, it gives us the conceptual space to query whether the former really worsens the latter – we have argued it does not – and to conclude that we want to reduce inequality between low-paid and high-paid workers without needing to route it through a critique of women entering high-paid professions.

Inequality re-ordering

We next define *inequality re-ordering* as a change in the degree of inequality between groups that occurs without any causally-related change in individual inequality. The distances between positions in the distribution remain the same but the profile of who is in which position changes. The cases of interest are when categorical inequalities decline but individual inequalities stay constant or even rise. This is like weak inequality diversion in that one type of inequality (between groups) is reduced while another (between individuals) is not, but this reduction does not *require* or *depend on* the remaining inequality to be sustained, and in that sense is less problematic than weak inequality diversion.

One example is given by gender inequality and income inequality in the UK. The gender pay gap for full-time workers fell from 17.4% in 1997 to 9.4% in 2016 (ONS 2016) – while estimated income inequality either remained stable or increased slightly, depending on the data source used.²²

²¹ Some years earlier, Sassen (2002, p. 255) informally noted “the reemergence of a ‘serving class’ in contemporary high-income households and neighborhoods”. She also claims that the employment of immigrants in domestic service has undermined the link between rising demand for workers and “workers’ empowerment”, which is a version of the argument that immigrants reduce wages of domestic workers. But she offers no evidence for this claim, and the recent evidence just cited finds that their wages have risen.

²² Cribb et al. (2017) find the Gini coefficient to be relatively stable using official data, while the income share of the top 1% according to tax data was more variable and increased from 12.1% in 1997 to a high of 15.4% in 2009-10, declining to 13.9% in 2014 (WID.world).

Anand and Segal (2017) show that inequality reordering can also be found at the level of the global elite. Over 1988 to 2012 the country-composition of the global top 1% became more diverse: 85% of people in this group were from advanced economies in 1988, falling to 77% in 2012 as East Asia, Central and Eastern Europe, Sub-Saharan Africa and South Asia all saw their shares rise. But over the same period the income share of this global top 1% rose from 17.0% to 18.2% (after peaking in 2005 at 20.2%). The rise in geographic diversity in the global elite occurred even as they increased their distance from the rest of the world's population.

A similar outcome can be seen within the US power elite. Zweigenhaft (2001) reports an increase in the participation of women and minorities in the US elite since the 1950s, even while overall income inequality in the US has risen. Thus inequality of access to elite positions between certain groups or categories has declined. But this change in the composition of the elite does not reflect increased openness in other respects. Zweigenhaft (2001: 279) reports that "Newcomers to the power elite are likely to have attended prestigious colleges and universities", following traditional routes to the elite. Moreover, "We find no evidence of a kinder, gentler power elite in how it functions."²³

At the global level and within countries inequality has been *re-ordered* because some individuals in previously-excluded groups have now moved upwards in the distribution, but the distribution has not become more equal. Inequality re-ordering is a zero-sum game: individuals from one group do better at the expense of individuals from another group.

While it is important to realise that inequality reordering is a far cry from unambiguous inequality reduction, the fact that it is a zero-sum game does not mean it is not desirable. For instance, a high degree of economic inequality where Black people are evenly distributed from the rich to the poor seems less objectionable than the same degree of inequality where Black people are bunched towards the bottom. But its desirability is at least limited by the fact that it does not help individual inequality. It is hard to disagree with Zweigenhaft's assessment that, "To the women [who were fired by] the Hathaway Shirt Company it was not evidence of great progress that the CEO of the corporation that owned their company was a woman." In this vein, Black feminist scholar Collins (2000, p. x) remarks that "empowerment for African-American women will never occur in a context characterized by oppression and social injustice" and that "Black feminist thought works on behalf of Black women, but does so in conjunction with other similar social justice projects". Liberal conceptions in which the primary goal of inequality reduction is to ease the path of upward social mobility for disadvantaged groups risk settling for inequality reordering, and neglecting the injustice of inequality *per se*.

²³ He cites the example of a female CEO of the Hathaway Shirt Company who fired 500 of her female employees as a cost-saving measure, and received \$10 million in salary and stocks – behaviour typical of CEOs *per se*, and independent of gender, race or sexuality.

Fraser (2000) similarly argues that the politics of identity, or “recognition”, had displaced the politics of distribution, or economic justice. Starting from the assumption that there is a limited amount of political capital or energy available for challenging inequalities, Fraser’s “displacement problem” is that the energy that could have been directed towards challenging economic inequality has instead been aimed at increasing recognition and valorization of disadvantaged groups, without addressing the underlying causes of their disadvantage. Fraser’s proposed solution to this problem is to tackle laws, policies, and other institutions that embed unequal treatment of groups. She calls this the “status model”, which aims to ensure equal status of all under social institutions regardless of group identity, in contrast to the “identity model,” which reifies group identities. As an example she argues that, rather than valorizing and reifying homosexual identity, it is better to argue for equal rights to marriage. However, it is not clear how this might apply to, for instance, gender income inequality, where caring professions dominated by women tend to be low paid: in a market economy there is no straight-forward institutional change that will undo this inequality. Moreover, even in the case of gay marriage one doubts that the political will behind the recent wave of legalizations would have been present without the earlier campaigning work to valorize the status of homosexuality. This is a problem with no easy solution, as Fraser acknowledges.

Discourses of inequality re-ordering also give rise to a second risk: Flemmen and Savage (2017) find in the UK that “because certain kinds of universalist anti-racist repertoires are associated with those in senior managerial and professional positions, this might run the risk of creating a backlash from those in more marginal positions,” and that nationalism becomes “the main ‘legitimate’ way in which anti-establishment sentiment can be manifested”. This chimes with Young’s (1958) concern about the extent to which meritocracy may heighten inequality in sense of worth. As in the cases of inequality diversion above, genuine concerns with redressing inequalities may have perverse effects because of the power of inequality interactions.

4. Levelling up and redistribution

Given our concerns with the powerful forces of inequality diversion, how can we effectively address undesirable inequalities? In this section we examine forms of inequality reduction that can unambiguously increase social welfare by either avoiding negative inequality interactions, or by fostering positive inequality interactions. *Levelling up* reduces inequality solely by improving the lot of the disadvantaged. *Progressive redistribution* means transferring some good (such as income or power) from the better-off to the worse-off.

Levelling up

Levelling up means improving the well-being of the worst-off. Levelling up is unambiguously inequality-reducing, and in the terminology of economists it also implies a Pareto improvement: it makes some better-off and makes no one worse-off. It is levelling-up that Crenshaw (1989, p. 167) proposes when she suggests that “efforts instead beg[in] with

addressing the needs and problems of those who are most disadvantaged”. As she argued in her objections to Moynihan and to *My Brother’s Keeper*, Black girls and women typically suffer more disadvantage than their male counterparts. It followed that while helping Black males might reduce racial inequality, it might equally increase gender inequality. Focusing on the worst-off group – in this case, Black females – ensures that the effect is purely inequality-reducing.²⁴

A different example of levelling up is the *Black Lives Matter* (BLM) movement, which concerns institutional behaviour rather than the allocation of resources. BLM was a response to police killings of Black people in the US, and the systematic acquittal of the police officers involved. Yet in response, some people used the phrase “all lives matter” as a criticism of BLM. The superficial appeal of “all lives matter” is that it sounds more egalitarian than “Black lives matter”, and the contrast is intended to impute to BLM a lack of concern for non-Black people. But this is a confusion. “Black lives matter” was drawing attention to a specific harm, or risk, faced by Black people, and was a call to action to tackle this harm. US institutions already recognize that the lives of White people matter; BLM is equivalent to saying “Black lives *also* matter”. Thus “Black lives matter” is a call for levelling up – an attempt to increase the well-being of a disadvantaged group to the level enjoyed by the non-disadvantaged, in this case reducing inequality by reducing a specific injustice.

In the field of economics, policies that improve the productivity of the poor are also examples of levelling up. These include early-years interventions to improve educational outcomes for children from disadvantaged families (Bate 2017), or policies to encourage the take-up of fertilizers by peasants, to improve their yields (e.g. Duflo et al. 2011). While they may incur upfront costs, these have the character of investments that produce a return, and thus do not require redistribution of resources away from others.

If we want to strictly avoid increasing inequalities, we have to take seriously Crenshaw’s focus on the “most disadvantaged” groups. How do we interpret this in designing policy? It surely does not mean that we have to focus all efforts solely on the maximally disadvantaged group, the intersection of every disadvantaged category we can think of, however few people it may comprise – that would imply neglecting too many other disadvantaged people. Instead, a plausible test for a policy is that it should achieve *levelling up* rather than *inequality diversion*. This means designing policies that favour a disadvantaged group, without worsening inequality between them and some other *more* disadvantaged group. Thus if Black women are particularly disadvantaged, the much smaller group of Black women with multiple sclerosis are certainly more so. This does not imply that policy should not be aimed at Black women in general: instead, levelling up requires that a policy that helps Black women in general should also help Black women with multiple sclerosis, rather than leading to the able-

²⁴ This is pure levelling up when the most disadvantaged face less stigma, or less discrimination, or achieve better educational outcomes. To the extent that it requires transferring resources to them, as in Crenshaw’s argument that the expenditures of *My Brother’s Keeper* should be extended to Black girls, it would imply progressive redistribution = discussed in the next section.

bodied pulling away further from the disabled. Or to return to Crenshaw's case, policies that help Black people in general should be pursued, but not those that help Black men only and leave Black women behind.

An example of the tension between levelling up and inequality diversion can be seen in debates over trans inclusivity. One element (of many) in this debate concerns whether those who are born biologically male and who now self-identify as women should be allowed to use spaces and resources reserved for women. Finlayson et al. (2018) argue that they should, in part because trans women are a particularly disadvantaged subset of women. That is, offering them safer spaces counts as levelling up. On the other hand, Stock (2018) argues that this policy "poses unacceptable harm to the original occupants of the category 'woman'" by compromising the purpose of women-only spaces and resources. On this view, it reduces disadvantage for trans women at the cost of worsening disadvantage for other women, making it a case of strong inequality diversion (also see Goude 2016).

Few would express disagreement with a policy of pure levelling up. As it helps some and harms no one, even non-egalitarians tend to approve. Consider the World Bank. Their 2016 "Poverty and Shared Prosperity" report was titled "Taking on Inequality" (notably not "reducing" or even "tackling" inequality). They report (p. 1) that "On April 20, 2013, the Board of Executive Directors of the World Bank adopted two ambitious goals: end global extreme poverty and promote shared prosperity in every country in a sustainable way...fostering the growth in the income or the consumption expenditure of the poorest 40 percent of the population (the bottom 40) in each country." This is levelling up, stopping well short of a call for progressive redistribution.²⁵

However, it is important to realise that the scope for reducing inequality through levelling up is very limited. In the case of economic inequality this is primarily because there are limited productive investments that increase the incomes of the poor.²⁶ Moreover, levelling up evidently cannot be achieved for inequalities that involve exploitation, since removing the exploitation has a cost for the exploiter. The same applies to many socially-essential goods other than income, such as places in good universities: for instance, raising numbers of ethnic minorities attending top universities cannot be achieved by levelling-up, but requires redistribution of those places. Given finite resources, much inequality reduction requires redistribution of those resources – which brings us to our final topic.

Progressive redistribution

²⁵ While the World Bank promotes a focus on raising the incomes of the bottom 40%, it does not go so far as to state that they should rise *faster* than the incomes of the top 60%. So while levelling up is one way to achieve their stated aim, it is also consistent with incomes of the top 60% rising faster, and inequality increasing.

²⁶ Moreover, even if the productivity of lower classes does rise, in some cases the rich are able to expropriate the rise in output and incomes for themselves. This has occurred in the US, where labour productivity has massively outstripped median wages since about 1970 because most of the benefits of rising productivity have been channelled into the incomes of higher earners (see e.g. Bivens and Mishel 2015).

For economists, progressive redistribution is the canonical form of inequality reduction and that which has received most attention and analysis. We start by summarizing the economic approach to progressive redistribution and then explore what it means for inequality interactions.

We saw above that the economic theory of social welfare is based on the concept of a social welfare function that depends on the incomes (or other relevant variable) of all individuals. The key normative assumption is that giving one dollar to a worse-off person increases social welfare by more than giving it to a better-off person. As William Beveridge put it in 1936, ‘1s. in a poor man’s pocket usually buys more welfare than 1s. in a richer man’s pocket; it meets more urgent needs’ (Beveridge 1936, p. 66, quoted in Jackson and Segal 2004, p. 19). This is known as the assumption of concavity, and implies diminishing marginal returns of each individual’s income to social welfare.²⁷

Economists have developed this idea through the concept of the *Pigou-Dalton transfer*, defined as a transfer of income (or other welfare variable) from a richer person to a poorer person, that is not so large as to reverse their ordering in the distribution.²⁸ On the standard economists’ approach, Pigou-Dalton transfers are unambiguously social welfare-increasing. Atkinson (1970) analyses the implications of this by defining the *equally distributed equivalent income*, y_{ede} , as the mean income that would achieve the same social welfare as currently obtains, if there were perfect equality with everyone receiving y_{ede} . This quantity will be lower than the existing (unequally-distributed) mean income because existing inequality implies a “waste” of income, from the perspective of social welfare.

How does redistribution interact with other inequalities? First note that redistribution can also apply to power relations or social status in hierarchies, even if they cannot be measured with the numerical precision of money. Flattening a social hierarchy implies reducing the social status of those at the top in order to raise those at the bottom; legislation that supports labour unions can redistribute bargaining power from employers to workers. These examples immediately suggest a set of *positive* inequality interactions where redistribution in one dimension is likely to cause redistribution in other dimensions: a progressive redistribution of bargaining power in the labour market is likely to lead to a progressive redistribution of income through higher wages and lower profits. Equally, it is a common argument in the republican tradition for a basic income that redistribution of income is likely to lead to redistribution of power: by giving everyone a degree of economic independence it improves the outside option

²⁷ Recall from footnote 12 above that in addition to individual well-being being concave in income, an egalitarian SWF may take social welfare to be concave in individual well-being.

²⁸ Pigou-Dalton transfers are fundamental to the economic analysis of inequality, because of two key results (Atkinson 1970; see Sen 1973 for discussion). Consider two distributions A and B with the same mean. First, the Lorenz curve of distribution A lies above that of distribution B – described as “A Lorenz dominates B” – if and only if A can be achieved by applying a series of Pigou-Dalton transfers to B. Second, if A Lorenz dominates B then any egalitarian social welfare function will show A to have higher social welfare. Thus a Pigou-Dalton transfer must increase social welfare – which also follows directly from the concavity assumption above. For these reasons it is a standard axiom of measures of economic inequality that any such measure must be Lorenz-consistent, meaning they will assign a lower level of inequality to distribution A.

of workers, increasing their bargaining power with respect to employers and reducing the risk of mistreatment or domination (van Parijs 2004).

Progressive redistribution of income probably also leads to increased social mobility, or equality of opportunity. R. H. Tawney in his 1931 work *Equality* (Tawney 1931, p. 143, quoted in Jackson and Segal 2004) argued that:

opportunities to rise are not a substitute for a large measure of practical equality, nor do they make immaterial the existence of sharp disparities of income and social condition. On the contrary, it is only the presence of a high degree of practical equality which can diffuse and generalise opportunities to rise. Their existence in fact, and not merely in form, depends, not only upon an open road, but upon an equal start.

Atkinson (1998, p. vi) made the point in terms of intergenerational mobility, noting that “inequality of outcome today is a cause of inequality of opportunity in the next generation.” Jackson and Segal (2004) argued that countries with lower levels of economic inequality also have higher levels of intergenerational mobility, a regularity that has more recently (and using more data) been denoted the Great Gatsby curve (Krueger 2012). We have seen the mechanisms above: richer parents tend to make larger investments in their children’s education, and endow them with more social and cultural capital, all of which enable them to earn more income.

How does progressive redistribution among individuals affect inequality between groups? Some inequality measures can be used to explicitly divide overall inequality into inequalities between groups, and inequalities within groups.²⁹ The first-order effect of a generic progressive redistribution will be positive: a decline in inequality among individuals will in general automatically reduce inequality between groups. One way to see this is to note that a reduction in the distance between points of the income distribution will in general reduce inequality between subsets of the distribution.³⁰ Consistent with this theoretical argument, the IMF’s Gonzales et al. (2015, p. 7) found that empirically “gender inequality is strongly associated with income inequality”, across countries and over time. Similarly, Ikemura Amaral and Loureiro (2017) find that declining inequalities in Brazil between men and women, and between racial groups, were driven by the more general decline in income inequality between households.

However, even if the *outcome* of progressive redistribution generically reduces inequality between groups, it is quite possible for specific *policies* aimed at progressive redistribution to cause a kind of inequality diversion. In particular, it has long been recognized that targeted benefits can create stigma. Titmuss (1968, p. 134) wrote that if benefits and services are

²⁹ See Anand and Segal (2008, p. 85) for a discussion of decomposable inequality indices, with application to decomposing global inequality into within- and between-country inequality.

³⁰ One can imagine theoretical counter examples (e.g. a set of policies that massively reduce inequality among Whites while specifically reducing incomes for Blacks), but this statement would apply to any standard inequality-reducing policy.

provided “on a discriminatory, means-test basis” then they will “foster the sense of personal failure and the stigma of public burden”. When such redistributive policies exacerbate inequalities of status, it is a kind of strong inequality diversion – though an important difference from the cases discussed above is that in this case the increased disadvantage is in a *different dimension* for the *same people*. Unlike the cases above, it does not improve matters for one disadvantaged group at the expense of an even more disadvantaged group. In this sense it may be normatively less ambiguous: those who suffer from the stigma are the same people who gain from the benefit, and weighing up the net gain or loss to an individual may be less difficult than weighing up gains for some against losses for others.

The possibility of inequality diversion to increased stigma is an argument for more universalist policies that also imply progressive redistribution, without discriminating among groups.³¹ Given the difficulties of designing such policies, this is a long-running and ongoing challenge for the design of social policy.³² However, as Titmuss also noted, the “stigma of the means test” is a deliberate feature of some welfare systems, intended to discourage take-up of the benefit or service in question. For instance, Stuber and Kronebusch (2004) find in the US that nearly half of actual and potential recipients of welfare benefits agreed that ‘the application process for welfare is humiliating’ and that ‘many people are poorly treated when they apply’. Given this, mere political will, and relevant training of benefits staff, would no doubt go some way to reducing stigma associated with some policies for progressive redistribution.

5. Conclusion

The empirical study of inequalities has made great strides in recent years and has forced recognition both inside and outside academia of the importance of inequality as a societal issue – to the point that in 2012 even the global elite attending the World Economic Forum at Davos judged “severe income disparity” to be the single most likely global risk, and with one of the highest potential impacts.³³ But debate over inequality issues is highly fragmented, and there is little effective dialogue between scholars and activists addressing different kinds of inequalities. It is for these reasons that we have tried to develop an analytical framework to address the dynamics of intersectional inequalities, and more broadly the interactions between different forms of inequality, setting the study of multidimensional inequalities on a more formal footing.

³¹ Fraser (1995) generalizes this argument in the context of her “redistribution-recognition dilemma”, arguing that stigma would be avoided by a “transformative” socialist or social democratic approach based on “universalist social-welfare programmes, steeply progressive taxation, macroeconomic policies aimed at creating full employment, a large non-market public sector, significant public and/or collective ownership, and democratic decision-making about basic socioeconomic priorities” (p. 85). However, Titmuss also pointed out that the fact that people have widely varying needs implies that universalist policies are not sufficient as a model of welfare. Universalist policies may provide a non-discriminatory approach to reducing inequalities between groups that are defined by identity, but they cannot substitute for targeted benefits to compensate “those whose needs are greatest” (Titmuss 1968, p. 135).

³² See Baumberg (2012, 2016) for recent evidence for the UK, and Stuber and Kronebusch (2004) on the US.

³³ Cited in Anand and Segal (2017, p. 111).

Any joined-up understanding of the range of socially salient inequalities requires engagement with both economic and sociological approaches. The economic approach to inequality contributes on the one hand a rigorous specification of the logical relationship between individual and group inequalities, and on the other hand a clear separation between analytical, normative and causal claims. The sociological approach broadens the scope of the variables that define inequalities, their causes, and the mechanisms of transmission of inequalities – including the transmission across different types of inequalities, which we have termed inequality interactions.

Our focus on inequality interactions may also help to counter overly-optimistic accounts which see declines in many group inequalities, including gender wage gaps, some forms of racism, and stigmatization of sexual minorities, as unambiguous indicators of lower inequality. We have argued that declining inequality on a single dimension may have contradictory implications on other dimensions through inequality diversion, often in unanticipated ways, and that we therefore need to build a recognition of inequality interactions into our thinking.

Inequality diversion is widespread, but it is not inevitable. In some cases the solution is obvious once the problem is highlighted – as in Crenshaw’s (2014) insistence that the US federal government support all Black children, not just Black boys. In other cases, conceptual clarity can help us to locate the problem more precisely and avoid misdirected criticism, as in the debate on the reliance of professional women on domestic service. In this case the challenge is to find ways to address the inequalities suffered by low-skill workers without compromising gains in gender equality among professionals. We have also explored ways to unambiguously reduce inequalities through levelling-up and progressive redistribution. Even in these canonical forms of inequality reduction, certain policies that reduce economic inequality may create inequality diversion to increased stigma – but again, such problems are not inevitable given appropriate political will. We hope that the framework provided here will help to clarify these solutions and tradeoffs, facilitate communication between those working on different varieties of inequalities, and contribute to ongoing efforts to reduce them.

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